AGENDA

ALISO VIEJO CITY COUNCIL
WEDNESDAY, JANUARY 19, 2022
7:00 PM REGULAR MEETING

City Hall
Council Chambers
12 Journey
Aliso Viejo, CA

Mayor Ross Chun
Mayor Pro Tem Richard W. Hurt
Councilmember Tiffany Ackley
Councilmember David C. Harrington
Councilmember Mike Munzing

SPECIAL NOTICE REGARDING COVID-19

On March 4, 2020, Governor Newsom proclaimed a State of Emergency in California as a result of the threat of COVID-19. On September 16, 2021, Assembly Bill 361 (AB 361) was signed by Governor Newsom, to allow for the City Council to attend City Council meetings telephonically and for the public to participate in the City Council meeting by electronic means.

Given the health risks associated with COVID-19, state and local officials are recommending measures to promote social distancing; therefore, the City of Aliso Viejo will not have the Council Chambers open to the public for this meeting. Members of the public may access the meeting live using any of the following sources:

- Cox Communications Channel 851
- AT&T U-Verse Channel 99
- Online at www.avcity.org
- Online at https://attendee.gotowebinar.com/register/7447245562998740493

Public comments may be submitted by calling (949) 425-2509 to leave a recorded message by 4:00 pm on the day of the meeting or via email to Community-Input@avcity.org. Alternatively, public comments may be submitted by logging onto the meeting through this link and using the "Raise Hand" feature: https://attendee.gotowebinar.com/register/7447245562998740493. Comments are limited to three minutes each.

WELCOME to the City of Aliso Viejo City Council meeting.

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 preceding a regularly scheduled City Council meeting. Supplemental documents relating to specific agenda items, including communications received after agenda delivery, are presented to the City Council and are 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 participating in 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 UVerse Channel 99, and can be viewed on the internet at www.avcity.org.

DAVID A. DOYLE	SCOTT C. SMITH	MITZI ORTIZ
CITY MANAGER	CITY ATTORNEY	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. FEATURED BUSINESS OF THE MONTH - ALISO VIEJO CERTIFIED FARMERS' MARKET
Certificate of Recognition

1.2. MOULTON NIGUEL WATER DISTRICT PRESENTATION REGARDING DROUGHT & DISTRICT UPDATES

1.3. RECOGNITION OF 2021 MAYOR TIFFANY ACKLEY

2. ADDITIONS, DELETIONS, REORDERING TO THE AGENDA:

3. COMMUNITY INPUT:

Members of the public wishing to address the City Council can submit public comments by calling (949) 425-2509 to leave a recorded by 4:00 pm on the day of the meeting or via email to Community-Input@avcity.org. Written comments will be read into the record and recorded messages will be aired during the meeting. Alternatively, public comments may be submitted by logging onto the meeting through this link and using the "Raise Hand" feature: https://attendee.gotowebinar.com/register/7447245562998740493. Comments are limited to three (3) minutes each. 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.

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. RESOLUTION EXTENSION AUTHORIZING VIRTUAL CITY COUNCIL MEETINGS PURSUANT TO ASSEMBLY BILL 361

Recommended Action: Move to reconfirm findings under Assembly Bill 361 and extend Resolution No. 2021-27 to continue virtual City Council meetings.

Staff Report

Attachment 1 - Resolution No. 2021-27

4.3. APPROVAL OF MINUTES

Recommended Action: Approve the Minutes as submitted for the December 1, 2021 Regular Meeting.

Draft Minutes - December 1, 2021 Regular Meeting

4.4. ACCOUNTS PAYABLE

Recommended Action:

1. Ratify accounts payable checks and electronic funds transfers issued November 23, 2021, in the amount of $358,685.11;
2. Ratify accounts payable checks and electronic funds transfers issued December 09, 2021, in the amount of $1,162,500.30; and
3. Ratify accounts payable checks and electronic funds transfers issued December 22, 2021, in the amount of $394,056.84.

Staff Report

Attachment 1 - Accounts Payable Report

4.5. TREASURER'S STATEMENT – OCTOBER 2021

Recommended Action: Approve October 2021 Treasurer's Statement.

Staff Report

Attachment 1 - Oct'21 Treasurer's Report

4.6. ANNUAL COMPREHENSIVE FINANCIAL REPORT (ACFR)

Recommended Action: Receive and file the Annual Comprehensive Financial Report (ACFR) for the year ended June 30, 2021.

Staff Report

Attachment 1 - ACFR Report

4.7. RESOLUTION APPROVING THE ISSUANCE BY THE CALIFORNIA MUNICIPAL FINANCE AUTHORITY OF THE PORTION OF REVENUE BONDS THE PROCEEDS OF WHICH ARE TO BE LOANED TO QCF/I, INC., A 501(c)(3) NONPROFIT HEALTHCARE ORGANIZATION, AND USED TO ACQUIRE THE EXISTING FACILITY LOCATED AT 200 FREEDOM LANE, ALISO, VIEJO, CALIFORNIA; AND APPROVING CERTAIN OTHER MATTERS RELATING THERETO

Recommended Action: Adopt a Resolution approving the issuance by the California Municipal Finance Authority of the portion of revenue bonds the proceeds of which are to be loaned to QCF/I, Inc., a 501(c)(3) nonprofit healthcare organization, and used to acquire the existing facility located at 200 Freedom Lane, Aliso, Viejo, California; and approving certain other matters relating thereto.

Staff Report

Attachment 1 - Resolution

4.8. FIFTH AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT WITH KOSMONT & ASSOCIATES, INC. FOR ECONOMIC DEVELOPMENT CONSULTANT SERVICES

Recommended Action: Approve and authorize the City Manager to execute a Fifth Amendment to the Professional Services Agreement with Kosmont & Associates, Inc. for economic development consultant services to increase the total compensation by an amount not to exceed $12,000 and extend the term of the agreement to June 30, 2022.

Staff Report

Attachment 1 - Agreement Amendment

Attachment 2 - Proposal

4.9. FIRST AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT WITH MIKE LINARES, INC. FOR COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) PROGRAM ADMINISTRATION FOR FY 2021-2022

Recommended Action: Approve and authorize the City Manager to execute the First Amendment to the Professional Services Agreement with Mike Linares, Inc. for Community Development Block Program (CDBG) Program administration for FY 2021-22.

Staff Report

Attachment 1 - Agreement Amendment

4.10. THIRD AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT WITH BECKY CAHA FOR AFFORDABLE HOUSING IMPLEMENTATION SERVICES

Recommended Action: Approve and authorize City Manager to execute a Third Amendment to the Professional Services Agreement with Becky Caha, independent contractor, to increase the amount of the existing agreement.
Staff Report
Attachment 1 - Agreement Amendment
Attachment 2 - Scope of Services

5. PUBLIC HEARINGS:

5.1. PLANNING APPLICATION PA21-016 (SDP/AUP/EP) FOR A SITE DEVELOPMENT PERMIT TO DEMOLISH AN EXISTING BUILDING AND CONSTRUCT A NEW RESTAURANT WITH A DRIVE-THRU; AN ADMINISTRATIVE USE PERMIT FOR OUTDOOR DINING; AND AN EXCEPTION PERMIT FOR A PARKING DEFICIENCY BELOW 15% AT 26641 ALISO CREEK ROAD

Recommended Action:

1. Open and conduct a public hearing;
2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Section 15302 (Replacement or Reconstruction); and
3. Adopt a Resolution making findings under the California Environmental Quality Act and approving Planning Application PA21-016 (SDP/AUP/EP) for a site development permit to demolish an existing building and construct a new restaurant with a drive-thru; an administrative use permit for outdoor dining; and an exception permit for a parking deficiency below 15% at 26641 Aliso Creek Road.

Staff Report
Attachment 1 - Resolution
Attachment 2 - Project Description
Attachment 3 - Project Plans
Attachment 4 - CEQA Analysis
Attachment 5 - Traffic Circulation Analysis
Attachment 6 - Presentation

5.2. REQUEST TO APPROVE PLANNING APPLICATION PA21-014 (SDP) FOR A SITE DEVELOPMENT PERMIT TO ALLOW FOR EXTERIOR MODIFICATIONS TO THE BUILDING AND PARKING LOT, INCLUDING REDESIGN OF THE PRIMARY BUILDING ELEVATION, UPGRADES TO LANDSCAPING, AND ADJUSTMENTS TO THE PARKING LOT TO SATISFY ACCESSIBILITY REQUIREMENTS, AT 7 JOURNEY AND DETERMINATION THAT PROJECT IS CATEGORICALLY EXEMPT FROM CEQA.

Recommended Action:

1. Open and conduct a public hearing;
2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15301 (Existing Facilities); and
3. Adopt a Resolution approving Planning Application PA21-0174 (SDP) for a site development permit to allow for exterior modifications to the building and parking lot, including redesign of the primary building elevation, upgrades to landscaping, and adjustments to the parking lot to satisfy accessibility requirements, at 7 Journey.

Staff Report
Attachment 1 - Resolution
Attachment 2 - Project Description
Attachment 3 - Project Plans
Attachment 4 - Presentation

5.3. GENERAL PLAN AMENDMENT PA21-019 (GPA) - HOUSING ELEMENT

Recommended Action:

1. Open and conduct a public hearing;
2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15061(b)(3) (Common Sense Exemption); and
3. Adopt a Resolution making findings under the California Environmental Quality Act and approving Planning Application PA21-019 (GPA) approving a general plan amendment to adopt the 2021-2029 Housing Element Update.

Staff Report
Attachment 1 - Resolution
Exhibit A - Housing Plan
Exhibit B - Community Profile
Exhibit C - HCD Comments and City Responses
Attachment 2 - Letter from HCD
Attachment 3 - Letters from the Public
Attachment 4 - City's Response to Public Comments
Attachment 5 - Presentation

6. DISCUSSION:

6.1. ACCEPTANCE OF DONATED SCULPTURE FROM ARTIST JON SEEMAN FOR PLACEMENT AT ALISO VIEJO RANCH

Recommended Action:

1. Accept donation of sculpture from artist Jon Seeman for placement at Aliso Viejo Ranch; and
2. Appropriate funds from General Fund Reserves and authorize City Manager to approve expenditures not to exceed $2,000 for related installation costs.

Staff Report
Attachment 1 - Proposed Sculpture

6.2. RESOLUTION AMENDING CITY EMPLOYEE SALARY SCHEDULE TO MODIFY EXISTING POSITION AND ADD NEW HUMAN RESOURCES ANALYST POSITION

Recommended Action: Adopt a Resolution amending City employee salary schedule to modify existing position and add new Human Resources Analyst position.

Staff Report
Attachment 1 - Resolution
Attachment 2 - Salary Schedule
Attachment 3 - HR Analyst Job Description

7. CITY MANAGER' S REPORT:

8. ANNOUNCEMENTS / COUNCIL COMMENTS / COMMITTEE UPDATES:

9. ADJOURNMENT:

Adjourn to February 16, 2022. The regularly scheduled City Council meeting of February 2, 2022 has been cancelled.

Certificate of Recognition

Presented to

ALISO VIEJO CERTIFIED FARMERS' MARKET

Aliso Viejo
Business of the Month
January 2022

Presented this 19th day of January, 2022

Ross Chun, Mayor

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Mitzi Ortiz, Director of Government Services

SUBJECT: RESOLUTION EXTENSION AUTHORIZING VIRTUAL CITY COUNCIL MEETINGS PURSUANT TO ASSEMBLY BILL 361

Recommended Action:

Move to reconfirm findings under Assembly Bill 361 and extend Resolution No. 2021-27 to continue virtual City Council meetings.

Fiscal Impact:

None.

Background:

Assembly Bill 361 ("AB 361"), effective October 1, 2021, waives certain provisions of the Ralph M. Brown Act and allows legislative bodies to meet virtually until January 1, 2024, provided there is a state of emergency and either:

1. state or local officials have imposed or recommended measures to promote social distancing; or
2. the legislative body determines by majority vote that meeting in person would present imminent risks to the health and safety of attendees.

Under AB 361, the City is not required to allow public access at teleconference locations; however, the City must provide access to meetings via a call-in option or internet-based service option so that members of the public may address the City Council in real time. Additionally, every 30 days the City Council must reconsider the state of emergency and make the determination to continue meeting virtually in accordance with AB 361.

Discussion:

On October 20, 2021, the City Council adopted Resolution No. 2021-27 authorizing virtual City Council meetings under AB 361, having found and determined that (1) a state of emergency related to COVID-19 is currently in effect; (2) state and local officials have

recommended measures to promote social distancing in connection with COVID-19; and (3) due to the COVID-19 emergency, meeting in person would present imminent risks to the health and safety of attendees. At subsequent meetings, the City Council has reconfirmed the findings and extended the resolution pursuant to AB 361.

Staff will agendize this matter for consideration at each City Council meeting until such time as the state of emergency has been terminated or the City Council determines that conditions no longer exist to prevent meeting safely in person.

Staff recommends that the City Council reconfirm the findings in Resolution No. 2021-27 continue to exist and approve the extension of the resolution.

Attachment:

1. Resolution No. 2021-27

RESOLUTION NO. 2021-27

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, CALIFORNIA, AUTHORIZING VIRTUAL CITY COUNCIL MEETINGS PURSUANT TO ASSEMBLY BILL 361

WHEREAS, the Aliso Viejo City Council ("Council") is committed to preserving and nurturing public access and participation in meetings of the Council; and

WHEREAS, with the exception of closed sessions, all meetings of the Council are open and public, as required by the Ralph M. Brown Act (Cal. Gov. Code 54950 – 54963), so that any member of the public may attend and participate in the Council's meetings; and

WHEREAS, starting in March 2020, in response to the spread of COVID-19 in the State of California, the Governor issued a number of executive orders aimed at containing theCOVID-19 virus; and

WHEREAS, among other things, these orders waived certain requirements of the BrownAct to allow legislative bodies to meet virtually; and

WHEREAS, pursuant to the Governor's executive orders, the Council has been holding virtual meetings during the pandemic in the interest of protecting the health and safety ofthe public, staff, and Councilmembers; and

WHEREAS, the Governor's executive order related to the suspension of certain provisions of the Brown Act expires on September 30, 2021; and

WHEREAS, on September 16, 2021 the Governor signed Assembly Bill 361 (in effect asof October 1, 2021 – Government Code Section 54953(e)), which allows legislative bodies to meet virtually provided there is a state of emergency, and either (1) state or local officials have imposed or recommended measures to promote social distancing; or (2) the legislative body determines by majority vote that meeting in person would presentimminent risks to the health and safety of attendees; and

WHEREAS, such conditions now exist in Orange County, specifically, a state of emergency has been proclaimed related to COVID-19, state and local officials are recommending measures to promote social distancing, and because of the ongoing threatof COVID-19, meeting in person would present imminent risks to the health and safety of attendees;

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

Section 1. Recitals. The Recitals set forth above are true and correct and areincorporated into this Resolution by this reference.

Section 2. Remote Teleconference Meetings. Consistent with the provisions of Government Code Section 54953(e), the Council finds and determines that (1) a state ofemergency related to COVID-19 is currently in effect; (2) state and local officials have recommended measures to promote social distancing in connection with COVID-19; and (3) due to the COVID-19 emergency, meeting in person would present imminent risks to the health and safety of attendees. Based on such facts, findings and determinations, the Council authorizes staff to conduct remote teleconference meetings of the Council under the provisions of Government Code Section 54953(e).

Section 3. Effective Date of Resolution. This Resolution shall take effect upon adoption and shall be effective for 30 days unless earlier extended by a majority vote of the Council in accordance with Section 4 of this Resolution.

Section 4. Extension by Motion. The Council may extend the application of this Resolution by motion and majority vote by up to 30 days at a time, provided that it makes all necessary findings consistent with and pursuant to the requirements of Section 54953(e)(3).

PASSED, APPROVED AND ADOPTED this 20th day of October, 2021.

Tiffany Ackley
Mayor

APPROVED AS TO FORM:

Scott C. Smith
City Attorney

ATTEST:

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 foregoing Resolution No. 2021-27 was duly passed and adopted by the City Council of the City of Aliso Viejo at their regular meeting held on the 20th day of October 2021, by the following roll call vote, to wit:

AYES: Mayor Ackley, Mayor Pro Tem Chun, Councilmembers Harrington, Hurt and Munzing

NOES: None

ABSENT: None

MITZI ORTIZ, MMC
CITY CLERK

(SEAL)

CITY OF ALISO VIEJO
CITY COUNCIL MINUTES
REGULAR MEETING
December 1, 2021, 7:00 P.M.
Council Chambers, City Hall, 12 Journey
Aliso Viejo, California

City Council conducted this meeting in accordance with California Government Code Section 54953(e)(2) and COVID-19 pandemic protocols.

CALL TO ORDER: Mayor Ackley called the Regular Meeting of the City Council of the City of Aliso Viejo to order at 7:00 p.m.

ROLL CALL:

PRESENT: MAYOR TIFFANY ACKLEY *(via teleconference)*
MAYOR PRO TEM ROSS CHUN *(via teleconference)*
COUNCILMEMBER DAVID C. HARRINGTON *(via teleconference)*
COUNCILMEMBER RICHARD W. HURT *(via teleconference)*
COUNCILMEMBER MIKE MUNZING *(via teleconference)* (ARRIVED AT 7:06 PM)

ABSENT: NONE

STAFF PRESENT: DAVID A. DOYLE, CITY MANAGER
SCOTT C. SMITH, CITY ATTORNEY
MITZI ORTIZ, CITY CLERK
PAUL ESPINOZA, INTERIM ADMINISTRATIVE SERVICES DIRECTOR
SHAUN PELLETIER, PUBLIC WORKS DIRECTOR
OMAR DADABHOY, COMMUNITY DEVELOPMENT DIRECTOR
LIZZY MENDOZA, ACTING RECREATION & COMMUNITY SERVICES DIRECTOR
ISAAC AZIZ, INFORMATION TECHNOLOGY MANAGER
CAPT. CHAD KAJFASZ, CHIEF OF POLICE SERVICES

PLEDGE OF ALLEGIANCE: City Clerk Mitzi Ortiz led the pledge of allegiance.

1. SPECIAL PRESENTATIONS:

None.

2. ADDITIONS, DELETIONS, REORDERING TO THE AGENDA:

None.

3. COMMUNITY INPUT:

City Clerk Mitzi Ortiz entered the following communications into the record:

1. Carolyn Adamich expressed opposition to Consent Calendar Item 4.2.
2. Lou Ann Hughes expressed concern with the condition of the local dog park.
3. Tricia Portugal expressed concern with the condition of the local dog park.
4. Darren and Jessica Siegrist expressed concern with the condition of the local dog park.

4. CONSENT CALENDAR:

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

Motion: Councilmember Harrington moved and Mayor Pro Tem Chun seconded to approve the recommended actions. Motion carried 5-0.

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. RESOLUTION EXTENSION AUTHORIZING VIRTUAL CITY COUNCIL MEETINGS PURSUANT TO ASSEMBLY BILL 361

Recommended Action: Move to reconfirm findings under Assembly Bill 361 and extend Resolution No. 2021-27 to continue virtual City Council meetings.

4.3. APPROVAL OF MINUTES

Recommended Action: Approve the Minutes as submitted for the November 17, 2021 Special Meeting and the November 17, 2021 Regular Meeting.

4.4. ACCOUNTS PAYABLE

Recommended Action: Ratify accounts payable checks and electronic funds transfers issued November 10, 2021 in the amount of $1,333,240.50.

4.5. TREASURER'S STATEMENT – SEPTEMBER 2021

Recommended Action: Approve September 2021 Treasurer's Statement.

4.6. ANNUAL MEASURE M2 EXPENDITURE REPORT

Recommended Action: Approve Resolution No. 22021-31 to adopt the FY 2020-21 M2 Expenditure Report.

4.7. 800 MHZ COUNTYWIDE COORDINATED COMMUNICATION SYSTEM (CCCS)

Recommended Action: Approve and authorize the City Manager to execute the Amendment of the Joint Use Agreement for operation, maintenance, and financial management of the Orange County 800 MHz CCCS.

4.8. AGREEMENT WITH AKINS IT, FOR THE DESIGN AND IMPLEMENTATION OF A VIDEO SURVEILLANCE SYSTEM FOR THE ALISO VIEJO RANCH AND RECEIPT OF PROPOSITION 68 PER CAPITA GRANT FUNDS

City Manager David Doyle responded to questions regarding public safety access to surveillance videos.

Recommended Action:
1. Approve a Professional Services Agreement with Akins IT for the design and implementation of a video surveillance system at the Aliso Viejo Ranch for an amount not to exceed $98,000.00; and
2. Authorize the City Manager to execute said agreement with Akins IT and amend the FY 2021-22 adopted budget for the receipt of Proposition 68 Per Capita Grant funds.

Motion: Councilmember Harrington moved and Councilmember Munzing seconded to approve the recommended actions. Motion carried 5-0.

4.9. AGREEMENT WITH WESTERN AUDIO VISUAL FOR THE INSTALLATION OF AUDIO AND VIDEO EQUIPMENT AT THE ALISO VIEJO RANCH

City Manager David Doyle and IT Manager Isaac Aziz responded to questions regarding scope of project.

Recommended Action: Approve and authorize the City Manager to execute a Professional Services Agreement with Western Audio Visual for the installation of audio and video equipment at the Aliso Viejo Ranch in an amount not to exceed $148,500.

Motion: Councilmember Harrington moved and Councilmember Hurt seconded to approve the recommended actions. Motion carried 5-0.

4.10. SETTLEMENT AGREEMENTS WITH DISTRIBUTORS OF OPIOIDS, AMERISOURCE BERGEN, CARDINAL HEALTH, AND MCKESSON, AND OPIOID MANUFACTURER JANSSEN (OWNED BY JOHNSON & JOHNSON)

Recommended Action:
1. Opt into settlement agreement with opioid distributors, Amerisource Bergen, Cardinal Health, and Mckesson, whereby the County of Orange will receive the City's designated share of settlement funds, and direct the City Manager to execute any documents necessary to implement the action; and
2. Opt into settlement agreement with opioid manufacturer, Janssen (owned by Johnson & Johnson), whereby the County of Orange will receive the City's designated share of the settlement funds, and direct the City Manager to execute any documents necessary to implement the action.

5. PUBLIC HEARINGS:

None.

6. DISCUSSION:

6.1. CONSIDERATION OF BALLOT MEASURE FOR NOVEMBER 8, 2022 GENERAL MUNICIPAL ELECTION FOR THE ADOPTION OF AN ORDINANCE ESTABLISHING TERM LIMITS FOR MEMBERS OF THE CITY COUNCIL (ACKLEY)

Mayor Ackley provided an overview. Council discussion ensued. City Attorney Scott Smith provided additional information.

Recommended Action: Adopt Resolution No. 2021-32 of the City Council of the City of Aliso Viejo, California Submitting to the Qualified Voters of the City an Ordinance Amending the Aliso Viejo Municipal Code to Add Section 2.04.125 Regarding Councilmember Term Limits at the Regular Municipal Election to be Consolidated with the Statewide General Election to be Held on November 8, 2022.

Motion: Mayor Ackley moved and Councilmember Hurt seconded to approve the recommended actions. Motion carried 4-1, with Councilmember Munzing dissenting.

6.2. CITY COUNCIL REORGANIZATION

Recommended Action: Select a Mayor and Mayor Pro Tem in accordance with Ordinance No. 2001-022, for the 2022 calendar year.

City Clerk Mitzi Ortiz provided the staff report and opened the floor to accept nominations for Mayor. Mayor Ackley nominated Mayor Pro Tem Chun. There were no further nominations for Mayor and Ms. Ortiz closed the floor for nominations.

Motion: Nomination of Mayor Pro Tem Chun to serve as Mayor for 2022. Motion carried 5-0.

City Clerk Mitzi Ortiz opened the floor to accept nominations for Mayor Pro Tem. Councilmember Munzing nominated Councilmember Hurt. There were no further nominations for Mayor Pro Tem and Ms. Ortiz closed the floor for nominations.

Motion: Nomination of Councilmember Hurt to serve as Mayor Pro Tem for 2022. Motion carried 5-0.

6.3. CITY COUNCIL APPOINTMENTS TO SERVE ON REGIONAL BOARDS, COMMISSIONS AND COMMITTEES

City Clerk Mitzi Ortiz presented the staff report.

Recommended Action:

1. Review and update Council appointment list to regional boards, commissions, and committees; and
2. If needed, adopt Resolution 2021-33 designating and appointing the City's representative to the Orange County Fire Authority Board of Directors.

Motion: Mayor Ackley moved and Mayor Pro Tem Chun seconded to approve the appointment list as presented. Motion carried 5-0.

7. CITY MANAGER' S REPORT:

City Manager David Doyle announced All is Bright Holiday Celebration and Tree Lighting Ceremony to be held 5:00-8:00 p.m. on December 2, 2021 at Aliso Viejo Town Center Fountain and Amphitheater; Boys and Girls Club of Capistrano Valley Operation Holiday Homework donation and volunteer opportunities; OCFA Spark of Love Holiday Toy Drive donation opportunities; and closure of The Row at Town Center at the property owner's request.

8. ANNOUNCEMENTS / COUNCIL COMMENTS / COMMITTEE UPDATES:

Councilmember Harrington:

- Received consensus to agendize discussion on filling of City Council vacancies
- Expressed appreciation to staff
- Extended wishes for a happy holiday season

Councilmember Munzing:

- Attended Chabad of Aliso Viejo Chanukah Celebration
- Extended wishes for a happy holiday season

Councilmember Hurt:

- Expressed appreciation to staff
- Expressed appreciation for selection as Mayor Pro Tem
- Extended wishes for a happy holiday season
- Requested announcement from Captain Kajfasz on available mental health resources

Mayor Pro Tem Chun:

- Expressed appreciation to staff
- Attended Orange County Council of Governments General Assembly
- Commented on Pacific Life efforts to support Asian Pacific Islander employees
- Attended Southern California Edison Government Advisory Panel
- Attended Boy Scout Troop 774 event
- Attended Chabad of Aliso Viejo Chanukah Celebration
- Expressed appreciation for selection as Mayor
- Extended wishes for a happy holiday season

DRAFT

Mayor Ackley:

- Expressed appreciation to staff
- Commented on positive working relationship with AVCA
- Attended Chabad of Aliso Viejo Chanukah Celebration
- Congratulated Mayor Pro Tem Chun and Councilmember Hurt on selection as Mayor and Mayor Pro Tem

9. **ADJOURNMENT:** Mayor Ackley adjourned the meeting at 7:50 p.m. to the regularly scheduled meeting of January 19, 2021.

Respectfully submitted:

_____
MITZI ORTIZ, MMC
CITY CLERK

Approved by:

_____
TIFFANY ACKLEY
MAYOR

DRAFT

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Sheryl Mariano, Accounting Supervisor

SUBJECT: ACCOUNTS PAYABLE

Recommended Actions:

1. Ratify accounts payable checks and electronic funds transfers issued November 23, 2021, in the amount of $358,685.11;
2. Ratify accounts payable checks and electronic funds transfers issued December 09, 2021, in the amount of $1,162,500.30; and
3. Ratify accounts payable checks and electronic funds transfers issued December 22, 2021, in the amount of $394,056.84.

Fiscal Impact:

Expenditures in the amount of $1,915,242.25.

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 dated November 23, 2021, through December 22, 2021, for $1,915,242.25 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 audited and deemed accurate by the Accounting Supervisor.

Attachment:

1. Accounts Payable Report

Accounts Payable

11/23/2021

Vendor Name	Description (Item)	Amount
101 - GENERAL FUND		
UNITED OF OMAHA LIFE INSURANCE CO.	DEC'21 LIFE INSURANCE	1,236.13
CALPERS HEALTH	DEC'21 CALPERS HEALTH PREMIUM	25,941.73
CALPERS HEALTH	DEC'21-COUNCIL-CALPERS HEALTH PREMIUM	3,080.94
CHOICE BUILDER	DEC'21 DENTAL INSURANCE	2,488.18
CHOICE BUILDER	DEC'21 VISION INSURANCE	373.48
DIVISION OF THE STATE ARCHITECT	JUL-SEP'21 CASP FEES	101.20
SEAN BOND	P#21-0934-C&D REFUND-SEAN BOND/15 SPRUCEWOOD	500.00
IE INC	P#21-1085-CANCELED PERMIT REFUND-IE/14 HILLROSE	38.38
IE INC	P#21-1085-CANCELED PERMIT REFUND-IE/14 HILLROSE	219.64
AVANTI CONSTRUCTION COMPANY	P#21-1150-C&D REFUND-AVANTI CONST/12 BRANDY LANE	500.00
		34,479.68
CITY COUNCIL		
US BANK PURCHASING CARD PROGRAM	PC-DD 11/5 ACC-OC CONF-REGIS	250.00
US BANK PURCHASING CARD PROGRAM	PC-DD 10/12 CAL CITIES CONF-REGIS	725.00
US BANK PURCHASING CARD PROGRAM	PC-RC ICSC "HERE WE GO" EVT-REGIS	50.00
US BANK PURCHASING CARD PROGRAM	PC-TA ICSC "HERE WE GO" EVT-REGIS	50.00
US BANK PURCHASING CARD PROGRAM	PC-TA & RC-ICSC MEMBERSHIP DUES	100.00
	CITY COUNCIL TOTAL:	**1,175.00**
CITY MANAGER		
CALPERS HEALTH	DEC'21-PG-HEALTH PREMIUM	143.00
US BANK PURCHASING CARD PROGRAM	PC-DD ICSC "HERE WE GO" EVT-REGIS	50.00
US BANK PURCHASING CARD PROGRAM	PC-DD ICSC MEMBERSHIP DUES	100.00
	CITY MANAGER TOTAL:	**293.00**
ECONOMIC DEVELOPMENT		
PV MAINTENANCE INC	OCT'21-THE ROW MAINTENANCE	1,833.50
SWA GROUP INC	APR'21 AVTC & THE ROW-PROFESSIONAL SERVICES	6,578.00
SWA GROUP INC	JUL'21 AVTC & THE ROW-PROFESSIONAL SERVICES	2,002.00
	ECONOMIC DEVELOPMENT TOTAL:	**10,413.50**
HUMAN RESOURCES		
US BANK PURCHASING CARD PROGRAM	PC-10/6 CJPIA CONF-BREAKFAST	16.47
US BANK PURCHASING CARD PROGRAM	PC-10/5-10/7 CJPIA CONF-HOTEL	727.50
US BANK PURCHASING CARD PROGRAM	PC-IPMA-HR MEMBERSHIP DUES	156.00
SOUTH COAST MEDICAL GROUP	10/26 EMPLOYEE WELLNESS FLU VACCINES	525.00
	HUMAN RESOURCES TOTAL:	**1,424.97**
FINANCE		
CALPERS HEALTH	DEC'21 CALPERS ADMIN FEE	69.03
CALPERS HEALTH	DEC'21 CALPERS ADMIN FEE	7.70
GARDAWORLD	NOV'21-CH-CASH COURIER SERVICE	371.55
LANCE SOLL LUNGHARD LLP	OCT'21-FIN-INTERIM STAFF-LSL PROFESSIONAL SRV	700.00
ROGERS ANDERSON MALODY & SCOTT LLP	FY20-21 CITY AUDIT & PROGESS BILLING	12,500.00
CHOICE BUILDER	DEC'21 ADMIN FEE	35.00
	FINANCE TOTAL:	**13,683.28**
INFORMATION TECHNOLOGY		
AT&T	10/6-11/5/21 CH-ALARM/POTS LINE	2,603.64
US BANK PURCHASING CARD PROGRAM	IA-EOC YOUTUBE SUBSCRIPTION	64.99
US BANK PURCHASING CARD PROGRAM	IA-10/4 LAPTOP CASE	37.70
US BANK PURCHASING CARD PROGRAM	IA-OCT'21-WAITWHILE SUB-FRONT COUNTER	159.00
US BANK PURCHASING CARD PROGRAM	IA-10/20 CITY COUNCIL EQUIP- USB CABLE	75.40
	INFORMATION TECHNOLOGY TOTAL:	**2,940.73**
NON-DEPARTMENTAL		
CERTIFIED RECORDS MANAGEMENT	NOV'21 RECORDS OFF SITE STORAGE	400.15
PV MAINTENANCE INC	OCT'21 VISTA PARK MAINTENANCE	1,158.00
JOANNA RAMIREZ	JS-11/18 QTRLY LUNCH SUPPLIES-REIMB	21.46
NESTLE WATERS NORTH AMERICA	OCT'21-CH-COFFEE/WATER FILTRATION	45.23

Vendor Name	Description (Item)	Amount
ASSOCIATION OF CALIFORNIA CITIES	FY21-22 ACC-OC ANNUAL MEMBERSHIP DUES	10,857.60
RICOH USA	8/1-10/31/21-RICOH PRO 5200S COPIES	954.50
RICOH USA	10/1-10/31/21-RICOH 2504EX (FRONT COUNTER)-COPIES	162.10
CINTAS CORPORATION NO. 2	NOV'21-CH-FIRST AID MAINTENANCE	293.85
NIEVES LANDSCAPE INC	NOV'21 VISTA PARK LANDSCAPE MAINTENANCE	1,028.96
FEDERAL EXPRESS	CC-11/5/21-AWARDS-FEDEX CHARGES	77.28
US BANK PURCHASING CARD PROGRAM	PC-10/19 COSTCO DELIVERY	245.95
US BANK PURCHASING CARD PROGRAM	PC-10/2 ERC SUPPLIES-AMAZON	72.04
US BANK PURCHASING CARD PROGRAM	PC-10/2 ERC SUPPLIES-TARGET	107.52
US BANK PURCHASING CARD PROGRAM	PC-9/28 NOTHING BUNDT CAKES	66.00
US BANK PURCHASING CARD PROGRAM	PC-10/1 ERC SUPPLIES-TARGET	42.23
US BANK PURCHASING CARD PROGRAM	PC-10/1-ERC SUPPLIES-TARGET	0.01
US BANK PURCHASING CARD PROGRAM	PC-9/30 ERC SUPPLIES- AMAZON	82.32
US BANK PURCHASING CARD PROGRAM	PC-10/20 CC MTG DINNER - URBAN PLATES	84.32
US BANK PURCHASING CARD PROGRAM	PC-9/30-ERC SUPPLIES-TARGET	10.54
US BANK PURCHASING CARD PROGRAM	PC-10/1 ERC SUPPLIES-AMAZON	19.34
US BANK PURCHASING CARD PROGRAM	PC-10/1 ERC SUPPLIES-AMAZON	14.00
US BANK PURCHASING CARD PROGRAM	PC-10/2 ERC SUPPLIES-AMAZON	14.00
US BANK PURCHASING CARD PROGRAM	PC-10/2 ERC SUPPLIES-MICHAELS	40.87
RK BRANDS, LLC	OCT'21-7.97HRS-PIO/MAYOR OUTREACH/SPECIAL PROJ	717.30
ALISO VIEJO SELF STORAGE	DEC'21 RENTAL STORAGE UNIT #535	430.00
ALISO VIEJO SELF STORAGE	DEC'21 RENTAL STORAGE UNIT #519	330.00
	NON-DEPARTMENTAL TOTAL:	**17,275.57**
C. S. ADMINISTRATION		
ALEXANDRA TEEPLES	HOLIDAY ELSA CHARACTER	400.00
M&J PAUL ENTERPRISES INC	REM BAL-12/2/21 TREE LIGHTING EVENT RENTALS	5,861.25
CALPERS HEALTH	DEC'21-DP-HEALTH PREMIUM	143.00
CALPERS HEALTH	DEC'21-HW-HEALTH PREMIUM	143.00
ALLIANT INSURANCE SERVICES INC	12/2 TREE LIGHTING EVENT INSURANCE	513.00
SOLINK INC	100 VETERANS DAY EVENT CARDS	70.04
SPECIAL EVENT CONTRACTORS LLC	REM BAL-2021 HOLIDAY TREE PLATFORM	2,462.00
JONES FOREST PRODUCTS LLC	2021 HOLIDAY TREE DECOR & INSTALL	12,641.00
SOUTH COAST SYMPHONY	FY21-22-CAG-SOUTH COAST SYMPHONY	750.00
THE PINK DAFFODIL, LLC	AVR-VETERAN'S DAY EVT-FLORAL ARRANGEMENTS	375.00
THE KNOT WORLDWIDE INC	11/2/21-11/1/22-WEDDING PRO VENUE MARKETING SRV	5,200.00
	C. S. ADMINISTRATION TOTAL:	**28,558.29**
IGLESIA PARK		
PV MAINTENANCE INC	OCT'21 IGLESIA PARK MAINTENANCE	2,110.90
EL TORO WATER DISTRICT	10/11-11/9/21 MTR #3499 IGLESIA PARK WATER SRV	614.11
EL TORO WATER DISTRICT	10/11-11/9/21 MTR #4114 IGLESIA PARK WATER SRV	539.47
NIEVES LANDSCAPE INC	NOV'21 IGLESIA LANDSCAPE MAINTENANCE	6,846.00
SO CAL EDISON	OCT'21 ACCT#7997 IGLESIA PARK ELECTRICITY	200.10
	IGLESIA PARK TOTAL:	**10,310.58**
IGLESIA BUILDING		
EL TORO WATER DISTRICT	10/11-11/9/21 MTR#1850 IGLESIA BLDG WATER SRV	241.16
MASOUD DODELANDARVAR	9/20-IPCC-GLASS REPLACEMENT	377.13
TEAM ONE MANAGEMENT SERVICES	OCT'21 IPCC-JANITORIAL SERVICE & SUPPLIES	895.48
TEAM ONE MANAGEMENT SERVICES	NOV'21 IPCC-JANITORIAL SERVICE	861.00
CTJAMJT CORP.	NOV'21 IPCC-PEST CONTROL SERVICE	95.00
SO CAL EDISON	OCT'21 ACCT#7997 IGLESIA BLDG ELECTRICITY	615.48
	IGLESIA BUILDING TOTAL:	**3,085.25**
PLANNING		
CALPERS HEALTH	DEC'21-MF-HEALTH PREMIUM	143.00
JENNIFER LOWE	JL-11/1-11/10/21-AVTC MTG SUPPLIES-REIMB	34.84
STAPLES ADVANTAGE	PLNG-OFFICE SUPPLIES	175.89
	PLANNING TOTAL:	**353.73**
BUILDING		
CALIFORNIA BUILDING OFFICIALS	JS-9/10 CA BLDG OFFICIALS TRAINING REGIS	175.00
	BUILDING TOTAL:	**175.00**
ENGINEERING (GENERAL)		
PV MAINTENANCE INC	NOV'21 PUBLIC WORKS WAREHOUSE LEASE	1,035.00
	ENGINEERING (GENERAL) TOTAL:	**1,035.00**

Vendor Name	Description (Item)	Amount
STREET MAINTENANCE		
PV MAINTENANCE INC	OCT'21 STREET MAINTENANCE (45%)	36,292.83
	STREET MAINTENANCE TOTAL:	**36,292.83**
LAW ENFORCEMENT-OTHER		
ALL CITY MANAGEMENT SERVICES	10/17-10/30/21-458 HRS-SCHOOL CROSSING GUARD SRV	11,601.14
	LAW ENFORCEMENT-OTHER TOTAL:	**11,601.14**
ANIMAL CONTROL		
CITY OF MISSION VIEJO	OCT-DEC'21 ANIMAL CARE SERVICES	94,058.87
	ANIMAL CONTROL TOTAL:	**94,058.87**
	GENERAL FUND TOTAL:	**267,156.42**
102 - GEN. FD-CITY HALL		
NON-DEPARTMENTAL		
PV MAINTENANCE INC	OCT'21 CITY HALL MAINTENANCE	834.53
TEAM ONE MANAGEMENT SERVICES	OCT'21 CH-JANITORIAL SERVICE	2,856.00
TEAM ONE MANAGEMENT SERVICES	NOV'21 CH-JANITORIAL SERVICE	2,856.00
FOSTERS' GARDENS INC	NOV'21 CH- PLANT MAINTENANCE	105.00
NIEVES LANDSCAPE INC	NOV'21 CITY HALL LANDSCAPE MAINTENANCE	678.00
WAXIE'S ENTERPRISES, INC	CH-JANITORIAL SUPPLIES-FLOOR LINER	60.08
WAXIE'S ENTERPRISES, INC	CH-JANITORIAL SUPPLIES-MULTIFOLD TOWELS	134.86
WAXIE'S ENTERPRISES, INC	CH-JANITORIAL SUPPLIES	86.54
PACIFIC PARK II ASSOCIATION	DEC'21 CH HOA ASSESSMENT	347.27
	NON-DEPARTMENTAL TOTAL:	**7,958.28**
	GEN. FD-CITY HALL TOTAL:	**7,958.28**
103 - GF-AV RECREATION SERVICES		
RECREATION SERVICES		
CAROLYN LONG	FALL2021-RFC241-POWER YOGA-4 PARTICIPANTS	134.40
PRESS-TIGE ENTERPRISES INC	11/7-AVR LINENS DRY CLEANING SERVICE	374.98
GARDAWORLD	NOV'21-AVR-CASH COURIER SERVICE	371.54
CAROLYN WOJCIECHOWSKI	FALL2021-RFC189/194-LINE DANCING-23 PARTICIPANTS	414.00
JOHN DAVID ALLEN JR	FALL 2021-RFC155-TENNIS-2 PARTICIPANTS	161.20
JENNIFER ANDRUS-NELSON	FALL2021-RFC052-DINING ETIQUETTE-8 PARTICIPANTS	144.00
BREAKTHROUGH SPORTS LLC	FALL 2021-RFC123/124-BASKETBALL-10 PARTICIPANTS	416.00
PRESS-TIGE ENTERPRISES INC	11/12-AVR LINENS DRY CLEANING SERVICE	56.70
PRESS-TIGE ENTERPRISES INC	11/17-AVR LINEN DRY CLEANING SERVICE	377.25
AT&T	10/6-11/5/21 AVR-ALARM/POTS LINE	875.95
CTJAMJT CORP.	NOV'21 AV RANCH PEST CONTROL SERVICE	395.00
DS SERVICES OF AMERICA, INC	8/18 AVR BOTTLED WATER SERVICE	155.32
CAPISTRANO UNIFIED SCHOOL DISTRICT	8/2-8/6/21-CAPO FACILITY PERMIT#11300-AV CLASSES	3.65
CAPISTRANO UNIFIED SCHOOL DISTRICT	8/27/21-CAPO FACILITY PERMIT#12642-AV CLASSES	125.26
FOSTERS' GARDENS INC	NOV'21 AVR- PLANT MAINTENANCE	90.00
RICOH USA	11/1-11/30/21-AVR COPIER SUBSCRIPTION	21.00
CINTAS CORPORATION NO. 2	NOV'21-AVR-FIRST AID MAINTENACE	142.01
NIEVES LANDSCAPE INC	NOV'21 AV RANCH LANDSCAPE MAINTENANCE	2,262.67
COUNTY OF ORANGE	12/1/21-11/30/22 AVR-HCA PERMIT#PR0120598	662.00
SO CAL EDISON	OCT'21 ACCT#4551 FARM ELECTRICITY	704.85
SO CAL EDISON	OCT'21 ACCT#6247 AVR TRACKED CHARGES ELECTRICITY	463.53
SO CAL EDISON	OCT'21 ACCT#6247 AV RANCH ELECTRICITY	2,006.58
	RECREATION SERVICES TOTAL:	**10,357.89**
	GF-AV RECREATION SERVICES TOTAL:	**10,357.89**
203 - GAS TAX		
STREET MAINTENANCE		
PV MAINTENANCE INC	OCT'21 STREET MAINTENANCE (GAS 55%)	44,357.91
EL TORO WATER DISTRICT	10/11-11/9/21MTR #5675 CALLE CORTEZ WATER SERVICE	84.02
R F DICKSON CO INC	OCT'21 STREET SWEEPING SERVICES	8,668.66
NIEVES LANDSCAPE INC	NOV'21 MEDIANS LANDSCAPE MAINTENANCE	1,586.00
SO CAL EDISON	OCT'21 GS1 MEDIANS ELECTRICITY	66.49

Vendor Name	Description (Item)	Amount
SO CAL EDISON	OCT'21 STREET LIGHTS TC1 ELECTRICITY	2,943.22
	STREET MAINTENANCE TOTAL:	**57,706.30**
	GAS TAX TOTAL:	**57,706.30**
215 - PUBLIC SAFETY GRANTS		
LAW ENFORCEMENT-OTHER		
COUNTY OF ORANGE	NOV'21 AFIS	1,958.00
	LAW ENFORCEMENT-OTHER TOTAL:	**1,958.00**
	PUBLIC SAFETY GRANTS TOTAL:	**1,958.00**
225 - INTEGRATED WASTE MGMT FD		
GEN-BEV CONTAINER RECYCLE		
PV MAINTENANCE INC	OCTOBER 2021 IGLESIA PARK TRASH CANS SETUP	520.64
	GEN-BEV CONTAINER RECYCLE TOTAL:	**520.64**
	INTEGRATED WASTE MGMT FD TOTAL:	**520.64**
241 - TECHNOLOGY FUND		
GEN-TECHNOLOGY GRANTS		
ERIC WINTER	OCT'21 CC MTGS & AV SITE VISITS	1,207.00
	GEN-TECHNOLOGY GRANTS TOTAL:	**1,207.00**
	TECHNOLOGY FUND TOTAL:	**1,207.00**
261 - CITY FAC.-AQUATIC CENTER		
PREMIER AQUATIC SERVICES	AQ CTR-JUL-SEP'21 SALES TAX & USE-REIMB	771.43
		771.43
GEN-AQUATIC CENTER		
PREMIER AQUATIC SERVICES	AQ CTR-10/22 RIVETS FOR SWIM PLATFORM-HOMEDEPO	29.73
PREMIER AQUATIC SERVICES	AQ CTR-NOV'21 JACKRABBIT-SWIM LESSONS PROG	220.50
PREMIER AQUATIC SERVICES	AQ CTR-10/29WEIRS/BUOYS/TEST SOLUTIONS-ALPHA WATER	228.07
PREMIER AQUATIC SERVICES	AQ CTR-10/20 PROPANE FOR HEATERS-CHEVRON	47.39
PREMIER AQUATIC SERVICES	AQ CTR-10/19SWIM INSTRUCTOR SPECIAL NEEDS TRAINING	135.00
PREMIER AQUATIC SERVICES	AQ CTR-MONTHLY MANAGER MEETING-F&B	37.56
PREMIER AQUATIC SERVICES	AQ CTR-10/16 SWIM INSTRUCTOR MTG-F&B-BJ'S	113.79
PREMIER AQUATIC SERVICES	AQ CTR-10/19ADD'L SWIM INST SPECIAL NEEDS TRAINING	15.00
PREMIER AQUATIC SERVICES	AQ CTR-10/27 HALLOWEEN CANDY-STATER BROS	24.97
PREMIER AQUATIC SERVICES	AQ CTR-10/25 PUMKINS FOR POOL-TRADER JOE'S	24.84
PREMIER AQUATIC SERVICES	AQ CTR-FALL DECORATIONS-PARTY CITY	35.56
THE GAS COMPANY	10/4-11/3/21 MTR#2349 AQ CTR GAS SERVICE	4,471.13
GARDAWORLD	NOV'21-AQ CTR-CASH COURIER SERVICE	371.54
GREAT SCOTT TREE SERVICE, INC	NOV'21 AQ CTR TREE REMOVAL SRV	345.00
SMART LEVELS MAILING & PRINTING INC	AQ CTR-DISPLAY SIGNAGE	223.59
TEAM ONE MANAGEMENT SERVICES	OCT'21 AQ CTR-JANITORIAL SERVICE	1,239.00
TEAM ONE MANAGEMENT SERVICES	NOV'21 AQ CTR-JANITORIAL SERVICE	1,239.00
NIEVES LANDSCAPE INC	NOV'21 AQ CTR LANDSCAPE MAINTENANCE	912.48
	GEN-AQUATIC CENTER TOTAL:	**9,714.15**
	CITY FAC.-AQUATIC CENTER TOTAL:	**10,485.58**
331 - CAPITAL IMPROVEMENTS		
CAPITAL IMPROVEMENTS		
PV MAINTENANCE INC	OCT'21 AVR-STROM DRAIN CONCRETE BASE	965.00
	CAPITAL IMPROVEMENTS TOTAL:	**965.00**
	CAPITAL IMPROVEMENTS TOTAL:	**965.00**

Vendor Name	Description (Item)	Amount
332 - STORM WATER		
DRAINAGE IMPROVEMENTS		
SIERRA ANALYTICAL LABS INC	NOV'21 #030 WOOD CANYON WETLANDS WQ MONITORING	370.00
	DRAINAGE IMPROVEMENTS TOTAL:	**370.00**
	STORM WATER TOTAL:	**370.00**
	GRAND TOTAL:	**358,685.11**

Accounts Payable

12/09/2021

Vendor Name	Description (Item)	Amount
101 - GENERAL FUND		
CHARLES ABBOTT ASSOC INC	OCT'21 CAA ENG 5004 MNWD	862.65
CHARLES ABBOTT ASSOC INC	OCT'21 ENG 2241/GLAUKOS AV PRKWY-AP ENG & TESTING	420.00
CHARLES ABBOTT ASSOC INC	OCT'21 CAA ENG 5049 COX UTILITY	268.38
CHARLES ABBOTT ASSOC INC	OCT'21 CAA ENG 5060 EL TORO WATER DISTRICT	191.70
CHARLES ABBOTT ASSOC INC	OCT'21 CAA ENG 5002 AT&T	172.53
CHARLES ABBOTT ASSOC INC	OCT'21 CAA ENG 5063 VISTA POINTE RIDGE	115.02
CHARLES ABBOTT ASSOC INC	OCT'21 CAA ENG 5005 SCE - SADDLEBACK	57.51
CHARLES ABBOTT ASSOC INC	OCT'21 CAA-7 COMPUTER STATIONS LEASE CREDIT	(350.00)
KATRIN HORZAD	P#21-1223-C&D REFUND-ALL OC KITCHEN/11 WATER MILL	500.00
		2,237.79
CITY COUNCIL		
US BANK PURCHASING CARD PROGRAM	MO-RC 12/5-12/7/21 ICSC CONFERENCE-HOTEL	236.97
US BANK PURCHASING CARD PROGRAM	LL-RC-12/5-12/7/21 ICSC CONF-AIRFARE	408.96
US BANK PURCHASING CARD PROGRAM	MO-TA 12/5-12/7/21 ICSC CONFERENCE-HOTEL	208.62
US BANK PURCHASING CARD PROGRAM	MO-RC 11/5 ACC-OC LEADERHSIP CONF-REGIS	195.00
US BANK PURCHASING CARD PROGRAM	LL-RC-12/5-12/7/21 ICSC CONF-REGIS	50.00
US BANK PURCHASING CARD PROGRAM	MO-TA3/17-3/20/22 YOSEMITE POLICYMAKERS CONF-REGIS	500.00
US BANK PURCHASING CARD PROGRAM	MO-TA 3/17/22 YOSEMITE POLICYMAKERS CONF-HOTEL	315.82
US BANK PURCHASING CARD PROGRAM	LL-RC-12/5-12/7/21 ICSC CONF-HOTEL	272.12
US BANK PURCHASING CARD PROGRAM	LL-RC FY21-22 ICSC MEMBERSHIP DUES	50.00
	CITY COUNCIL TOTAL:	**2,237.49**
CITY MANAGER		
US BANK PURCHASING CARD PROGRAM	DD-CM TOLL ROADS CHARGES	335.00
US BANK PURCHASING CARD PROGRAM	DD-10/25 STAFF LUNCH/MEETING-OPAH	129.91
US BANK PURCHASING CARD PROGRAM	MO-10/26 OCCMA 2021 HOLIDAY LUNCHEON-REGIS	390.00
US BANK PURCHASING CARD PROGRAM	DD-12/5-12/7 ICSC CONF-HOTEL	180.27
US BANK PURCHASING CARD PROGRAM	DD-12/5-12/7 ICSC CONF-AIRFARE	137.97
US BANK PURCHASING CARD PROGRAM	MO-2/22/22 EVT DEPOSIT-TARPYS ROADHOUSE	1,500.00
STAPLES ADVANTAGE	CM-OFFICE SUPPLIES	113.69
	CITY MANAGER TOTAL:	**2,786.84**
ECONOMIC DEVELOPMENT		
PV MAINTENANCE INC	NOV'21-THE ROW MAINTENANCE-PVM	675.50
MALCO MAINTENANCE	NOV'21-THE ROW-PORTER SERVICE	650.00
	ECONOMIC DEVELOPMENT TOTAL:	**1,325.50**
HUMAN RESOURCES		
US BANK PURCHASING CARD PROGRAM	PC-10/26 EMPLOYEE FLU VACCINE-SUPPLIES	15.97
CHARLES C STILL	KY/SS-SECURE LIVE SCAN	114.00
	HUMAN RESOURCES TOTAL:	**129.97**
CITY CLERK		
STAPLES ADVANTAGE	CC-OFFICE SUPPLIES	59.85
	CITY CLERK TOTAL:	**59.85**
CITY ATTORNEY		
BEST BEST & KRIEGER	OCT'21 BBK CODE ENFORCEMENT	1,522.59
BEST BEST & KRIEGER	OCT'21 BBK LEGAL SERVICES	20,656.41
BEST BEST & KRIEGER	OCT'21 BBK - LABOR & EMPLOYMENT	536.40
BEST BEST & KRIEGER	OCT'21 BBK - LABOR/BENEFITS	3,039.60
BEST BEST & KRIEGER	OCT'21 BBK - #801 TOWN CTR SPECIFIC PLAN	3,085.60
BEST BEST & KRIEGER	OCT'21 BBK - GENERAL LITIGATION	187.20
	CITY ATTORNEY TOTAL:	**29,027.80**
FINANCE		
US BANK PURCHASING CARD PROGRAM	SM-2/16-2/18/22 CSMFO CONF-REGIS	470.00
US BANK PURCHASING CARD PROGRAM	SM-PE-2/16-2/18/22 CSMFO CONF-REGIS	470.00
US BANK PURCHASING CARD PROGRAM	SM-FY21-22 CSMFO MEMBERSHIP DUES	110.00
US BANK PURCHASING CARD PROGRAM	SM-PE-FY21-22 CSMFO MEMBERSHIP DUES	75.00

Vendor Name	Description (Item)	Amount
LANCE SOLL LUNGHARD LLP	NOV'21-FIN-INTERIM STAFF-LSL PROFESSIONAL SRV	525.00
STAPLES ADVANTAGE	FIN-OFFICE SUPPLIES	57.08
	FINANCE TOTAL:	**1,707.08**
INFORMATION TECHNOLOGY		
COX COMMUNICATIONS, INC	11/10-12/9/21 ACCT#0202-CH-TV/CABLE	150.49
COX COMMUNICATIONS, INC	11/6-12/5/21 ACCT #8802-CH-INTERNET	1,500.00
COX COMMUNICATIONS, INC	11/19-12/18/21 ACCT #9302-CH-IT SERVER ROOM	85.39
US BANK PURCHASING CARD PROGRAM	IA-EOC YOUTUBE SUBSCRIPTION	64.99
US BANK PURCHASING CARD PROGRAM	IA-IT SUPPLIES-LABEL TAPE-AMAZON	18.12
US BANK PURCHASING CARD PROGRAM	IA-GODADDY-ALISOVIEJOCONFERENCECENTER.COM	19.17
US BANK PURCHASING CARD PROGRAM	IA-IT SUPPLIES-POWER STRIP-AMAZON	68.75
US BANK PURCHASING CARD PROGRAM	IA-IT SUPPLIES-LABEL TAPE-AMAZON	14.21
US BANK PURCHASING CARD PROGRAM	IA-GODADDY-SSL RENEWAL	94.99
US BANK PURCHASING CARD PROGRAM	IA-GODADDY-ALISOVIEJOFAM..RCENTER.COM	19.17
US BANK PURCHASING CARD PROGRAM	IA-WEBCAM/NETWORK CABLE/MICE/BATTERIES/USB	394.21
US BANK PURCHASING CARD PROGRAM	IA-NOV'21-WAITWHILE SUB-FRONT COUNTER	159.00
US BANK PURCHASING CARD PROGRAM	IA-GODADDY-DOMAIN RENEWAL	99.31
US BANK PURCHASING CARD PROGRAM	DG-11/3 MSA TRAINING & DEVELOPMENT	77.63
NATHAN M KEETER	NOV'21-NETWORK SUPPORT & SECURITY	416.67
AT&T	11/19-12/18/21-CH-AT&T-FIBER-INTERNET	1,115.89
JIVE COMMUNICATIONS INC	DEC'21 CH JIVE VOIP SERVICE & SUPPORT	1,847.86
TANGENT COMPUTERS INC	11/23-12/22/21 CH MICROSOFT 365 E3 LICENSES	2,084.00
	INFORMATION TECHNOLOGY TOTAL:	**8,229.85**
NON-DEPARTMENTAL		
US BANK PURCHASING CARD PROGRAM	SM-11/18 QTRLY LUNCHEON-F&B	847.53
US BANK PURCHASING CARD PROGRAM	PC-11/18 QTRLY LUNCHEON ICE-RALPHS	6.57
US BANK PURCHASING CARD PROGRAM	LL- 11/19 MTG CC DINNER-BEYOND THAI	94.12
US BANK PURCHASING CARD PROGRAM	SM-11/18 QTRLY LUNCHEON GRATUITY	127.00
US BANK PURCHASING CARD PROGRAM	PC-11/3 CC MTG DINNER-URBANE CAFE	112.17
US BANK PURCHASING CARD PROGRAM	PC-11/18 QTRLY LUNCHEON DESSERTS- COSTCO	82.94
US BANK PURCHASING CARD PROGRAM	PC-11/18 QTRLY LUNCHEON BEVERAGES-TARGET	25.16
RICOH USA	12/12-1/11/22 RICOH C5200S LEASE	729.92
NESTLE WATERS NORTH AMERICA	NOV'21-CH-COFFEE/WATER FILTRATION	65.23
JOANNA RAMIREZ	JS-12/4 CH-FALL DECOR SUPPLIES-REIMB	30.71
JOANNA RAMIREZ	JS-12/4 CH-CHRISTMAS TREE SUPPLIES-REIMB	65.51
RICOH USA	10/12-11/11/21 RICOH 2504 BACK OFFICE-COPIES	98.07
CUSTOM ECO FRIENDLY	REM BAL-2500 ALISO VIEJO TOTE BAGS	2,495.00
STAPLES ADVANTAGE	CEN-COPY& BREAK ROOM SUPPLIES	930.86
VOYAGER FLEET SYSTEMS INC	NOV'21 CITY CAR FUEL	201.78
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR#2206 VISTA PARK WATER SERVICE	417.82
VIGICABI INC	VETERAN'SDAY & HOLIDAY BANNERS-INSTAL &REMOVAL SRV	2,693.00
	NON-DEPARTMENTAL TOTAL:	**9,023.39**
C. S. ADMINISTRATION		
JESSICA ALCANTAR	12/2 TREE LIGHTING EVT- PHOTOGRAPHER	550.00
US BANK PURCHASING CARD PROGRAM	JB-12/2 TREE LIGHTING EVT CRAFTS-MICHAELS	71.25
US BANK PURCHASING CARD PROGRAM	JB-12/2 TREE LIGHTING EVT-HATS-HOBBY LOBBY	51.48
US BANK PURCHASING CARD PROGRAM	JB-12/2 TREE LIGHTING EVT CRAFTS-MICHAELS	81.07
US BANK PURCHASING CARD PROGRAM	LM-11/6 HEALTH FAIR VOLUNTEER-COFFEE	35.90
US BANK PURCHASING CARD PROGRAM	JB-12/2 TREE LIGHTING EVT-SANTA SWITCH	5.78
US BANK PURCHASING CARD PROGRAM	LM-12/2 TREE LIGHTING EVT-SUPPLIES-MICHAELS	118.95
US BANK PURCHASING CARD PROGRAM	LM-12/2 TREE LIGHTING EVT- CANDY CANES	335.95
US BANK PURCHASING CARD PROGRAM	LM-SEASONAL DECORATIONS-HOBBY LOBBY	219.09
US BANK PURCHASING CARD PROGRAM	JB-SUPPLIES-TABLE COVERS-AMAZON	21.43
US BANK PURCHASING CARD PROGRAM	JB-SUPPLIES-GLUE DOTS & TAPE-MICHAELS	16.35
M&J PAUL ENTERPRISES INC	ADD'L-12/2 TREE LIGHTING RENTALS	1,615.00
ALLIANT INSURANCE SERVICES INC	12/17 BREAKFAST WITH SANTA EVENT INSURANCE	321.00
	C. S. ADMINISTRATION TOTAL:	**3,443.25**
IGLESIA PARK		
US BANK PURCHASING CARD PROGRAM	DG-IP-PLAYGROUND MAINT/SOCCER NET-FOLD-A-GOAL	517.96
	IGLESIA PARK TOTAL:	**517.96**
IGLESIA BUILDING		
HARBOR POINTE AIR CONDITIONING & CONTROL SYSTEMS, INC	11/10/21 IPCC- HVAC MAINTENANCE	182.85
	IGLESIA BUILDING TOTAL:	**182.85**

Vendor Name	Description (Item)	Amount
PLANNING		
REBECCA J CAHA	NOV'21-12.75HRS-AFFORDABLE HOUSING CONSULTANT SRV	1,275.00
STAPLES ADVANTAGE	PLNG-OFFICE SUPPLIES	13.46
	PLANNING TOTAL:	**1,288.46**
BUILDING		
CHARLES ABBOTT ASSOC INC	OCT'21 CAA BUILDING SERVICES	38,796.24
STAPLES ADVANTAGE	BLDG-OFFICE SUPPLIES	37.25
	BUILDING TOTAL:	**38,833.49**
CODE ENFORCEMENT		
CHARLES ABBOTT ASSOC INC	OCT'21 CAA CODE ENFORCEMENT	7,332.19
	CODE ENFORCEMENT TOTAL:	**7,332.19**
ENGINEERING (GENERAL)		
PV MAINTENANCE INC	DEC'21 PUBLIC WORKS WAREHOUSE LEASE	1,035.00
US BANK PURCHASING CARD PROGRAM	SP-12/6 CEAOC MEETING-REGIS	90.00
US BANK PURCHASING CARD PROGRAM	SP & QL-12/8 APWA BEST AWARDS LUNCHEON-REGIS	170.00
RICHARD FISHER ASSOCIATES	OCT'21 ON CALL LANDSCAPE & ARCHITECTURAL SERVICES	6,773.87
CHARLES ABBOTT ASSOC INC	OCT'21 CAA NPDES COSTS	21,396.80
CHARLES ABBOTT ASSOC INC	OCT'21 CAA SOLID WASTE	2,777.90
CHARLES ABBOTT ASSOC INC	OCT'21 CAA PW ENGINEERING-ADMIN	3,003.46
STAPLES ADVANTAGE	ENG-OFFICE SUPPLIES	64.18
COUNTY OF ORANGE	FY21-22 NPDES WATER QUALITY IMPLEMENTATION	829.81
	ENGINEERING (GENERAL) TOTAL:	**36,141.02**
STREET MAINTENANCE		
PV MAINTENANCE INC	NOV'21 STREET MAINTENANCE (45%)	21,172.49
CHARLES ABBOTT ASSOC INC	OCT'21 CAA STREET MAINTENANCE	20,837.34
CHARLES ABBOTT ASSOC INC	OCT'21 CAA ENCROACHMENT PERMITS	191.70
	STREET MAINTENANCE TOTAL:	**42,201.53**
LAW ENFORCEMENT-CONTRACT		
COUNTY OF ORANGE	DEC'21 LAW ENFORCEMENT	782,783.60
COUNTY OF ORANGE	DEC'21 CONTRACT PAYMENT CREDIT	(1,980.08)
	LAW ENFORCEMENT-CONTRACT TOTAL:	**780,803.52**
LAW ENFORCEMENT-OTHER		
US BANK PURCHASING CARD PROGRAM	BG-CSO-RAV4#4576-TIRE MAINTENANCE	819.65
US BANK PURCHASING CARD PROGRAM	BG-CSO-RAV4#9977-TIRES/BULBS/WIPERS MAINT	611.93
US BANK PURCHASING CARD PROGRAM	CK-11/4 SHERIFF HQ MTG-PARKING	10.00
US BANK PURCHASING CARD PROGRAM	BG-11/2 CITY PATROL TRAINING-F&B	160.82
US BANK PURCHASING CARD PROGRAM	BG-SHERIFF-10 BLACK HATS	161.63
US BANK PURCHASING CARD PROGRAM	BG-LE SPECIAL EVT EQUIP-FLASHLIGHTS	1,756.50
ALISO VIEJO BANQUET CENTER LLC	LE-1/23/22 DEPUTY APPRECIATION BREAKFAST EVENT	788.73
VOYAGER FLEET SYSTEMS INC	NOV'21 MOTORCYCLE FUEL & CAR WASHES	558.60
	LAW ENFORCEMENT-OTHER TOTAL:	**4,867.86**
CRIME PREVENTION		
US BANK PURCHASING CARD PROGRAM	BG-PALS EQUIP/ FLASHLIGHT FOR VEHICLE	160.55
STAPLES ADVANTAGE	CP-OFFICE SUPPLIES	43.93
CREATIVE SERVICES OF NEW ENGLAND	LE-5000 JUNIOR DEPUTY BADGE STICKERS	443.95
	CRIME PREVENTION TOTAL:	**648.43**
EOC		
LIFE STORAGE #961	12/14-1/14/22-RENTAL OFFSITE STORAGE #A1554	250.00
	EOC TOTAL:	**250.00**
	GENERAL FUND TOTAL:	**973,276.12**

102 - GEN. FD-CITY HALL

NON-DEPARTMENTAL		
US BANK PURCHASING CARD PROGRAM	DG-CITY HALL- REPAIRS & MAINT	251.80
JMG SECURITY SYSTEMS INC	JAN-MAR'22-CH-FIRE ALARM MONITORING	339.12
JMG SECURITY SYSTEMS INC	JAN-MAR'22-CH-ELEVATOR MONITORING	176.91
HARBOR POINTE AIR CONDITIONING & CONTROL SYSTEMS, INC	CREDIT MEMO-DUPLICATE PAYMENT	(758.59)
THURSTON ELEVATOR CONCEPTS INC	DEC'21 CH-ELEVATOR MAINTENANCE	131.00
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR#8510 CITY HALL WATER SRV	181.46
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR#6010 CITY HALL WATER SRV	133.35
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR#7051 CITY HALL WATER SRV	281.54
HARBOR POINTE AIR CONDITIONING & CONTROL SYSTEMS, INC	SEP'21-CH- HVAC-TSTAT RELOCATION SRV	289.16

Vendor Name	Description (Item)	Amount
HARBOR POINTE AIR CONDITIONING & CONTROL SYSTEMS, INC	11/1/21 CH- HVAC MAINTENANCE	1,786.65
	NON-DEPARTMENTAL TOTAL:	**2,812.40**
	GEN. FD-CITY HALL TOTAL:	**2,812.40**

103 - GF-AV RECREATION SERVICES

RECREATION SERVICES

PV MAINTENANCE INC	NOV'21 AV RANCH MAINTENANCE	386.00
US BANK PURCHASING CARD PROGRAM	LM-"WHEN TO WORK" ANNUAL SUBSCRIPTION	200.00
US BANK PURCHASING CARD PROGRAM	DG- AVR-REPAIRS & MAINT-SUPPLIES	286.65
US BANK PURCHASING CARD PROGRAM	LM-AVR SUPPLIES-12 OZ CUPS	42.22
SKYHAWKS SPORTS ACADEMY, INC	FALL21-RFC216-BASKETBALL-5PARTICIPANTS	338.00
EASTWOOD POWER WASH	NOV'21 AVR POWER WASHING SERVICE	389.00
TIMOTHY DANA BOWEN	FALL21-RFC040-PLAY-WELL TEKNOLOGIES-8 PARTICIPANTS	336.00
DS SERVICES OF AMERICA, INC	10/24 AVR BOTTLED WATER SERVICE	42.52
LYONS SECURITY SERVICE IN	OCT'21-112.25HRS-SECURITY SRV-FACILITY RESERVATION	2,929.73
PEAK LIGHTING & ELECTRIC INC	NOV'21-AVR-LIGHTING MAINTENANCE	199.00
WAXIE'S ENTERPRISES, INC	AV RANCH JANITORIAL SUPPLIES-GUM REMOVER	187.95
TEAM ONE MANAGEMENT SERVICES	NOV'21 AV RANCH JANITORIAL SERVICE	5,520.00
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR #0819 AV RANCH WATER SRV	1,900.24
MOULTON NIGUEL WATER DIST	10/25-11/22/21 MTR#1100 AV RANCH WATER SERVICE	134.39
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR#5356 AV RANCH WATER SRV	281.54
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR#7892/6534 AV RANCH WATER SRV	546.58
MOULTON NIGUEL WATER DIST	10/25-11/22/21 MTR #0958 AV RANCH WATER SERVICE	116.46
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR #0973 AV RANCH WATER SERVICE	86.28
JIVE COMMUNICATIONS INC	DEC'21 AVR JIVE VOIP SERVICE & SUPPORT	613.86
TANGENT COMPUTERS INC	11/23-12/22/21 AVR MICROSOFT 365 E3 LICENSES	387.00
	RECREATION SERVICES TOTAL:	**14,923.42**
	GF-AV RECREATION SERVICES TOTAL:	**14,923.42**

203 - GAS TAX

TRAFFIC ENGINEERING

HARTZOG & CRABILL INC	SEP'21 TRAFFIC SIGNAL MONITORING	2,538.08
HARTZOG & CRABILL INC	OCT'21 TRAFFIC SIGNAL MONITORING	1,775.53
	TRAFFIC ENGINEERING TOTAL:	**4,313.61**

STREET MAINTENANCE

PV MAINTENANCE INC	NOV'21 STREET MAINTENANCE (GAS 55%)	25,877.49
UNDERGROUND SERVICE ALERT OF SOUTHERN CA	DEC'21 DATABASE MAINT & 26 TICKETS	52.90
BEAR ELECTRICAL SOLUTIONS INC	OCT'21 TRAFFIC SIGNAL MONITORING-ROUTINE	3,162.60
BEAR ELECTRICAL SOLUTIONS INC	OCT'21 TRAFFIC SIGNAL MONITORING-RESPONSE	4,548.02
MOULTON NIGUEL WATER DIST	10/25-11/22/21 MTR #4551 MEDIANS WATER SRV	105.05
MOULTON NIGUEL WATER DIST	10/25-11/22/21 MTR#6544 MEDIANS WATER SRV	112.70
MOULTON NIGUEL WATER DIST	10/25-11/22/21 MTR #2066 MEDIANS WATER SRV	81.75
SO CAL EDISON	NOV'21 STREET LIGHTS LS2 ELECTRICITY	1,086.15
SO CAL EDISON	NOV'21 STREET LIGHTS LS1 ELECTRICITY	15,245.15
SAN DIEGO GAS & ELECTRIC	OCT'21 ACCT#6953 ST LIGHTS & TRAFFIC CONTROLLERS	1,875.66
	STREET MAINTENANCE TOTAL:	**52,147.47**
	GAS TAX TOTAL:	**56,461.08**

215 - PUBLIC SAFETY GRANTS

LAW ENFORCEMENT-OTHER

US BANK PURCHASING CARD PROGRAM	BG-LE SPECIAL EVT EQUIP-FLASHLIGHTS	3,200.00
DDL TRAFFIC INC	LE-MOTORCYCLE OPTICOM EMITTER	1,212.19
COUNTY OF ORANGE	DEC'21 MOTORCYCLE REPLACEMENT COSTS	64.60
COUNTY OF ORANGE	DEC'21 E CITATION RECURRING COSTS	384.97
COUNTY OF ORANGE	DEC'21 MDC RECURRING	4,011.56
COUNTY OF ORANGE	DEC'21 PVS REPLACEMENT	1,136.46
COUNTY OF ORANGE	DEC'21 MDC REPLACEMENT	1,627.11
COUNTY OF ORANGE	FY 21-22 PVS RECURRING	1,838.97
COUNTY OF ORANGE	DEC'21 E CITATION REPLACEMENT COSTS	183.56
	LAW ENFORCEMENT-OTHER TOTAL:	**13,659.42**
	PUBLIC SAFETY GRANTS TOTAL:	**13,659.42**

Vendor Name	Description (Item)	Amount
261 - CITY FAC.-AQUATIC CENTER		
PREMIER AQUATIC SERVICES	DEC'21-AQ CTR-RETENTION FEES	(1,625.00)
		-1,625.00
GEN-AQUATIC CENTER		
COX COMMUNICATIONS, INC	11/19-12/18/21 ACCT #6701-AQ CTR-INTERNET	495.76
PREMIER AQUATIC SERVICES	AQ CTR-11/10 POSTAGE FOR BROKEN WALKIES W/WARRANTY	16.88
PREMIER AQUATIC SERVICES	AQ CTR-11/11 MIRRORS & FLOATS-PARENT&ME CLASS-AMAZ	50.80
PREMIER AQUATIC SERVICES	AQ CTR-11/12 SWIM INSTRUCTOR P&M SKILLS TRAINING	15.84
PREMIER AQUATIC SERVICES	AQ CTR-OCT'21 LIFEGUARD HIRING- FACEBOOK AD	336.23
PREMIER AQUATIC SERVICES	AQ CTR-OCT'21 LIFEGUARD HIRING-GOOGLE AD	571.00
PREMIER AQUATIC SERVICES	AQ CTR-11/1 FOOD DRIVE BINS-SUPPLIES-WALMART	41.88
US BANK PURCHASING CARD PROGRAM	DG- AQ CTR-REPAIRS & MAINT-SUPPLIES	16.53
US BANK PURCHASING CARD PROGRAM	DG- AQ CTR-REPAIRS & MAINT-SUPPLIES	25.58
CTJAMJT CORP.	NOV'21 AQ CTR PEST CONTROL SERVICE	185.00
PREMIER AQUATIC SERVICES	DEC'21-AQ CTR-MANAGEMENT FEES	10,833.33
PEAK LIGHTING & ELECTRIC INC	NOV'21-AQ CTR-LIGHTING MAINTENANCE	147.70
SMART LEVELS MAILING & PRINTING INC	AQ CTR-LIFEGUARD EAP-HIP PACK WATERPROOF CARDS	157.32
SAREEN INC	AQ CTR-MELODEE ICE CREAM-FOOD & BEV	661.60
STAPLES ADVANTAGE	AQ CTR-OFFICE SUPPLIES	115.83
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR #6054 AQ CTR WATER SERVICE	291.69
MOULTON NIGUEL WATER DIST	10/18-11/15/21 MTR#2996 AQ CTR WATER SRV	195.51
HARBOR POINTE AIR CONDITIONING & CONTROL SYSTEMS, INC	11/10/21 AQ CTR- HVAC MAINTENANCE	248.89
ALISO VIEJO BANQUET CENTER LLC	JUL-SEP'21-AQ CTR-MTR#4987 ELECTRICITY	7,428.55
KNORR SYSTEMS INC	NOV'21-AQ CTR-CHLORINE PUMP REPAIR	247.96
KNORR SYSTEMS INC	OCT'21 AQ CTR-MONTHLY POOL MAINTENANCE	1,792.64
STGSD, INC	AQ CTR-SWIM GOOGLES	287.64
	GEN-AQUATIC CENTER TOTAL:	**24,164.16**
	CITY FAC.-AQUATIC CENTER TOTAL:	**22,539.16**
311 - STREET IMPROVEMENTS		
STREETS & HIGHWAYS		
CIVIL SOURCE, AN NV5 COMPANY	OCT'21 #133 SLURRY SEAL INSPECTIONS	4,950.00
	STREETS & HIGHWAYS TOTAL:	**4,950.00**
	STREET IMPROVEMENTS TOTAL:	**4,950.00**
332 - STORM WATER		
DRAINAGE IMPROVEMENTS		
PV MAINTENANCE INC	NOV'21 #091 DAIRY FORK WETLAND MAINT-RIPRAP PROJ	11,047.00
	DRAINAGE IMPROVEMENTS TOTAL:	**11,047.00**
	STORM WATER TOTAL:	**11,047.00**
741 - RENEWABLE FARMS		
AARON FLORA	NOV'21 RENEWABLE FARMS-RETENTION PAYMENT	(3,670.50)
AARON FLORA	NOV'21 RENEWABLE FARMS-PAYMENT	36,705.00
AARON FLORA	OCT'21 RENEWABLE FARMS-RETENTION PAYMENT	(3,310.80)
AARON FLORA	OCT'21 RENEWABLE FARMS-PAYMENT	33,178.00
AARON FLORA	OCT'21-ADJ-CHARGEBACK-JACAB CHESS	(70.00)
		62,831.70
	RENEWABLE FARMS TOTAL:	**62,831.70**
	GRAND TOTAL:	**1,162,500.30**

Accounts Payable

12/22/2021

Vendor Name	Description (Item)	Amount
101 - GENERAL FUND		
UNITED OF OMAHA LIFE INSURANCE CO.	JAN'22 LIFE INSURANCE	1,236.13
US BANK PURCHASING CARD PROGRAM	SL-11/11 AMAZON-CITY CREDIT CARD CHRG	449.04
CALPERS HEALTH	JAN'22 CALPERS HEALTH PREMIUM	27,755.70
CALPERS HEALTH	JAN'22-COUNCIL-CALPERS HEALTH PREMIUM	3,247.69
RJM DESIGN GROUP INC	NOV'21 ENG 2240/20 ENTERPRISE FINAL WALK	481.80
CHOICE BUILDER	JAN'22 DENTAL INSURANCE	2,488.18
CHOICE BUILDER	JAN'22 VISION INSURANCE	373.48
KINNEY'S KEYS	STOP PMT CK#31567 ZETTEL MARTIN	(25.00)
		36,007.02
CITY MANAGER		
CALPERS HEALTH	JAN'22-PG-HEALTH PREMIUM	149.00
	CITY MANAGER TOTAL:	**149.00**
ECONOMIC DEVELOPMENT		
HAULAWAY STORAGE CONTAINERS INC	DEC'21-AVTC- STORAGE BIN RENTAL C-19-R2	92.40
	ECONOMIC DEVELOPMENT TOTAL:	**92.40**
CITY ATTORNEY		
BEST BEST & KRIEGER	NOV'21 BBK LEGAL SERVICES	17,167.08
BEST BEST & KRIEGER	NOV'21 BBK CODE ENFORCEMENT	5,011.92
BEST BEST & KRIEGER	NOV'21 BBK-CELLULAR/SMALL CELL WIRELESS FACILITY	604.20
BEST BEST & KRIEGER	NOV'21 BBK LABOR & EMPLOYMENT	1,728.40
BEST BEST & KRIEGER	NOV'21 BBK - LABOR/BENEFITS	4,589.20
BEST BEST & KRIEGER	NOV'21 BBK - ZONING CODE (CEQA & ENVIRON)	119.20
BEST BEST & KRIEGER	NOV'21 BBK - #801 TOWN CTR SPECIFIC PLAN	6,476.40
	CITY ATTORNEY TOTAL:	**35,696.40**
FINANCE		
CALPERS HEALTH	JAN'22 CALPERS ADMIN FEE	73.62
CALPERS HEALTH	JAN'22 CALPERS ADMIN FEE	8.12
GARDAWORLD	DEC'21-CH-CASH COURIER SERVICE	371.55
PARS	SEP'21 PARS REP FEES	300.00
PARS	OCT'21 PARS REP FEES	300.00
ROGERS ANDERSON MALODY & SCOTT LLP	FY20-21 GANN LIMIT REVIEW REPORT	600.00
ROGERS ANDERSON MALODY & SCOTT LLP	FY20-21 CITY AUDIT FINAL BILLING	5,500.00
CHOICE BUILDER	JAN'22 ADMIN FEE	35.00
US BANK N.A. - CUSTODY	NOV'21 CUSTODIAN CHARGES	140.75
HINDERLITER DE LLAMAS & ASSOCIATES	OCT-DEC'21 SALES TAX CONTRACT SERVICE	1,527.98
HINDERLITER DE LLAMAS & ASSOCIATES	OCT-DEC'21 SALES TAX AUDIT SERVICE	244.80
	FINANCE TOTAL:	**9,101.82**
INFORMATION TECHNOLOGY		
GO LIVE TECHNOLOGY INC	SEP'21 ELM & ASSET MGMT IMPLEMENTATION	6,480.00
GO LIVE TECHNOLOGY INC	OCT'21 ELM & ASSET MGMT IMPLEMENTATION	6,480.00
JOSE RUEL FABELLA DIRA	10/8-10/30/21 ENERGOV & GIS SUPPORT	1,500.00
JOSE RUEL FABELLA DIRA	10/19-11/15/21 ENERGOV & GIS SUPPORT	1,600.00
SHI INTERNATIONAL CORP	FY21-22 CH-PATCH MANAGEMENT	1,600.00
SHI INTERNATIONAL CORP	FY21-22-CH-SOLARWINDS ENGINEER'S TOOLSET	458.00
TANGENT COMPUTERS INC	11/25/20 CITY HALL SHAREPOINT TRAINING	2,800.00
LUNAVI, INC	DEC'21 OFFSITE BACKUP STORAGE SERVICE-ZERTO	1,638.78
	INFORMATION TECHNOLOGY TOTAL:	**22,556.78**
NON-DEPARTMENTAL		
CERTIFIED RECORDS MANAGEMENT	DEC'21 RECORDS OFF SITE STORAGE	453.25
STEPHANIE LARSON	SL-12/9 HOLIDAY LUNCH-SUPPLIES REIMB	5.39
J&M TROPHIES INC	REC-H.NGUYEN & M.MEDINA-NAMETAGS	20.15
J&M TROPHIES INC	REC-J.STUART & M.CASTILLO-NAMETAGS	20.15
RICOH USA	5/1-5/31/21 RICOH 2504EX FRONT COUNTER-COPIES	171.33
RICOH USA	11/1-11/30/21 RICOH 2504EX FRONT COUNTER-COPIES	135.14

Vendor Name	Description (Item)	Amount
CINTAS CORPORATION NO. 2	DEC'21 CH FIRST AID MAINTENANCE	179.42
NIEVES LANDSCAPE INC	DEC'21 VISTA PARK LANDSCAPE MAINTENANCE	1,028.96
ALISO VIEJO SELF STORAGE	JAN'22 RENTAL STORAGE UNIT #519	330.00
	NON-DEPARTMENTAL TOTAL:	**2,343.79**
C. S. ADMINISTRATION		
PV MAINTENANCE INC	TREE LIGHTING EVENT-PVM SUPPORT	2,490.23
US BANK PURCHASING CARD PROGRAM	NL-11/5 HEALTH FAIR EVT SNACKS-SMART & FINAL	44.83
US BANK PURCHASING CARD PROGRAM	NL-11/9 TREE LIGHTING EVENT SUPPLIES-HOBBY LOBBY	171.03
US BANK PURCHASING CARD PROGRAM	NL-11/18 TREE LIGHTING EVENT SUPPLIES-AMAZON	70.84
US BANK PURCHASING CARD PROGRAM	NL-10/30 TREE LIGHTING EVENT SUPPLIES-MICHALES	12.96
US BANK PURCHASING CARD PROGRAM	NL-11/20 TREE LIGHTING SUPPLIES-MICHAELS	8.60
US BANK PURCHASING CARD PROGRAM	NL-11/19 BREAKFAST W/SANTA EVT TABLE COVERS-AMAZON	53.86
US BANK PURCHASING CARD PROGRAM	NL-11/20 BREAKFAST W/SANTA EVT TABLE COVERS-AMAZON	26.93
US BANK PURCHASING CARD PROGRAM	NL-10/21 STAFF LED WORKSHOP- FOOD FOR PARTICIPANTS	83.98
US BANK PURCHASING CARD PROGRAM	NL-11/17 HEALTH FAIR EVENT SUPPLIES-SMART & FINAL	49.90
US BANK PURCHASING CARD PROGRAM	NL-175 VETERANS PINS- THE PIN CENTER	383.75
CALPERS HEALTH	JAN'22-DP-HEALTH PREMIUM	149.00
CALPERS HEALTH	JAN'22-HW-HEALTH PREMIUM	149.00
M&J PAUL ENTERPRISES INC	12/17 BREAKFAST WITH SANTA EVT RENTAL SERVICES	3,495.00
WESTAMERICA COMMUNICATIONS INC	25,000 WINTER 2021 BROCHURE PRINTING	19,182.38
PREMIER PRINT SOURCE	AV LOGO TABLE CLOTHS	443.53
RED SWAG INC	150 -15OZ GLASSES -PROMO GIVEAWAY FOR EXPO EVT	830.42
CANYON CATERING & EVENTS INC	12/7 BREAKFAST WITH SANTA EVT-FOOD SERVICE	1,352.14
PARENTS FOR ALISO NIGUEL	FY21-22-CAG-PARENTS FOR ALISO NIGUEL	1,000.00
LAURA'S HOUSE	FY21-22-COMMUNITY ASSISTANCE GRANT-LAURA'S HOUSE	2,250.00
	C. S. ADMINISTRATION TOTAL:	**32,248.38**
IGLESIA PARK		
PV MAINTENANCE INC	NOV'21 IGLESIA PARK MAINTENANCE	2,622.81
EL TORO WATER DISTRICT	11/9-12/9/21 MTR #3499 IGLESIA PARK WATER SRV	564.35
EL TORO WATER DISTRICT	11/9-12/9/21 MTR #4114 IGLESIA PARK WATER SRV	502.15
NIEVES LANDSCAPE INC	DEC'21 IGLESIA PARK LANDSCAPE MAINTENANCE	6,846.00
SO CAL EDISON	NOV'21 ACCT#7997 IGLESIA PARK ELECTRICITY	239.32
	IGLESIA PARK TOTAL:	**10,774.63**
IGLESIA BUILDING		
EL TORO WATER DISTRICT	11/9-12/9/21 MTR#1850 IGLESIA BLDG WATER SRV	241.16
PROTECTION ONE ALARM MONITORING INC	12/17-1/16/22 IPCC- ALARM MONITORING SERVICE	50.00
TEAM ONE MANAGEMENT SERVICES	DEC'21 IPCC-JANITORIAL SERVICE	861.00
TMR SECURITY & PATROL SERVICES INC	NOV'21-IPCC-18 VISITS-PATROL SERVICE	190.00
CTJAMJT CORP.	DEC'21 IPCC-PEST CONTROL SERVICE	95.00
PEAK LIGHTING & ELECTRIC INC	DEC'21-IPCC-LIGHTING MAINTENANCE	701.98
SO CAL EDISON	NOV'21 ACCT#7997 IGLESIA BLDG ELECTRICITY	691.55
	IGLESIA BUILDING TOTAL:	**2,830.69**
IGLESIA PARK COMMUNITY CENTER		
BOYS & GIRLS CLUB OF CAPISTRANO VALLEY	OCT'21 B&G CAPO- ELEMENTARY & TEEN KEYSTONE PROG	16,013.52
	IGLESIA PARK COMMUNITY CENTER TOTAL:	**16,013.52**
PLANNING		
US BANK PURCHASING CARD PROGRAM	OD-12/5-12/7 ICSC CONF REGISTRATION	50.00
US BANK PURCHASING CARD PROGRAM	OD-12/5-12/7 ICSC CONF AIRFARE	117.96
US BANK PURCHASING CARD PROGRAM	OD-AVTC-NOV'21 CONSTANT CONTACT-EMAIL MARKETING	45.00
CALPERS HEALTH	JAN'22-MF-HEALTH PREMIUM	149.00
OMAR DADABHOY	OD-12/7 ICSC CONF-UBER REIMB	16.14
OMAR DADABHOY	OD-12/7 ICSC CONF-UBER REIMB	14.14
FEDERAL EXPRESS	PLNG-10/29-K.MOSSE-FEDEX CHARGES	52.48
FEDERAL EXPRESS	PLNG-11/23-FEDEX CHARGES	34.61
	PLANNING TOTAL:	**479.33**
ENGINEERING (GENERAL)		
CALIFORNIA NEWPAPER PARTNERSHIP	11/25-PUBLIC NOTICE ADP OF ORD-SOLID WASTE	1,692.00
RICHARD FISHER ASSOCIATES	NOV'21 ON CALL LANDSCAPE & ARCHITECTURAL SERVICES	5,012.03
COUNTY OF ORANGE	FY21-22 NPDES COST SHARE AGMT# D02-048	104,512.99
	ENGINEERING (GENERAL) TOTAL:	**111,217.02**
LAW ENFORCEMENT-OTHER		
DAVID YANNIZZI	DY-12/10/21 - 107 FAA UAG AIRCRAFT TEST-REIMB	175.00
ERIC GIUMMO	LE-11/20TACTICAL ADHESIVE/TINT-DEPUTY CAR-REIMB	280.00

Vendor Name	Description (Item)	Amount
SEAVCO INC	LE BMW VIN#3962- LEVEL 2 SERVICING	1,849.18
J&M TROPHIES INC	BRASS PLATE FOR DEP OF THE YEAR PLAQUE	17.24
J&M TROPHIES INC	RECOGNITION AWARD FOR APPRECIATION BREAKFAST	118.53
ALL CITY MANAGEMENT SERVICES	10/31-11/13/21-352HRS-SCHOOL CROSSING GUARD SRV	8,916.16
ALL CITY MANAGEMENT SERVICES	11/14-11/27/21-230 HRS-SCHOOL CROSSING GUARD SRV	5,825.90
	LAW ENFORCEMENT-OTHER TOTAL:	**17,182.01**
CRIME PREVENTION		
US BANK PURCHASING CARD PROGRAM	SL-11/15 PEN CLIPBOARD HOLDER-AMAZON	62.24
US BANK PURCHASING CARD PROGRAM	SL-CRIME PREVHOLIDAY CUP SLEEVES-TREE LIGHTING EVT	222.23
US BANK PURCHASING CARD PROGRAM	SL-ICS BAG VESTS-ALL SAFE INDUSTRIES	235.34
US BANK PURCHASING CARD PROGRAM	SL-10/23 ICS BAG- AMAZON	14.00
	CRIME PREVENTION TOTAL:	**533.81**
EOC		
US BANK PURCHASING CARD PROGRAM	SL-OC EMER MANAGERS HOLIDAY MTG/LUNCH REGIS	40.00
US BANK PURCHASING CARD PROGRAM	SL-EVACUATION MANAGER KITS-PEN HOLDERS	23.68
US BANK PURCHASING CARD PROGRAM	SL-EVACUATION MANAGER KITS - VESTS	44.75
US BANK PURCHASING CARD PROGRAM	SL-10/28 EVACUATION MANAGER KITS-AMAZON	103.74
	EOC TOTAL:	**212.17**
	GENERAL FUND TOTAL:	**297,438.77**

102 - GEN. FD-CITY HALL

NON-DEPARTMENTAL

THE GAS COMPANY	11/2-12/3/21 MTR#6544 CITY HALL GAS SERVICE	410.32
TEAM ONE MANAGEMENT SERVICES	DEC'21 CH-JANITORIAL & CARPET CLEANING SERVICE	3,596.00
CTJAMJT CORP.	DEC'21 CH- PEST CONTROL SERVICE	100.00
AYANTRA INC	JAN-DEC'22-CH-ANNUAL GENERATOR MONITORING	240.00
NIEVES LANDSCAPE INC	DEC'21 CITY HALL LANDSCAPE MAINTENANCE	678.00
WAXIE'S ENTERPRISES, INC	DEC'21 CH-JANITORIAL SUPPLIES	350.81
ALISO VIEJO COMMUNITY ASSOCIATION	FY21-22-AVCA-3RD QTR 35 PLAYA HOA FEES	94.64
ALISO VIEJO COMMUNITY ASSOCIATION	FY21-22-AVCA-3RD QTR-CITY HALL HOA DUES	1,503.39
SO CAL EDISON	NOV'21 ACCT#7189 CITY HALL ELECTRICITY	5,282.27
KINNEY'S KEYS	REISSUE CK-OCT'21 CH REKEYING SRV	2,805.44
	NON-DEPARTMENTAL TOTAL:	**15,060.87**
	GEN. FD-CITY HALL TOTAL:	**15,060.87**

103 - GF-AV RECREATION SERVICES

RECREATION SERVICES

ELIZABETH DRAY PLUMB	FALL2021-RFC263/264-KINDERGARTEN READINESS-25 PART	6,000.00
TUMBLE-N-KIDS, INC	FALL2021-RFC064/033-GYMNASTICS-10PARTICIPANTS	966.00
KIANA BERKMAN	FALL2021-RFC231/222-HOMEWORK CLUB-2PARTICIPANTS	224.00
TLP EDUCATION LLC	FALL2021-RFC103-1 PARTICIPANT/CLASS CANCEL AFTER	12.60
EVER AFTER EVENT PRODUCTIONS LLC	FALL21-RFC015/057/058/010/013/060-OC DANCE-28 PART	1,781.40
US BANK PURCHASING CARD PROGRAM	NL-11/19 BRKRM SUPPLIES VINEGAR-RALPHS	1.17
US BANK PURCHASING CARD PROGRAM	NL-11/12 ENVELOPES-STAPLES	15.48
US BANK PURCHASING CARD PROGRAM	NL-11/17 LOBBY DECORATIONS-MICHAELS	150.84
US BANK PURCHASING CARD PROGRAM	NL-10/22 CAMERA SUPPLIES-AMAZON	62.25
US BANK PURCHASING CARD PROGRAM	NL-11/20 CABLE CORDS FOR LOBBY-AMAZON	15.07
BETTER LIFE HEALTH INC	FALL2021-RFC098-SENIOR CARDIO-2 PARTICIPANTS	108.00
SKYHAWKS SPORTS ACADEMY, INC	FALL2021-RFC199/200/202/210-SOCCER-26 PART	1,620.30
GARDAWORLD	DEC'21-AVR-CASH COURIER SERVICE	371.54
ROXANNE BELL	FALL21-RFC092/083/079/080-BALLET-6PARTICIPANTS	364.00
CAROLYN LONG	FALL2021-RFC243-POWER YOGA-3PARTICIPANTS	100.80
MUSIC MOVES ACADEMY INC	FALL2021 - RFC006/007/005-31PARTICIPANTS	483.00
PRESS-TIGE ENTERPRISES INC	12/3-AVR LINEN DRY CLEANING SERVICE	536.00
BEST INTERIORS, INC	OCT'21 AVRANCH "BLDG H" PANELS	2,000.00
JENNIFER ANDRUS-NELSON	FALL21-RFC053-DINNING ETIQUETTE-6 PARTICIPANTS	108.00
CTJAMJT CORP.	DEC'21 AVR PEST CONTROL SERVICE PO#5498	395.00
LYONS SECURITY SERVICE IN	NOV'21-71 HRS-SECURITY SRV-FACILITY RESERVATION	1,853.10
RICOH USA	12/1-12/31/21-AVR COPIER SUBSCRIPTION	21.00
CINTAS CORPORATION NO. 2	DEC'21-AVR-FIRST AID MAINTENANCE	153.31
NIEVES LANDSCAPE INC	DEC'21 AV RANCH LANDSCAPE MAINTENANCE	2,262.67
CAROLYN WOJCIECHOWSKI	FALL2021-RFC195/196/190/191-LINE DANCE-31 PART	414.00
STAPLES ADVANTAGE	AVR- OFFICE SUPPLIES	210.77

Vendor Name	Description (Item)	Amount
SHI INTERNATIONAL CORP	NOV'21-NOV'25 AVR SERVER SUPPORT	190.00
SO CAL EDISON	NOV'21 ACCT#4551 FARM ELECTRICITY	681.84
SO CAL EDISON	NOV'21 ACCT#6247 AV RANCH TRACKED CHARGES	775.81
SO CAL EDISON	NOV'21 ACCT#6247 AV RANCH ELECTRICITY	2,214.98
	RECREATION SERVICES TOTAL:	**24,092.93**
	GF-AV RECREATION SERVICES TOTAL:	**24,092.93**

203 - GAS TAX

TRAFFIC ENGINEERING

NICHOLS CONSULTING ENGINEERS, CHTD	NOV'21 PAVEMENT MANAGEMENT PLAN UPDATE	1,505.00
	TRAFFIC ENGINEERING TOTAL:	**1,505.00**

STREET MAINTENANCE

EL TORO WATER DISTRICT	11/9-12/9/21 MTR #5675 CALLE CORTEZ WATER SERVICE	87.13
BEAR ELECTRICAL SOLUTIONS INC	NOV'21 TRAFFIC SIGNAL MONITORING-RESPONSE	2,684.74
BEAR ELECTRICAL SOLUTIONS INC	NOV'21 TRAFFIC SIGNAL MONITORING-ROUTINE	3,162.60
R F DICKSON CO INC	NOV'21 STREET SWEEPING SERVICES	8,668.66
NIEVES LANDSCAPE INC	DEC'21 MEDIANS LANDSCAPE MAINTENANCE	1,586.00
SO CAL EDISON	NOV'21 GS1 MEDIANS ELECTRICITY	72.13
SO CAL EDISON	NOV'21 STREET LIGHTS TC1 ELECTRICITY	3,365.77
	STREET MAINTENANCE TOTAL:	**19,627.03**
	GAS TAX TOTAL:	**21,132.03**

215 - PUBLIC SAFETY GRANTS

LAW ENFORCEMENT-OTHER

COUNTY OF ORANGE	DEC'21 AFIS	1,958.00
	LAW ENFORCEMENT-OTHER TOTAL:	**1,958.00**
	PUBLIC SAFETY GRANTS TOTAL:	**1,958.00**

241 - TECHNOLOGY FUND

GEN-TECHNOLOGY GRANTS

ERIC WINTER	NOV'21 CC MTG & SITE VISITS	1,011.00
	GEN-TECHNOLOGY GRANTS TOTAL:	**1,011.00**
	TECHNOLOGY FUND TOTAL:	**1,011.00**

261 - CITY FAC.-AQUATIC CENTER

GEN-AQUATIC CENTER

GARDAWORLD	DEC'21-AQ CTR-CASH COURIER SERVICE	371.54
PREMIER AQUATIC SERVICES	AQ CTR-NOV'21 WATER POLO CONTRACT INSTRUCTOR PMT	763.98
PREMIER AQUATIC SERVICES	AQ CTR-DEC'21 JACKRABBIT-SWIM LESSON PROGRAM	220.50
PREMIER AQUATIC SERVICES	AQ CTR-11/19 SWIM INSTRUCTOR SPECIAL NEEDS TRAININ	15.00
PREMIER AQUATIC SERVICES	AQ CTR-11/27-SWIM INSTRUCTOR SP NEEDS TRAINING	30.00
PREMIER AQUATIC SERVICES	AQ CTR-11/19-ADMIN IN SERVICE- MTG F&B	71.65
PREMIER AQUATIC SERVICES	AQ CTR-NOV'21 SWIM INSTRUCTOR HIRING-FACEBOOK	422.50
PREMIER AQUATIC SERVICES	AQ CTR-NOV'21 AVAC LIFE GUARD HIRING-FACEBOOKS AD	422.17
PREMIER AQUATIC SERVICES	AQ CTR-NOV'21 YR ROUNG LIFE GUARD HIRING-FACEBOOK	143.92
PREMIER AQUATIC SERVICES	AQ CTR-NOV'21 LIFE GUARD HIRING-GOOGLE	456.00
PREMIER AQUATIC SERVICES	AQ CTR-11/19 HOLIDAY DECOR-PARTY CITY	39.54
THE GAS COMPANY	11/3-12/6/21 MTR#2349 AQ CTR GAS SERVICE	3,868.11
GREAT SCOTT TREE SERVICE, INC	NOV'21 AQ CTR- TREE TRIMMING SERVICE	3,822.00
CTJAMJT CORP.	DEC'21 AQ CTR PEST CONTROL SERVICE	185.00
TEAM ONE MANAGEMENT SERVICES	DEC'21 AQ CTR-JANITORIAL SERVICE	1,239.00
KYOCERA DOCUMENT SOLUTIONS WEST, LLC	2 AQ CTR- HP LAPTOPS	2,000.01
NIEVES LANDSCAPE INC	DEC'21 AQ CTR LANDSCAPE MAINTENANCE	912.48
THE ILLINI COMPANIES, INC	NOV'21 AQ CTR-POOL CHEMICALS	442.08
KNORR SYSTEMS INC	NOV'21 AQ CTR-MONTHLY POOL MAINTENANCE	1,792.64
	GEN-AQUATIC CENTER TOTAL:	**17,218.12**
	CITY FAC.-AQUATIC CENTER TOTAL:	**17,218.12**

311 - STREET IMPROVEMENTS

STREETS & HIGHWAYS

CIVIL SOURCE, AN NV5 COMPANY	NOV'21 #133 SLURRY SEAL INSPECTIONS	1,515.00

Vendor Name	Description (Item)	Amount
ENGINEERING RESOURCES OF SOUTHERN CALIFORNIA	NOV'21ALISO CREEK REHAB DESIGN	2,882.00
	STREETS & HIGHWAYS TOTAL:	**4,397.00**
	STREET IMPROVEMENTS TOTAL:	**4,397.00**

331 - CAPITAL IMPROVEMENTS

CAPITAL IMPROVEMENTS

TYLER TECHNOLOGIES-INCODE DIVISION	10/25-11/1/21 ENERGOV ELM IMPLEMENTATION	1,378.12
THIRTIETH STREET ARCHITECTS INC	AUG-NOV'21 #049 AVR ADD'L ARCHT SRV & EXHIBITS	10,000.00
	CAPITAL IMPROVEMENTS TOTAL:	**11,378.12**
	CAPITAL IMPROVEMENTS TOTAL:	**11,378.12**

332 - STORM WATER

DRAINAGE IMPROVEMENTS

SIERRA ANALYTICAL LABS INC	DEC'21 #091 DAIRY FORK WQ MONITORING	370.00
	DRAINAGE IMPROVEMENTS TOTAL:	**370.00**
	STORM WATER TOTAL:	**370.00**

GRAND TOTAL: 394,056.84

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2021

TO: Mayor and City Council

FROM: Sheryl Mariano, Accounting Supervisor

SUBJECT: TREASURER'S STATEMENT – OCTOBER 2021

Recommended Action:

Approve October 2021 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 and approval. 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 (CD), Medium Term Notes, US Treasury bonds, Federal Agency (Government Sponsored Enterprises (GSE)) bonds, Corporate Notes (CN), and Local Agency Investment Fund (LAIF). All funds invested with LAIF are available for withdrawal within 24 hours.

With Proposition 1A, the State does not have the ability to borrow from funds invested in LAIF. CD's are insured by Federal Deposit Insurance Corporation (FDIC). FDIC is an independent agency created by Congress in 1933 to supervise banks, insure deposits, and help maintain a stable and sound banking system. Investments in agencies are backed by the implied guarantee of the U.S. government. All CN's purchased are rated "AA" or better by a nationally recognized rating agency.

Interest is credited to the City's bank account on a monthly basis. All deposits in excess of FDIC insurance limits are collateralized by the financial institution in accordance with government codes.

Fund transfers for capital projects and reimbursement of fiscal charges for the CFD 2005-01 are completed on a quarterly basis. Street improvements include payments for the Pacific Park Rehabilitation & Slurry Seal projects and are funded with Measure M and SB 1 funds. COP Capital provides funding for the AV Ranch project and is funded by Bond proceeds, General fund and Development Impact funds.

Attachment:

1. Oct'21 Treasurer's Statement

CITY OF ALISO VIEJO
TREASURER'S MONTHLY CASH STATEMENT

October 31, 2021

	BEGINNING BALANCE	RECEIPTS	DISBURSEMENTS	TRANSFERS IN (OUT)	ENDING BALANCE	
GENERAL FUND	$ 9,361,353.13	$ 1,661,660.09	$ 1,844,265.15	$ -	$ 9,178,748.07	
TCRF	$ 89,428.86	-			89,428.86	
GAS TAX FUND	$ 878,678.60	-	81,618.90	-	797,059.70	
MEASURE M	$ 662,906.64	-	-	-	662,906.64	
SB1-RMRA	$ (45,269.03)	93,579.45		-	48,310.42	
PUBLIC SAFETY GRANTS	$ 132,837.09	26,424.96	15,261.23		144,000.82	(1)
AIR QUALITY IMPRVMNT FD	$ 1,016,714.86	-			1,016,714.86	
INTEGRATED WASTE MGMT FD	$ 17,462.38	-			17,462.38	
OTHER GRANTS	$ (38,332.68)				(38,332.68)	
TECHNOLOGY GRANT	$ 144,746.62	3,863.38	5,754.94		142,855.06	
DEVELOPMENT IMPACT	$ 1,410,622.33				1,410,622.33	
FEDERAL GRANTS	$ 2,846,994.11	-		-	2,846,994.11	
CITY FACILITY - AV CTR	$ 179,758.92				179,758.92	
CITY FACILITY - AQUATIC CTR	$ 220,163.87	50,057.00	171,783.82		98,437.05	
STREET IMPROVEMENTS	$ 112,974.80	-	57,987.15	-	54,987.65	(2)
CAPITAL IMPROVEMENTS	$ -	-	1,466.69	-	(1,466.69)	(2)
STORM WATER	$ -		13,367.50	-	(13,367.50)	(2)
COP CAPITAL	$ -				-	(2)
COP	$ (4,959.70)	0.30	-		(4,959.40)	
AV RANCH FOUNDATION	$ -				-	
CFD 2005-01	$ (583.83)	109.13	2,129.98		(2,604.68)	
RENEWABLE FARMS	$ 45,520.00	36,973.00	38,020.00		44,473.00	
COMMUNITY TRUST	$ 10,609.68				10,609.68	
TOTALS	**$ 17,041,626.65**	**$ 1,872,667.31**	**$ 2,231,655.36**	**$ -**	**$ 16,682,638.60**	

SUMMARY OF CASH:

DEMAND DEPOSITS:	GENERAL ACCOUNT	$	7,121,575.39
SAVINGS ACCOUNT:	MONEY MARKET	$	25,690.65
INVESTMENTS:	LOCAL AGENCY INVESTMENT FD	$	9,535,372.56
	TOTAL CASH		**$ 16,682,638.60**

Years to Maturity for October 2021	1.28
Weighted Average Yield for October 2021	0.955%

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.			**$ 17,888,112.07**
Cash With Fiscal Agent	COPS/CFD 2005-01	3,141,643.98	
Cash With Investment Advisor	City Investments	13,352,007.70	
AV Center		1,186,448.13	
PR Account		204,822.26	
Petty Cash		3,190.00	
	GRAND TOTAL OF CITY FUNDS		**$ 34,570,750.67**

(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 park and AV Ranch improvement projects.
Storm Water includes the Dairy Fork and Wood Canyon Emergent Wetland Project.

(3) % of portfolio is based of investments & includes LAIF

Sheryl Mariano, Accounting Supervisor

City of Aliso Viejo

Portfolio Summay
As of 10/31/2021

Investment Type	Original Cost	Par Value	Market Value *	% of Portfolio
Federal Agency Coupon Securities	$ 3,743,366	$ 3,735,000	$ 3,758,985	16.36%
LAIF	$ 9,535,373	$ 9,535,373	$ 9,535,373	41.66%
Medium Term Notes	$ 2,000,620	$ 2,000,000	$ 2,052,677	8.74%
FDIC CDs	$ 6,609,897	$ 6,615,000	$ 6,761,810	28.88%
Treasury Coupon Securities	$ 998,125	$ 1,000,000	$ 1,017,090	4.36%
Portfolio:	**$ 22,887,380**	**$ 22,885,373**	**$ 23,125,934**	**100.00%**

Years To Maturity	1.28
Weighted Average Yield	0.955%

*Market Values obtained from US Bank Treasury Division

City of Aliso Viejo
Portfolio Management
Portfolio Details - Investments
October 31, 2021

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	Moody's	YTM 365	Days to Maturity	Maturity Date
LAIF												
98-30-007	10000	LAIF			9,535,372.56	9,535,372.56	9,535,372.56	0.203		0.203	1	
		Subtotal and Average	**9,532,971.81**		**9,535,372.56**	**9,535,372.56**	**9,535,372.56**			**0.203**	**1**	
Medium Term Notes												
037833DM9	10068	Apple		12/06/2019	500,000.00	512,453.50	497,165.00	1.800	Aa1	1.925	1,045	09/11/2024
594918BQ6	10069	Microsoft		12/06/2019	500,000.00	512,134.00	503,635.00	2.000	Aaa	1.794	645	08/08/2023
64952WDL4	10078	New York Life		01/22/2020	500,000.00	512,802.50	498,205.00	2.000	Aaa	2.076	1,178	01/22/2025
30231GBC5	10076	Exxon		12/12/2019	500,000.00	515,286.50	501,615.00	2.019	Aa2	1.946	1,019	08/16/2024
		Subtotal and Average	**2,000,620.00**		**2,000,000.00**	**2,052,676.50**	**2,000,620.00**			**1.935**	**971**	
Federal Agency Coupon Securities												
3133ELCP7	10070	Federal Farm Credit Bank		12/09/2019	235,000.00	240,844.22	233,926.05	1.625	Aaa	1.721	1,128	12/03/2024
3133ELDU5	10079	Federal Farm Credit Bank		02/18/2020	500,000.00	500,933.00	500,745.00	1.580	Aaa	1.496	42	12/13/2021
3133ELNE0	10080	Federal Farm Credit Bank		02/14/2020	500,000.00	508,971.50	499,245.00	1.430	Aaa	1.469	835	02/14/2024
3133ELZF4	10096	Federal Farm Credit Bank		05/14/2020	500,000.00	500,392.00	499,745.00	0.270	Aaa	0.290	378	11/14/2022
3133ELG99	10099	Federal Farm Credit Bank		06/10/2020	500,000.00	495,464.00	498,220.00	0.375	Aaa	0.465	952	06/10/2024
3130A3VC5	10081	Federal Home Loan Bank		02/20/2020	500,000.00	518,015.00	514,900.00	2.250	Aaa	1.441	767	12/08/2023
3130AJ7E3	10085	Federal Home Loan Bank		02/21/2020	500,000.00	507,093.50	499,080.00	1.375	Aaa	1.438	473	02/17/2023
3137EAEX3	10103	Federal Home Loan Mtg Corp		10/20/2020	500,000.00	487,271.50	497,505.00	0.375	Aaa	0.478	1,422	09/23/2025
		Subtotal and Average	**3,839,999.92**		**3,735,000.00**	**3,758,984.72**	**3,743,366.05**			**1.058**	**722**	
Treasury Coupon Securities												
912828T91	10067	U.S. Treasury		12/09/2019	500,000.00	511,035.00	500,175.78	1.625	Aaa	1.615	729	10/31/2023
912828YF1	10077	U.S. Treasury		12/12/2019	500,000.00	506,054.50	497,949.22	1.500	Aaa	1.652	318	09/15/2022
		Subtotal and Average	**998,125.00**		**1,000,000.00**	**1,017,089.50**	**998,125.00**			**1.634**	**524**	
FDIC CDs												
02007GJX2	10063	Ally Bank		05/23/2019	245,000.00	245,000.00	245,000.00	2.450		2.450	203	05/23/2022
05580ASU9	10066	BMW Bank		10/11/2019	245,000.00	249,285.37	245,000.00	1.850		1.850	344	10/11/2022
05465DAK4	10088	Axos Bank		03/26/2020	245,000.00	254,969.79	245,000.00	1.650		1.651	876	03/26/2024
14042TAN7	10062	Capital One USA Bank		05/22/2019	245,000.00	245,000.00	245,000.00	2.450		2.450	203	05/23/2022
14042RPG0	10089	Capital One USA Bank		04/09/2020	245,000.00	256,602.22	244,412.00	1.600		1.651	1,254	04/08/2025
15118RUV7	10091	Celtic Bank		04/17/2020	245,000.00	253,366.26	245,000.00	1.400		1.401	898	04/17/2024
15201QDF1	10095	Centerstate Bank		04/30/2020	245,000.00	252,027.58	244,522.25	1.200		1.251	911	04/30/2024

City of Aliso Viejo
Portfolio Management
Portfolio Details - Investments
October 31, 2021

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	Moody's	YTM 365	Days to Maturity	Maturity Date
FDIC CDs												
254673XL5	10059	Discover Bank		11/29/2018	245,000.00	245,000.00	245,000.00	3.250		3.250	28	11/29/2021
27002YEX0	10087	Eagle Bank		03/20/2020	245,000.00	254,242.14	244,510.00	1.550		1.603	870	03/20/2024
29278TKG4	10065	Enerbank USA		08/07/2019	245,000.00	248,861.21	245,000.00	2.050		2.050	280	08/08/2022
33847E3J4	10097	Flagstar Bank		05/15/2020	245,000.00	250,023.97	245,000.00	0.900		0.900	1,291	05/15/2025
32110YPS8	10094	First National Bank of America		04/23/2020	245,000.00	252,336.77	244,522.25	1.250		1.301	903	04/22/2024
38149MYB3	10105	Goldman Sachs Bank		08/11/2021	245,000.00	245,000.00	245,000.00	1.000		1.001	1,744	08/11/2026
538036JN5	10084	Live Oak Banking		02/28/2020	245,000.00	255,956.40	244,529.60	1.650		1.697	1,031	08/28/2024
58404DGU9	10092	Medallion Bank		04/30/2020	245,000.00	252,027.58	244,522.25	1.200		1.251	911	04/30/2024
59013KLQ7	10104	Merrick Bank		12/30/2020	245,000.00	243,990.11	245,000.00	0.550		0.550	1,520	12/30/2025
61690UUJ7	10086	Morgan Stanley Bank, NA		02/28/2020	245,000.00	258,239.07	244,416.90	1.800		1.852	1,214	02/27/2025
61760A4F3	10073	Morgan Stanley Pvt Bank		12/13/2019	245,000.00	259,084.32	244,416.90	1.950		2.002	1,137	12/12/2024
856285RU7	10072	Bank of India		12/06/2019	245,000.00	259,435.40	245,000.00	2.000		2.002	1,122	11/27/2024
7954505W1	10074	Sallie Mae Bank		12/13/2019	245,000.00	251,612.06	244,642.30	1.850		1.638	406	12/12/2022
87164DRQ5	10090	Synovus Bank		04/17/2020	245,000.00	245,000.00	245,000.00	1.200		0.964	168	04/18/2022
866264DP6	10098	Summit State Bank		05/18/2020	245,000.00	249,543.28	244,402.20	0.850		0.901	1,291	05/15/2025
87164WYW2	10064	Synchrony Bank		05/24/2019	245,000.00	245,000.00	245,000.00	2.450		2.450	204	05/24/2022
89214PCQ0	10093	Townebank		04/29/2020	245,000.00	245,000.00	245,000.00	1.150		1.150	179	04/29/2022
89235MJS1	10100	Toyota Financial		06/30/2020	245,000.00	248,769.08	245,000.00	0.800		0.729	1,337	06/30/2025
90348JR93	10106	UBS Bank		08/11/2021	245,000.00	245,000.00	245,000.00	0.950		0.951	1,744	08/11/2026
949495AA3	10071	Wells Fargo Bank West		12/13/2019	245,000.00	251,437.87	245,000.00	1.800		1.802	407	12/13/2022
		Subtotal and Average	**6,744,251.49**		**6,615,000.00**	**6,761,810.48**	**6,609,896.65**			**1.583**	**832**	
		Total and Average	**23,115,968.22**		**22,885,372.56**	**23,125,933.76**	**22,887,380.26**			**0.955**	**467**	

City of Aliso Viejo
Transaction Activity Report
October 1, 2021 - October 31, 2021
Sorted by Fund - Transaction Date
All Funds

Investment #	Fund	CUSIP	Inv Descrip	TransactionType	TransactionDate	Issuer	New Principal	Principal Paydowns	Interest	Total Cash
10084	999	538036JN5	LIVOAK 1.65% MAT	Interest	10/01/2021	Live Oak Banking			332.26	**332.26**
10083	999	3135G0Q89	FEDERAL NATL MTG	Redemption	10/07/2021	Federal National Mtg		500,000.00		**500,000.00**
10083	999	3135G0Q89	FEDERAL NATL MTG	Interest	10/07/2021	Federal National Mtg			3,437.50	**3,437.50**
10089	999	14042RPG0	CAPONE 1.6% MAT	Interest	10/08/2021	Capital One USA			1,965.37	**1,965.37**
10066	999	05580ASU9	BMW 1.85% MAT	Interest	10/12/2021	BMW Bank			2,272.46	**2,272.46**
10106	999	90348JR93	UBS 0.95% MAT	Interest	10/12/2021	UBS Bank			191.30	**191.30**
10071	999	949495AA3	WFC 1.8% MAT	Interest	10/13/2021	Wells Fargo Bank			362.47	**362.47**
10061	999	87270LBZ5	TIAA 2.5% MAT	Redemption	10/18/2021	TIAA FSB		245,000.00		**245,000.00**
10061	999	87270LBZ5	TIAA 2.5% MAT	Interest	10/18/2021	TIAA FSB			3,087.67	**3,087.67**
10061	999	87270LBZ5	TIAA 2.5% MAT	Interest	10/18/2021	TIAA FSB			16.83	**16.83**
10091	999	15118RUV7	CELTIC 1.4% MAT	Interest	10/18/2021	Celtic Bank			281.92	**281.92**
10087	999	27002YEX0	EGBN 1.55% MAT	Interest	10/20/2021	Eagle Bank			312.12	**312.12**
10094	999	32110YPS8	FNAMER 1.25% MAT	Interest	10/22/2021	First National Bank			251.71	**251.71**
10088	999	05465DAK4	BOFI 1.65% MAT	Interest	10/26/2021	Axos Bank			332.26	**332.26**
10090	999	87164DRQ5	SNV 1.2% MAT	Interest	10/26/2021	Synovus Bank			1,474.03	**1,474.03**
10093	999	89214PCQ0	TOWN 1.15% MAT	Interest	10/29/2021	Townebank			1,412.61	**1,412.61**
10095	999	15201QDF1	CTRSTE 1.2% MAT	Interest	10/30/2021	Centerstate Bank			1,474.03	**1,474.03**
10104	999	59013KLQ7	MERRIC 0.55% MAT	Interest	10/30/2021	Merrick Bank			110.75	**110.75**
10067	999	912828T91	USTR 1.625% MAT	Interest	10/31/2021	U.S. Treasury			4,062.50	**4,062.50**
10092	999	58404DGU9	MEDBNK 1.2% MAT	Interest	10/31/2021	Medallion Bank			1,482.08	**1,482.08**
		Totals for Pooled Cash						**745,000.00**	**22,859.87**	**767,859.87**
10000	LAIF	98-30-007	LAIF 0.%	Interest	10/15/2021	LAIF			4,961.54	**4,961.54**
10000	LAIF	98-30-007	LAIF 0.%	Purchase	10/16/2021	LAIF	4,961.54			**-4,961.54**
		Totals for Local Agency Investments Fund					**4,961.54**		**4,961.54**	**0.00**
		Grand Total					**4,961.54**	**745,000.00**	**27,821.41**	**767,859.87**

California State Treasurer
Fiona Ma, CPA



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

CITY OF ALISO VIEJO

FINANCE DIRECTOR
12 JOURNEY, #100
ALISO VIEJO, CA 92656

Account Number: 98-30-007

October 2021 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
10/15/2021	10/14/2021	QRD	1688465	N/A	SYSTEM	4,961.54

Account Summary

Total Deposit:	4,961.54	Beginning Balance:	9,530,411.02
Total Withdrawal:	0.00	Ending Balance:	9,535,372.56

PMIA/LAIF Performance Report as of 11/17/21

PMIA Average Monthly Effective Yields[1]

Oct	**0.203**
Sep	0.206
Aug	0.221

Quarterly Performance Quarter Ended 09/30/21

LAIF Apportionment Rate[2]:	0.24
LAIF Earnings Ratio[2]:	0.00000661958813242
LAIF Fair Value Factor[1]:	0.999873661
PMIA Daily[1]:	0.20%
PMIA Quarter to Date[1]:	0.22%
PMIA Average Life[1]:	321

Pooled Money Investment Account Monthly Portfolio Composition [1] 10/31/21 $174.8 billion

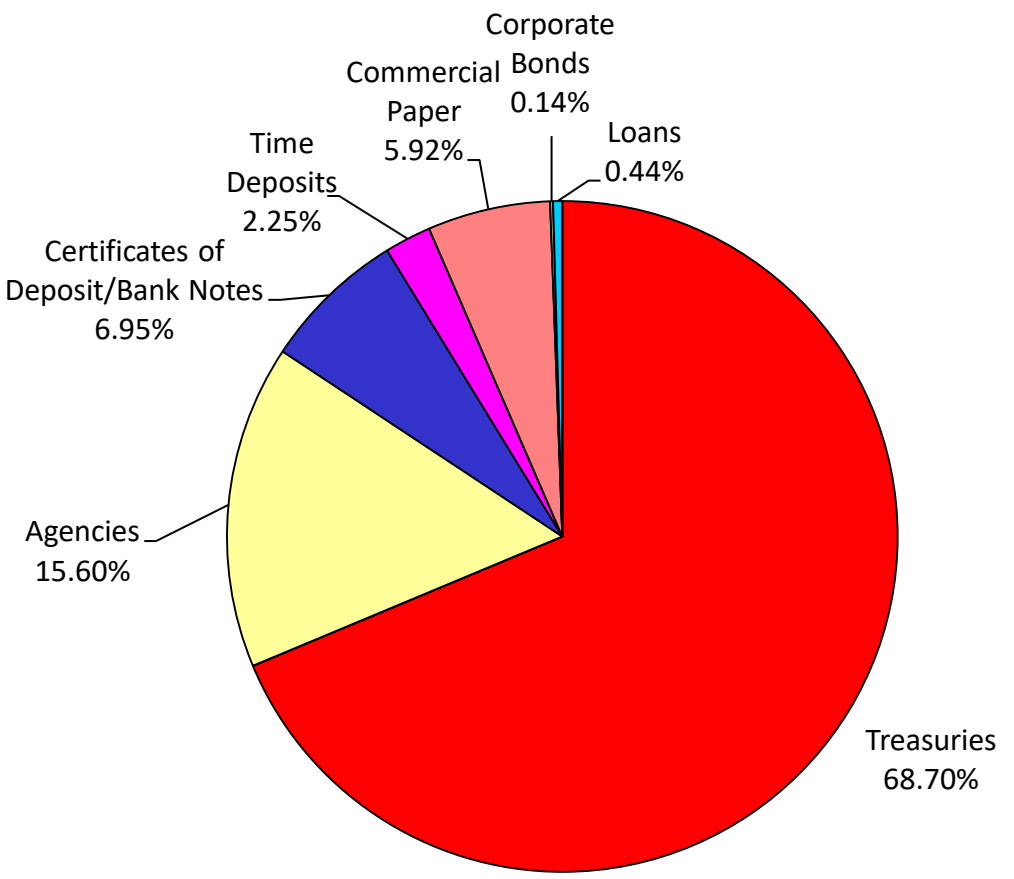


Chart does not include $7,685,000.00 in mortgages, which equates to 0.004396%. Percentages may not total 100% due to rounding.

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).

Source:
[1] State of California, Office of the Treasurer
[2] State of Calfiornia, Office of the Controller

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Paul Espinoza, Interim Administrative Services Director

SUBJECT: ANNUAL COMPREHENSIVE FINANCIAL REPORT (ACFR)

Recommended Action:

Receive and file the Annual Comprehensive Financial Report (ACFR) for the year ended June 30, 2021.

Fiscal Impact:

None.

Background:

The Annual Comprehensive Financial Report was prepared in conformity with Generally Accepted Accounting Principles (GAAP) and audited by certified public accountants Rogers, Anderson, Malody & Scott, LLP, in accordance with Generally Accepted Auditing Standards (GAAS) issued by the Comptroller General of the United States. This report complies with Reporting Postemployment Benefits other than Pensions as required by Statement 75, developed by the Governmental Accounting Standards Board (GASB). The Government-Wide financials include two reports, a statement of net assets and a statement of activities, as required by GASB Statement 34 to provide information for assessing operational accountability for the entity. These reports are required to report on all operations of the entity including capital assets, infrastructure, and depreciation. The City is also in the process of implementing GASB Statement 87. The objective of this Statement is to better meet the information needs of financial statement users by improving accounting and financial reporting for leases by governments. Under this Statement, a lessee is required to recognize a lease liability and a lessor is required to recognize a lease receivable thereby enhancing the relevance and consistency of reporting information about a governments' leasing activities. The City received an unmodified report or 'clean' opinion for the results of operations for the year ending June 30, 2021.

Discussion:

The ACFR is divided into three major sections: Introductory, Financial, and Statistical. The Introductory Section presents the Transmittal Letter of the report, which discusses the Government Profile, Economic Condition, and Outlook for the City, Major Initiatives, and Future Projects/Financial Planning. The Financial Section, specifically the *Management's Discussion and Analysis,* details how to read and understand the financial statements of the report, presents an overview of the City's financial activities and uses graphs and charts to quickly summarize the information. The information is presented in both government-wide statements and by major funds. The Statistical Section provides information and historical trends to give additional context to the financial reports and assist the reader in understanding the City's financial position and future. The City's net position reports on all assets (cash, receivables, and capital assets), liabilities (payables, other post-employment benefit obligations, and pension obligations) and deferred outflows and inflows of resources (changes in pension-related obligations).

Government-wide Financials

Some of the financial highlights at the government-wide level are:

- The total revenue from all sources equaled $24,462,798.
- The total cost of all city expenditures equaled $26,964,241.
- The net cost of providing Governmental Activities was $18,110,259.
- The City spent $3,425,242 for its street maintenance, traffic mitigation, improvement and rehabilitation projects.
- The City spent $350,508 on Capital Improvement projects such as Dairy Fork and Wood Canyon wetland rehabilitation projects, and facility improvements at the Aquatic Center, Aliso Viejo Center, Iglesia Park, and City Hall. Funds in the amount of $10,240,431 was spent on construction of the Aliso Viejo Ranch project.
- Overall net position, which includes all assets decreased by $2,501,443 as a result of operations, for a total net position of $131,833,818. Total net position includes $101,009,829 of capital assets, $25,601,465 of unrestricted fund balance, and $5,222,524 of restricted special revenue fund balance.

Overall, the City fared well despite the downturn in the economy and the financial markets. Recovery from the massive reduction in economic activity seen over the last quarter of the FY 2020-21 is continuing. While a moderate increase in GDP is expected in Q3, the pace of the recovery has slowed. Most indicators of activity are slightly below above their June quarter average including retail sales and home sales. Other categories such as leisure and entertainment experienced massive declines are now realizing recovery over the past few months.

Incoming revenues and expenditures were maintained at levels required to implement Council directives and retain current levels for programs and services. Compared to fiscal year 2019-2020 total revenues were down 2.8%, primarily due to decreases in sales tax, use of money and property and transient occupancy tax (TOT), charges for services.

Sales tax revenue decreased primarily due to the impacts of the pandemic. TOT decreased due to impacts of the pandemic which brought occupancy rates and business travel to a halt. Use of money and property decreased due to declining market conditions resulting from the economic shut down from the pandemic and the cancellation of events and programs at the City facilities.

Total expenses increased by 5.41%. General Government saw the largest increase followed by Public Works and then Community Services. Increases in General Government were a result of the increase in the City Attorney Department, Economic Development Department and Information Technology. Public Works increases in were the result of increases in salary and benefits, contractual services and master plans. Community Services were the result of increased operating costs of the AV Ranch, Iglesia building and park.

Total assets increased by .18% primarily due to construction of the AV Ranch project and a decrease in deferred outflows largely due to an additional pension contribution by the City. Total Liabilities increased 15.1% due to the issuance of COP 2019 for the AV Ranch project and changes in deferred inflows of resources for pension and OPEB obligations.

On August 13, 2019, the City issued $12,250,000 of tax-exempt Certificates of Participation to provide financing for the construction of the Aliso Viejo Ranch. The principal is due annually in amounts ranging from $235,000 to $640,000 on November 1 of each year commencing in 2020 through the year 2049 with a coupon rate ranging from 2% to 4%.

The City expended $2,310,394 in special revenue funds, including TCRF, Gas Tax, SB1, Measure M, and State grants on the City's annual slurry seal and street rehabilitation projects. In addition, $3,425,242 was spent to maintain and enhance the City's streets, including traffic mitigation, street lighting and sweeping services.

Capital Improvement projects totaled $350,508 for projects including City Facility improvements, Dairy Fork and Wood Canyon wetland Rehabilitation and Restoration, as well as a continuation of stormwater cleanup measures. Funds in the amount of $9,659,998 was spent on construction of the Aliso Viejo Ranch project.

Overall, City operations were consistent with prior year operating levels. The current fund balance reserves reflect both compliance with the Management and Budget policy adopted by City Council and Council's exceptional fiscal management enabling the City to provide excellent services to its residents.

General Fund

Some of the financial highlights at the fund level are:

Revenues: Actual revenues received were marginally above final year-end budget by $682,407 or 3.8%. Sales Taxes received exceeded year end budget expectations by $396,907 or 12.7% but significantly below original budget estimates. This increase is primarily attributable to the slow recovery from the pandemic shut down. Property tax received were in line with expectations with a slight increase of .7% over budget.

Transient occupancy taxes (TOT) received was 14.9% less than budget due to impacts of the pandemic which brought occupancy rates and business travel to a halt. In addition, one of the hotels within the City closed for construction within the same timeframe. Franchise fees received were 3.3% under budget due to lower receipts from cable and waste collections. Adjusted for the loss in sales tax and TOT, General Fund revenues in FY 2021-2022 are expected to be consistent with the trend lines for the prior year.

Expenditures: Actual expenditures incurred were $1,829,826 or 7.0% lower than the final year-end budget as a result of the proactive approach by City Council and staff, the City was able to reduce costs in programs and departments. Cost recoveries on charges for services are offset by proportional costs for providing these services. City facilities experienced loss in revenues due to the cancellation of events and programs, thus, expenses were reduced as much as possible by curtailing operations. Overall, General Fund expenditures in FY 2021-22 are expected increase over FY 2020-21 actual expenditures due increased economic development outreach, additional software and hardware enhancements to secure the City's vital infrastructure and intellectual data, staffing and program costs associated with providing enhanced recreation programs to the community by recreation services, an increase in the Law Enforcement contract costs, continued work efforts on the Aliso Viejo Ranch site, and an increase in personnel costs across all departments within the City.

Ending Fund Balance: Ending Fund Balance for the year decreased by 17.7% from FY 2019-2020, for a total ending balance of $27,131,163. Included in the fund balance are non-spendable funds of $76,150 and assigned funds of $27,117,572 and unassigned funds in the amount of $(62,559). The estimated fund balance at the fiscal year end of June 30, 2021, is equal to 123% of the fiscal year 2021-2022 Adopted Budget General Fund appropriations.

The City has successfully completed and reported on its fiscal year 2020-21 operations. Exceptional direction and support from the City Council has enabled the City to stay abreast of its financial projections, retain its AA+ rating, maintain a sound financial base with adequate reserves, and prepare for the future ahead.

Attachment:

1. Annual Comprehensive Financial Report

CITY OF ALISO VIEJO, CALIFORNIA

ALISO VIEJO

ANNUAL COMPREHENSIVE FINANCIAL REPORT



FY 2020-21

CITY OF ALISO VIEJO
Aliso Viejo, California

ANNUAL COMPREHENSIVE FINANCIAL REPORT

FOR THE FISCAL YEAR ENDED JUNE 30, 2021

Prepared by

FINANCIAL SERVICES

CITY OF ALISO VIEJO
ANNUAL COMPREHENSIVE FINANCIAL REPORT
FOR FISCAL YEAR ENDED JUNE 30, 2021
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CITY OF ALISO VIEJO
ANNUAL COMPREHENSIVE FINANCIAL REPORT
FOR FISCAL YEAR ENDED JUNE 30, 2021
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CITY OF ALISO VIEJO
ANNUAL COMPREHENSIVE FINANCIAL REPORT
FOR FISCAL YEAR ENDED JUNE 30, 2021
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ALISO VIEJO
Live Life Inspired

MAYOR
Ross Chun

MAYOR PRO TEM
Richard Hurt

COUNCIL MEMBER
Tiffany Ackley

COUNCIL MEMBER
Dave Harrington

COUNCIL MEMBER
Mike Munzing

CITY MANAGER
David A. Doyle

CITY ATTORNEY
Scott C. Smith

CITY CLERK
Mitzi Ortiz, MMC

January 6, 2022

To the Residents of the City of Aliso Viejo:

It is with great pleasure that we present the City of Aliso Viejo's Annual Comprehensive Financial Report (ACFR) for fiscal year 2020-2021. This report has been prepared by the Department of Financial Services in conformity with Generally Accepted Accounting Principles (GAAP) and has been audited in accordance with Generally Accepted Auditing Standards (GAAS) by a firm of licensed Certified Public Accountants.

The report consists of management representations concerning the finances of the City. Consequently, responsibility for both the accuracy of the data and the completeness and fairness of the presentation, including all disclosures, rests with the City. To provide a reasonable basis for making these representations, management has established a comprehensive internal control framework that is designed to protect the government's assets from loss, theft, or misuse and to compile sufficient reliable information for the preparation of the financial statements. Since the cost of internal controls should not outweigh their benefits, the City's comprehensive framework of internal controls has been designed to provide reasonable, rather than absolute, assurance that the financial statements are free from material misstatement. To the best of our knowledge and belief, the enclosed information is accurate in all material respects and is reported in a manner designed to fairly present the financial position of the City. All disclosures necessary to enable an understanding of the City's financial activities have been included.

Rogers, Anderson, Malody & Scott, LLP, a firm of licensed Certified Public Accountants, has audited the City of Aliso Viejo's financial statements. The goal of the independent audit is to provide reasonable assurance that the City's financial statements for the fiscal year ended June 30, 2021, are free of material misstatement. The independent audit involved examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements, assessing the accounting principles used and significant estimates made by management, and evaluating the overall financial statement presentation. The independent auditor concluded, based upon the audit, that there was a reasonable basis for rendering an unmodified opinion that the City of Aliso Viejo's financial statements for the fiscal year ended June 30, 2021, are fairly presented in conformity with GAAP. The independent auditor's report is presented as the first component of the financial section of this report.

This ACFR includes the financial activity for all funds of the City. In addition to the fund-by-fund financial information presented in the City's financial statements, government-wide financial statements are also included. The government-wide financial statements include a Statement of Net Position that provides the total net equity of the City, including infrastructure, and the

Statement of Activities that shows the cost of providing government services. These statements have been prepared using the accrual basis of accounting whereas the fund financial statements were prepared using the modified accrual method. A reconciliation report is provided as a key to understanding the changes between the two reporting methods. In addition, the Statement 34 standard includes an emphasis on the City's major funds as shown in the Governmental Fund Statements. These statements, combined with other information, are further analyzed in a narrative section called Management's Discussion and Analysis (MD&A). The MD&A provides "financial highlights" and interprets the financial reports by analyzing trends and explaining changes, fluctuations, and variances in the financial data. In addition, the MD&A is intended to disclose any known significant events or decisions that affect the financial condition of the City. This letter of transmittal is designed to complement the MD&A and should be read in conjunction with it.

PROFILE OF THE CITY

The City of Aliso Viejo was incorporated on July 1, 2001, as a general law city under the laws of the State of California. The City of Aliso Viejo encompasses approximately seven square miles in south Orange County and has a population of 49,813 per data provided by the California Department of Finance (DOF). Approximately 46 miles south of Los Angeles and 70 miles north of San Diego, the City is adjacent to the cities of Laguna Beach, Laguna Woods, Laguna Hills and Laguna Niguel.

The City operates under the Council-Manager form of government. The City Council is comprised of five members elected at large for staggered four-year terms of office. The Mayor and Mayor Pro-Tem are selected by the Council from among its members to serve one-year terms. The Council acts as the legislative and policy-making body of the City, enacting all laws and directing such actions as required, to provide for the general welfare of the community.

The City Manager is appointed by the City Council and is responsible for overseeing the operations of the City and implementing the policy decisions made by the City Council. The City Attorney and City Treasurer are also appointed by the City Council. All other department heads and employees are appointed by the City Manager.

The City provides municipal services through a combination of in-house staffing and contract services. Police and fire services, street maintenance, building, engineering, and legal services are all provided through contracts. The Aliso Viejo Community Association, a master community association, owns and manages 21 parks within the City limits. This Association also maintains most of the landscaped slopes and parkways. The City owns and manages Iglesia Park, Vista Park, and the Aliso Viejo Ranch. The Orange County Library System provides public library services.

Prior to the beginning of each fiscal year, the City Council adopts the annual budget, which serves as the foundation for the City's financial planning and control. The budget is arranged by fund, function and department and presented to the Council by the City Manager. The level of budgetary control is established at the fund level. Transfers of appropriations between fund budgets can be made with the approval of the City Manager and Director of Financial Services. The City Council's approval is required for all budget amendments that result in a change to the adopted budget. The budget is reviewed midyear in January by the City Manager and the Director of Financial Services to ensure compliance with City Council direction. The Mid-Year Budget is then reviewed by the City Council and consideration is given to necessary adjustments for new programs,

projects and other adjustments to ensure that expenditures and revenues are in line with the budgeted projections.

The City maintains an encumbrance accounting system as an additional method of budgetary control. As demonstrated by the statements and schedules included in the financial section of this report, the City continues to meet its responsibility for sound financial management.

ECONOMIC CONDITION AND OUTLOOK

Information presented in the City's financial statements is best understood within the context of our broader economic conditions. The City's local economy is showing life once again as the Southern California region continues to emerge from COVID-19. The industries that were hit the hardest during the pandemic were fuel and service stations and restaurants and hotels. Since consumers were required to stay home a significant portion of the time in the FY 2020-21, travel was stagnant and dining out was not popular. Hotels and restaurants, general consumer stores and schools were shut down during most of the FY 2020-21 and the shelter-in-place required more people to work from their homes and kids received their education online, which reduced the need to use vehicles and purchase fuel. Despite this, the last quarter of the FY 2020-21 showed increased demand for fuel as stay at home orders and other COVID restrictions eased resulting in a higher demand for fuel and increasing associated sales tax.

Children have resumed to in person learning, many people have returned to working at the office, and consumers are dining out again. This resulted in an increase of casual, quick service, leisure/entertainment, and fast casual dining activity.

Based on the most recent estimates from the Bureau of Economic Analysis, real GDP increased at an annual rate of 2.0% in the third quarter of 2021 after increasing 6.7% in the second quarter 2021. The updated UCLA Anderson Forecast for 2021 calls for annual GDP growth of 5.6% which is slightly down 1.5% for the earlier estimate of 7.1% rate predicted in June. For 2022, growth is expected to be 4.1%, down from the 5.0% rate forecast in June 2020. The Congressional Budget Office (CBO) is projecting that employment surpasses its pre-pandemic level in mid-2022. The unemployment rate declines through 2022 and then remains near or below 4.0% for several years. In September, the Federal Open Market Committee (FOMC) kept the target range for the federal funds rate at 0 to ¼ percent and expects it will be appropriate to maintain this target range until labor market conditions have reached levels consistent with the Committee's assessments of maximum employment and inflation has risen to 2 percent and is on track to moderately exceed 2 percent for some time.

LOCAL ECONOMY

Although California's unemployment rate was estimated at 7.5% in August 2021, Orange County's rate has been consistently lower and was estimated at 6.0%, according to the latest available data by the California Employment Development Department. Orange County's regional economy recovers from pandemic lows primarily due to professional & business services and scientific & technical services having now regained most jobs lost since the beginning of the pandemic. Aliso Viejo is comprised of single-family homes, condominiums, and apartments as well as a mixture of retail, office, light industrial, and service entities providing a solid tax base for the City. Most retail and commercial businesses are oriented toward serving residents and visitors. The City is also home to numerous regional and corporate headquarters in a variety of industries, particularly in the biomedical and healthcare industries. This dynamic local business environment and availability of amenities in the community will assist Aliso Viejo in weathering the current recession

and position its local economy for future recovery and growth. The City is nearly built out, with limited future opportunities for new residential or commercial construction. However, revitalization of existing sites and mixed-use in-fill opportunities in the Aliso Viejo Town Center provide new opportunities and funding sources for the City.

The City's major revenue sources are property taxes, sales taxes, franchise fees and transient occupancy taxes. The City also receives significant revenue streams through property taxes in-lieu of motor vehicle license fees, which are apportioned similarly to property taxes. Revenues budgeted for FY 2021-2022 were estimated conservatively, adjusted for one-time revenues, and project a modest recovery in the economy. Estimated taxes for FY 2021-21 are expected to increase when compared to actual receipts for FY 2020-21. Other revenue estimates are also expected to increase from FY 2020-21 receipts due to the completion of the AV Ranch project. Appropriations have been increased to accommodate deferred projects from the prior year while maintaining service levels at prior year levels except for Council recommended new projects and programs.

LONG TERM FINANCIAL PLANNING

As of June 30, 2021, the City has an assigned General Fund balance of $27 million, including $8.3 million for future replacement of City infrastructure assets, $2.6 million for contingencies, $15 million for emergencies and unanticipated CIP projects, and $1.1 million for future benefit obligations. The City has an negative unassigned General Fund balance of $-62,559. On August 13, 2019, the City issued $12,250,000 of tax-exempt Certificates of Participation to provide financing for the construction of the Aliso Viejo Ranch. The principal is due annually in amounts ranging from $230,000 to $635,000 on November 1 of each year commencing in 2020 through the year 2049. Interest is payable semi-annually in amounts ranging from $9,525 to $212,325 and is due on May 1 and November 1 of each year commencing on November 1, 2019. The interest payments have rates ranging from 0.96% to 3.09%. The City publishes a Five-Year Strategic Plan to identify key factors affecting the City's fiscal outlook, examine fiscal trends, and analyze the General Fund's ability to continue current services, maintain existing assets, and fund City Council initiatives over the next five years. The Five-Year Strategic Plan is updated and published periodically.

RELEVANT FINANCIAL POLICIES

The City has made a practice of living within its means since incorporation. In fiscal year 2005-06, the City Council formally adopted a Management and Budget policy to promote sound financial management which, in turn, led to improved bond ratings and lower cost of capital. The City continues to be conservative with expenditures while maintaining adequate reserves in accordance with City policies. General Fund surpluses, as well as outside funding sources when available, have been used to fund projects as directed by the City Council. To uphold the City's reputation of providing excellent amenities for residents and businesses, City staff continues to actively pursue outside grants and funding opportunities whenever possible. The City's Fund Balance Policy was approved in 2012 to establish procedures for reporting unrestricted fund balances in the City's financial statements. The policy authorizes the City Manager and Director of Financial Services to prepare financial reports which accurately categorize fund balance per GASB 54, *Fund Balance Reporting and Governmental Fund Type Definitions.* The City's long-term financial plans are also in accordance with these policies.

MAJOR INITIATIVES

The City's Economic Development program continued ongoing initiatives aimed at facilitating the retention and expansion of existing businesses, attracting new businesses to the community, and promoting the City's "business friendly" environment. In FY 2020-2021, the City created an Economic Recovery Task Force comprised of multiple City Departments to address the economic impacts of Covid to our businesses, residents and City government finances. Through the Task Force, the City created and implemented several programs including the Go Outdoor (GO) grant to assist businesses in moving their operations outdoors and a separate business grant to financially assist struggling businesses. The Task Force also created large outdoor dining areas: The Row and The Patio to allow for safe outdoor dining experiences. CDBG funds were also provided to non-profit organizations to assist residents who were unable to pay for food, rent, utilities, etc.

In July 2016, the City entered into an economic development subsidy agreement with EFUEL. EFUEL is an on-site mobile fueling business for diesel fueled vehicles and generators within the City. Under this agreement, EFUEL shall receive graduated percent (starting at fifty percent 50%) of sales tax revenue by the City attributable to EFUEL. For the year ended June 30, 2021, the City abated sales taxes totaling $253,432.

The City continues to remain proactive in reviewing and negotiating agreements to be competitive and up to date with current market conditions. The City, after extensive community outreach and prior efforts to develop the 7.7-acre, City owned Aliso Viejo Ranch Project site, developed a plan to preserve and adaptively reuse the historic structures on the site and add new community, agricultural, educational, and park uses to the property. By rehabilitating the historic structures on site, the project aims to pay homage to the historic character of the site and surrounding area while balancing the community's need for new and expanded community facilities. Construction began on the facility in May 2019 and was officially opened in May of 2021.

Over the last year, several large developments have also been underway. Glaukos Corporation constructed their new headquarters on a three-acre site and will be occupying the space in the coming months. A new behavioral health facility was also under construction during this time and is ready for occupancy once the required State permits and license are obtained. The remainder of the Freedom Lane area is also either entitled for new development or has applications in process. A new Kaiser medical office building was approved to be construction at 800 Freedom Lane. Three new warehouse building are also in the planning entitlement process for 400 through 800 Freedom Lane.

AWARDS AND ACKNOWLEDGMENTS

The Government Finance Officers Association (GFOA) offers a Certificate of Achievement for Excellence in Financial Reporting to cities for their Annual Comprehensive Financial Report (ACFR). This Certificate is a prestigious award, recognizing conformance with the highest standards of state and local government financial report preparation. In order to be awarded a Certificate of Achievement, a government unit must publish an easily readable and efficiently organized ACFR, whose contents conform to program standards. Such a ACFR must satisfy both generally accepted accounting principles and applicable legal requirements. The City submitted its FY 2019-2020 ACFR for review and received the award for excellence in financial reporting from GFOA. The Certificate is valid for a period of one year. The City will also be submitting its FY 2020-2021 ACFR to GFOA for review. We would like to recognize the assistance of the Financial Services staff in the preparation of the CAFR and to our independent auditor, Rogers,

Anderson, Malody & Scott, LLP. For their expertise and advice in preparing an improved financial report. Through the team effort of the City Council and staff, the City has been able to maintain a sound financial base from which to operate and continue to provide a high level of service to the community.

Respectfully submitted,



David Doyle
City Manager

Government Finance Officers Association

Certificate of Achievement for Excellence in Financial Reporting

Presented to

City of Aliso Viejo
California

For its Annual Comprehensive
Financial Report
For the Fiscal Year Ended

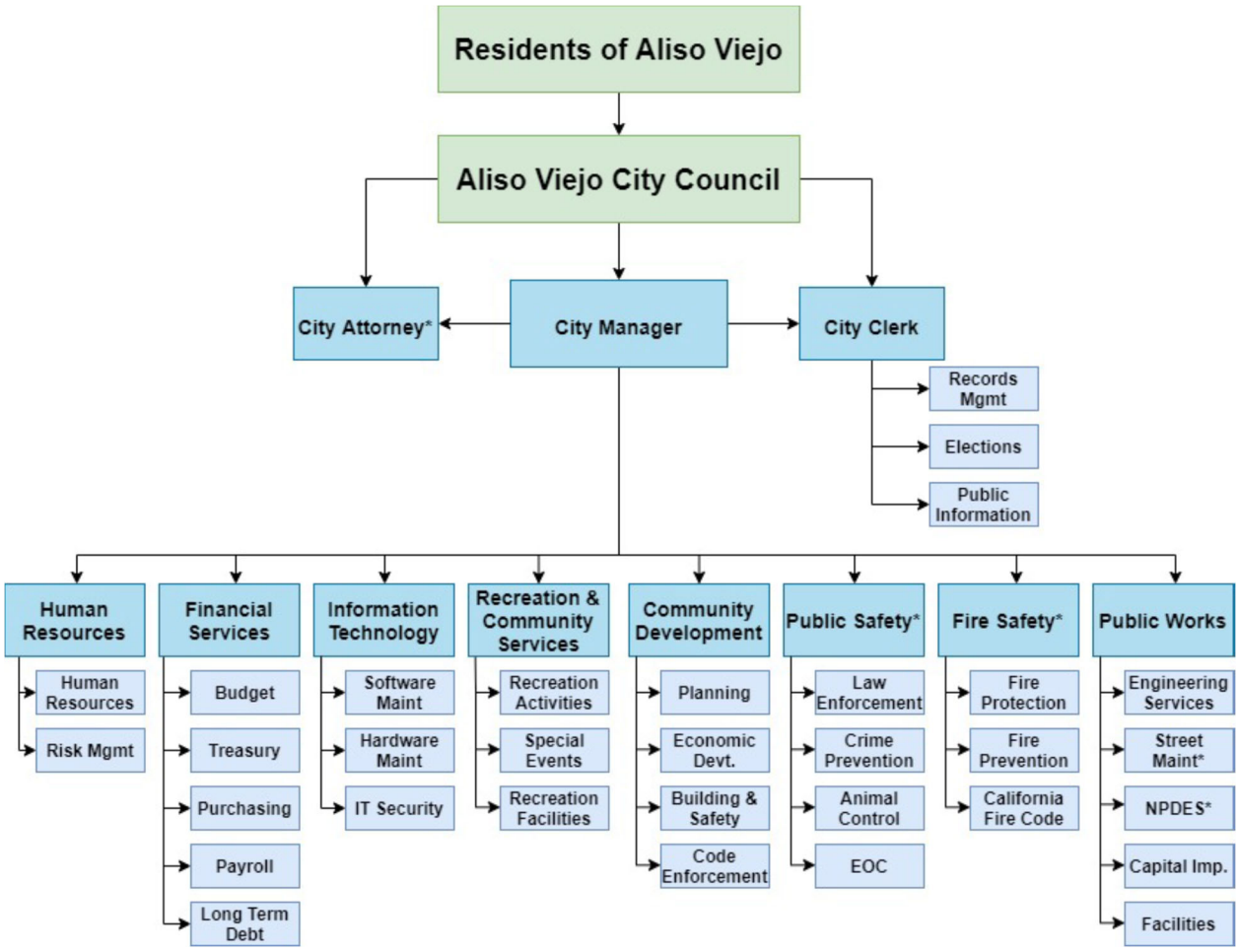
June 30, 2020

Christopher P. Morrill

Executive Director/CEO

City of Aliso Viejo
Organizational Chart

June 30, 2021



CITY OF ALISO VIEJO
LIST OF PRINCIPAL OFFICIALS

Council-Manager Form of Government

CITY COUNCIL

TIFFANCY ACKLEY
Mayor

ROSS CHUN
Mayor Pro Tem

RICHARD HURT Council Member	DAVID HARRINGTON Council Member	MIKE MUNZING Council Member

CITY ADMINISTRATION

DAVID DOYLE
City Manager

Scott Smith, City Attorney
Paul Espinoza, Inteirm Director of Financial Services/City Treasurer
Mitzi Ortiz, City Clerk
Omar Dadabhoy, Director of Planning Services
Shaun Pelletier, City Engineer/Public Works Director
Stephanie Brown, Community Services Manager
Isaac Aziz, Information Technology Manager
Lieutenant Chad Kajfasz, Chief of Police Services
Division Chief Mike Contreras, Fire Services (Orange County Fire Authority)

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ROGERS, ANDERSON, MALODY & SCOTT, LLP
CERTIFIED PUBLIC ACCOUNTANTS, SINCE 1948

Independent Auditor's Report

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909 889 5361 F
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To the Honorable Mayor and Members of the City Council
City of Aliso Viejo, California

Report on the Audit of the Financial Statements

Opinions

We have audited the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of the City of Aliso Viejo, California (the City), as of and for the year ended June 30, 2021, and the related notes to the financial statements, which collectively comprise the City's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements present fairly, in all material respects, the respective financial position of the governmental activities, each major fund, and the aggregate remaining fund information of the City, as of June 30, 2021, and the respective changes in financial position thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the City and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

The City's management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the City's ability to continue as a going concern for one year after the date that the financial statements are issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the City's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the City's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control–related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the required supplementary information, such as management's discussion and schedules listed in the table of contents be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required

supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the City's basic financial statements. The supplementary information listed in the table of contents are presented for purposes of additional analysis and are not a required part of the basic financial statements.

The supplementary information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the supplementary information is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Information Included in the Annual Report

Management is responsible for the other information included in the annual report. The other information comprises the introductory and statistical sections but does not include the financial statements and our auditor's report thereon. Our opinions on the financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon. In connection with our audit of the financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

Emphasis of Matter

As discussed in Note 1 to the financial statements, the City adopted the provisions of Governmental Accounting Standards Board Statement No. 84, *Fiduciary Activities.* Our opinion is not modified with respect to this matter.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated January 6, 2022 on our consideration of the City's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the City's internal control over financial reporting and compliance.

Rogers, Anderson, Malody & Scott, LLP.

San Bernardino, California
January 6, 2022

Our discussion and analysis of the City of Aliso Viejo's financial performance provides an overview of the City's financial activities for the year ended June 30, 2021. Please read it in conjunction with the transmittal letter at the front of this report and the accompanying basic financial statements which follow this section.

FINANCIAL HIGHLIGHTS

- The General Fund balance decreased by 17.7% from fiscal year 2019-2020, for a total balance of $27,131,163. This balance is comprised of non-spendable funds of $76,150, assigned funds of $27,117,572, and $(62,559) of unassigned funds. The estimated fund balance at the fiscal year end of June 30, 2021 is equal to 123% of the fiscal year 2021-2022 Adopted Budget General Fund appropriations.
- The General Fund's actual resources available for appropriation (revenue inflows) exceeded the final budget by $(682,408 and actual appropriations (outflows) were $1,829,826 under budget, including reserve funding.
- General Fund expenditures and transfers out of $24,250,459 exceeded revenues and transfers in of $18,410,863 by $5,839,596.
- The City decreased its overall net position by $(2,501,443) or (1.86)% for a total net position balance of $131,833,818.
- The overall fund balance decreased by $(12,110,397) for an all funds fund balance of $32,315,354.
- Total assets on the Statement of Net Position increased .18% to $153,431,390 from the prior fiscal year.
- Total liabilities on the Statement of Net Position increased 15.11% to $21,688,559 due increase in unearned revenue.
- The total revenue from all sources amounted to $24,462,798.
- Deferred outflows decreased 2.63% or $17,036 largely due to an additional pension contribution by the City.
- The total cost of all City programs amounted to 26,964,241 and were offset with $8,853,982 of program revenues for a net cost of $18,110,259.
- Deferred inflows decreased 14.9% or $94,541 primarily due to new hires stabilizing and its impacts on projected benefits.
- The City spent $3,425,242 for its street maintenance, traffic mitigation, improvements and rehabilitation projects.
- The City spent $350,508 on Capital Improvement projects such as Dairy Fork and Wood Canyon wetland rehabilitation projects, and facility improvements at the Aquatic Center, Aliso Viejo Center, Iglesia Park and City Hall. Funds in the amount of $10,240,431 was spent on construction of the Aliso Viejo Ranch project.
- Special Revenue Funds, including TCRF, Gas Tax, Measure M2, and SB1 contributed $2,310,394 towards the City's median and street rehabilitation projects.

USING THIS ANNUAL REPORT

This annual report consists of a series of financial statements. The Statement of Net Position and the Statement of Activities provide information about the activities of the City as a whole and allow a longer-term view of the City's finances. Fund Financial Statements tell how City services were financed in the short-term as well as what remains for future spending. Fund financial statements also report the City's operations in more detail than the government-wide statements by providing information about the City's most significant funds.

Reporting the City as a Whole: The Statement of Net Position and the Statement of Activities

The Statement of Net Position and the Statement of Activities report information about the City as a whole and in a way that helps clarify the City's overall financial position. These statements include all assets and liabilities using the accrual basis of accounting, which is similar to the accounting method used by most private sector companies. All current year revenues and expenses are taken into account, regardless of when cash is received or paid. These two statements report the City's net position and changes in them. Net position, which is the difference between assets and liabilities, is one way to measure the City's financial health, or financial position. Over time, increases or decreases in the City's net position is one indicator of whether its financial health is improving or deteriorating. Consideration should also be given to other non-financial factors, such as changes in the City's property tax base and the condition of the City's roads, to assess the overall health of the City.

All of the City's basic services are considered to be governmental activities. The Statement of Net Position and the Statement of Activities present information about these governmental activities, including general government, community development, community services, public safety, and public works. Property tax, sales tax, transient occupancy tax, and franchise fees finance 56.1% of these activities.

Reporting the City's Most Significant Funds: Fund Financial Statements

The Fund Financial Statements provide detailed information about the most significant funds - not the City as a whole. In addition to the General Fund, other funds included are Gas Tax, Aliso Viejo Center, Debt Service Fund, Street Improvements and Certificate of Participation 2019. Lesser funds are collectively reported as Other Governmental Funds. Some funds are required to be established by State law. However, the City Council establishes many other funds to help it control and manage money for particular purposes or to show that it is meeting legal responsibilities for using certain taxes, grants, and other money.

The City currently has just one type of fund - governmental - which uses the modified accrual accounting approach. Governmental funds focus on how money flows into and out of those funds and the balances left at year-end that are available for spending. Most of the City's basic services are reported in governmental funds. Under the modified accrual method of accounting, revenues are recognized in the accounting period in which they become measurable and available to finance expenditures of the current fiscal period while expenditures are recognized in the accounting period in which the liability is incurred.

The governmental fund statements provide a detailed short-term view of the City's general government operations and the basic services it provides. Governmental fund information helps the reader determine whether there are more or less financial resources that can be spent in the near future to finance the City's programs. The relationship and differences between governmental activities reported in the Statement of Net Position and the Statement of Activities and the governmental funds statements are detailed in the reconciliations immediately following each of the fund financial statements.

The City as Trustee: Reporting the City's Fiduciary Responsibilities

The City is the trustee, or fiduciary, for certain amounts held on behalf of developers, property owners, and others. The City's fiduciary activities are reported in the Statement of Fiduciary Assets and Liabilities. We exclude these activities from the City's other financial statements because the City cannot use these assets to finance its operations. The City is responsible for ensuring that the assets reported in these funds are used only for their intended purposes.

THE CITY AS A WHOLE

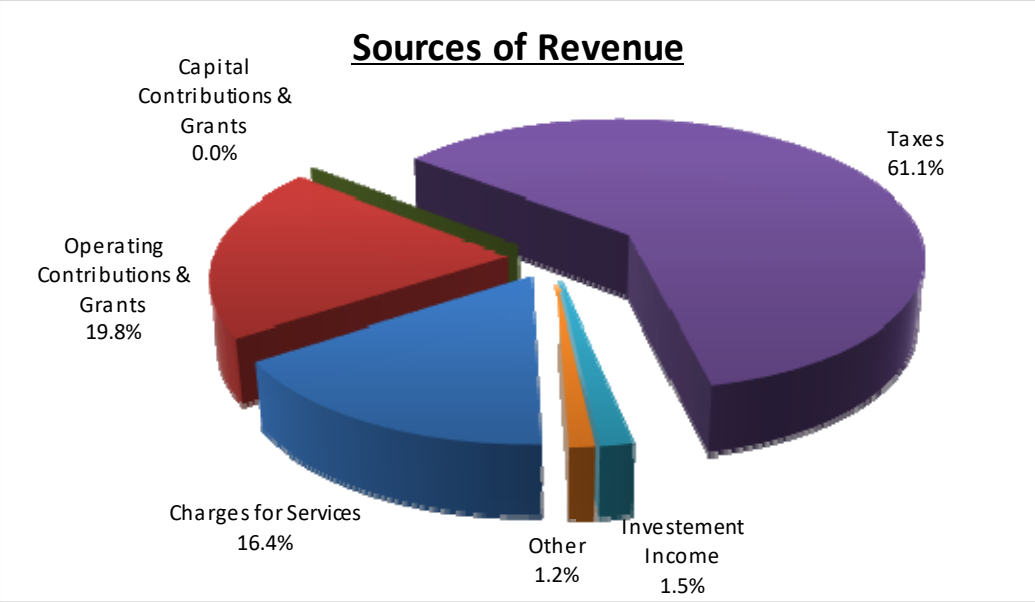
Our analysis focuses on the net position (Table 1) and change in net position (Table 2) of the City's governmental activities. The City has no business-type activities.

Table 1
Condensed Statement of Net Position

	Governmental Activities	
	2021	2020
Current and other assets	$ 39,453,424	$ 48,572,230
Capital assets, net	113,977,966	104,590,483
Total assets	**153,431,390**	**153,162,713**
Deferred Pension related items	597,294	622,323
Deferred OPEB related items	33,577	25,584
Total deferred outflows of resources	**630,871**	**647,907**
Non current liabilities	14,419,572	14,367,930
Other liabilities	7,268,987	4,473,004
Total liabilities	**21,688,559**	**18,840,934**
Deferred Pension related items	61,443	103,884
Deferred OPEB related items	478,441	530,541
Total deferred inflows of resources	**539,884**	**634,425**
Net Position:		
Invested in capital assets	101,009,829	93,873,835
Restricted	5,222,524	11,454,992
Unrestricted	25,601,465	29,006,434
Total net position	**$ 131,833,818**	**$ 134,335,261**

Total net position decreased $2,501,443 or 1.86% to $131,833,818 in FY 2020-21 as a result of current year operations, as discussed below:

- Total assets increased by .18% primarily due to the issuance of the Certificate of Participation 2019 (COP 2019) and funding from CARES, Community Development Block Grant (CDBG) and other grant monies received during the year.
- Liabilities increased by 15.1% due to increases in deposits payable at year end and due to changes in deferred inflows of resources..
- Net position includes funds invested in Capital Assets in the amount of $101,009,829.



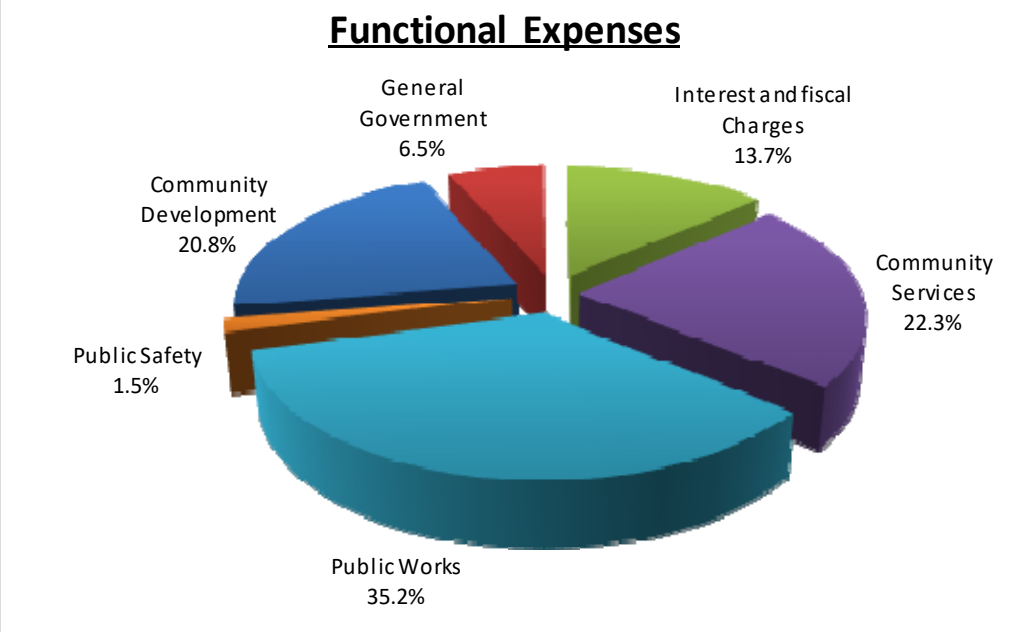


Table 2
Change in Net Position

	Governmental Activities	
	2021	2020
Revenues		
Program revenues:		
Charges for services	$ 4,001,459	$ 3,070,201
Operating contributions and grants	4,852,523	4,342,486
Capital contributions and grants	-	9,600
General revenues:		
Taxes:		
Sales taxes	3,524,908	4,765,921
Property taxes	8,981,521	8,647,685
Franchise taxes	1,672,280	1,729,418
Transient occupancy taxes	723,599	1,220,997
Motor vehicle license fees	36,704	40,659
Use of money and property	377,709	1,053,024
Other	292,095	292,184
Total revenues	24,462,798	25,172,175
Expenses		
General government	5,621,731	4,878,395
Community development	1,754,782	1,830,144
Community services	3,695,994	3,433,829
Public works	6,016,332	5,631,039
Public safety	9,480,235	9,312,287
Interest and fiscal charges	395,167	494,561
Total expenses	26,964,241	25,580,255
(Decrease) Increase in net position	**(2,501,443)**	**(408,080)**
Net position - beginning of year	134,335,261	134,743,341
Net position - end of year	$ 131,833,818	$ 134,335,261

Overall, the City fared well despite the downturn in the economy and the financial markets. Comparisons made in this report use actuals for FY 2019-20 and FY 2020-21. The City's total revenues from all sources were $24,462,798, while the total cost of all programs and services was $26,964,241. Compared to fiscal year 2019-2020 total revenues were down 2.82%, primarily due to decreases in sales tax, transient occupancy tax, and use of money and property. Sales taxes and transient occupancy taxes decreased primarily due to the shutdown caused by COVID and the use money and property and decreased due to cancellation of events and programs at the City facilities.

Total expenses increased by 5.41%. General Government saw the largest decrease followed by Public Works and Community Services. Decreases in all programs were a result of the salary savings from vacated positions during the fiscal year. Additionally, in fiscal year 2019-20 community development and general government included the CalPERS payout, adjustments for OPEB and pension costs. This large payout was not experienced in FY 2020-21.

Excluding interfund transfers, General Fund revenues decreased 2.82% for the year with the majority of the decrease attributed to a decrease in sales tax and transient occupancy tax. The City's main revenue sources are Property Tax, Sales Tax, Transient Occupancy Taxes and Franchise Fees. Property Taxes have been the most reliable local government revenue for decades and continues to be the City's largest revenue source at $8.9 million this year. Property Taxes were up 3.86% from the prior year and are expected to remain stable at the current level. This increase can be attributed to increases in home values resulting in higher assessed values and the effect of Proposition 8 assessed value adjustments.

Sales tax, the City's second largest revenue source, decreased 26.4% from FY 2019-2020 to $3.5 million. Multiple factors impacted the City's sales tax with a new normal estimated at $4.5 million. Over the past two years the City saw the closing of a major business and a misallocation by a local business, together the loss equates to $1.2 million and also impacts the calculation of monies received from countywide tax allocations. Taxpayer relief programs also accounted for some of the decline in receipts after factoring for payment deferrals and other accounting anomalies. Fuel receipts declined as many employees transitioned to working from home due to the shutdown. The City's business and industry sector and medical/biotech have assisted with offsetting some of these loses.

The decrease of 41% in Transient Occupancy Tax (TOT) is due to negligible occupancy rates and is attributed entirely to the shutdown. The City's hotels have averaged $970,000 in TOT revenue over the last two years and below 60% in occupancy rate. Charges for services saw an increase of 30% as the City continues to ramped up the hybrid process of providing online permitting and payment options to mitigate any impacts to the residents. Additionally, staff incorporated procedures to secure data and internal controls for safeguarding of City assets. Investment earnings decreased significantly by 64% due to declining market conditions resulting from the economic shut down from the pandemic.

Franchise fees decreased 3.3% to $1.6 million, due to lower receipts for electric, cable franchise and waste collection fees. These decreases were partially offset by an increase in Gas and waste disposal collections. Rapid developments in technology have provided the consumer with easy access to media and programming on mobile devices resulting in a modification in consumer behavior and subscription services.

The current performance of City revenues is reflective of the present state of the economy, impacts of the pandemic, recovery solutions implemented by the State and Federal governments as well as its excellent fiscal management and direction by Council. These significant revenues fund a large part of the City's basic services.

Government Activities

Tables 3 and 3A present the cost of each of the City's programs: General Government (Administrative Services), Community Development, Community Services, Public Safety, and Public Works, as well as each program's net cost (total cost less revenues generated by the activities).

Table 3
Net Cost of Governmental Activities
June 30, 2021

	Total Cost of Services	Program Revenues	Net (Revenue)/Cost of Service
General government	$ 5,621,731	$ -	$ 5,621,731
Community development	1,754,782	(1,985,136)	(230,354)
Community services	3,695,994	(2,469,572)	1,226,422
Public works	6,016,332	(3,929,195)	2,087,137
Public safety	9,480,235	(470,079)	9,010,156
Interest and fiscal charges	395,167	-	395,167
Total	$ 26,964,241	$ (8,853,982)	$ 18,110,259

Table 3A
Net Cost of Governmental Activities
June 30, 2020

	Total Cost of Services	Program Revenues	Net (Revenue)/Cost of Service
General government	$ 4,878,395	$ -	$ 4,878,395
Community development	1,830,144	(1,147,213)	682,931
Community services	3,433,829	(1,915,080)	1,518,749
Public works	5,631,039	(3,923,881)	1,707,158
Public safety	9,312,287	(436,113)	8,876,174
Interest and fiscal charges	494,561	-	494,561
Total	$ 25,580,255	$ (7,422,287)	$ 18,157,968

The City's total expenses were $26,964,241, which includes paying for the cost of law enforcement, animal control services, NPDES (storm water runoff), street repairs, recreation programs, administrative costs, and capital outlay.

General Government expenses are 21% of the total governmental expenses and include City Council, City Manager, City Attorney, City Clerk, Economic Development, Human Resources, Financial Services, Information Technology and Non-Departmental. The increase of $743,336 or 15.2% over the prior year was primarily due to expenses incurred in the City Attorney department, Economic Development and Information Technology. Recovery programs were implemented to assist businesses within the City to expand outdoors and assist with cash flow deficiencies. Hardware and software were purchased to enhance security and protect City intellectual data in response to telecommuting, remote access and providing City services online.

Community Development expenses are 6.5% of the governmental services expense and include Planning, Building and Safety, and Code Enforcement activities. Expenses incurred for these activities decreased by 4.1% this year and is entirely due to a $225,000 housing incentive provided to a developer for an affordable housing project in the previous year that was not provided for in the FY 2020-21. Various building and planning fee revenues as well as development fees assist in reducing the cost of providing these services. Marginal increases were incurred in the planning department for providing affordable housing review and support services offset by reductions in the contract cost for proving building check and permit services.

Community Services expenses are 13.7% of the governmental services expenses and increased 7.6% over last year due primarily to the Aliso Viejo Ranch coming online in the second half of the fiscal year. These costs include Community Services, Recreation Program, Iglesia Community Center and Park operating costs, as well as the Aliso Viejo Center and Aliso Viejo Aquatic Center. As we slowly come out of the pandemic, events are beginning to be scheduled at the Aliso Viejo and Aliso Viejo Ranch resulting in increased expenses and revenues for the facility. The City continues to explore marketing of the facilities and new programs at both facilities to generate additional revenues to assist with offsetting operational costs. Personnel costs increased in preparation of new programs that will be offered by the recreation department. One-time spending on capital projects completed at both the facilities included LED lighting upgrade, paint, furniture, and lawn design.

Public Works expenses are 22.3% of the governmental services. Public Works spending increased by 6.8%, mainly due to completion of capital projects carried over from the prior year. The Public Works department manages all street and traffic maintenance, capital improvement projects, and any other major construction projects. Operating contributions and grants provide a large portion of the funding for this function. Special Revenue funds, which are comprised of TCRF, Gas Tax, SB1 and Measure M monies, are also used to subsidize the costs of this program.

Public Safety expenses comprise the largest expense of the City at 35.2% of the governmental services expenses and include contract costs with the Orange County Sheriff Department for police services and emergency services, the City of Mission Viejo for animal services, crossing guards, as well as crime prevention outreach services for the City. Public Safety costs were up marginally $167,948 or 1.8%, from the prior year largely due to the increase in contract costs and purchase of law enforcement equipment. Revenues from Fines, Fees & Forfeitures and Operating Contributions & Grants assist with offsetting the costs of this program.

A portion of the increases in appropriations across all departments are due to cost of living adjustments as required by existing Contract Services agreements and the City's employee pay for performance plan.

FINANCIAL ANALYSIS OF THE CITY'S FUNDS

At year-end, the City's Governmental Funds reported a combined Fund Balance of $32,315,354, an decrease of 27.26% or $12,110,397 from the prior year. This was primarily due transfers out of the General Fund for various City Hall improvements, improvements to Iglesia Park, improvements to the Aquatic Center and AV Ranch.

Overall, City operations were consistent with prior year operating levels. The current fund balance reflects both compliance with the Management and Budget policy adopted by the City Council and the City's fiscal responsibility towards services. Funds in the amount of $2,310,394 were expended from TCRF, Gas Tax, Measure M2 and SB1 funds for its street improvement and maintenance projects, including median and pavement rehabilitation projects. The City spent $3,425,241 to maintain and enhance the City's streets, including traffic signals, street lighting, street sweeping services and rehabilitation projects.

Capital Improvement projects totaling $350,508 included Dairy Fork and Wood Canyon wetland rehabilitation projects, and facility improvements at the Aquatic Center, Aliso Viejo Center, Iglesia Park and City Hall.

General Fund Budgetary Highlights

Revenues: Actual revenues (including transfers in) received were above the final year-end budget by $682,408 or 3.8%. Property Taxes received were in line with budget estimates with a slight increase of .7% over budget. Sales tax revenue received were above the final year-end budget by 12.7% but significantly below original budget estimates primarily due to the closing of a major business, a misallocation by a local business and impacts of the pandemic.

Transient occupancy taxes received was 14.9% less than budget due impacts of the pandemic which brought occupancy rates and business travel to a halt. In addition, one of the hotels within the City also closed for construction within the same timeframe. Franchise fees received were 3.3% under budget by due to lower receipts from cable and waste collections. Adjusted for the loss in sales tax, General Fund revenues in FY 2021-2022 are expected to be consistent with the trend lines for pre-pandemic years.

Expenditures: Actual expenditures (including transfers out) incurred were $1,829,826 or 7.0% lower than the final year-end budget as a result of the proactive approach by City Council and staff, the City was able reduce costs in all programs and departments. City facilities experienced loss in revenues due to the cancellation of events and programs, expenses were curtailed to the maximum possible by curtailing operations. Overall, General Fund expenditures in FY 2021-2022 are expected to increase over FY 2020-2021 actual expenditures due to increased economic development outreach, additional software and hardware enhancements to secure the City's vital infrastructure and intellectual data, staffing and program costs associated with providing enhanced recreation programs to the community by recreation services, an increase in the Law

Enforcement contract costs, continued work efforts on the Aliso Viejo Ranch site, and an increase in personnel costs across all departments within the City.

Ending Fund Balance: Ending Fund Balance for the year decreased by 17.7% from FY 2019-2020, for a total ending balance of $27,131,163. Included in the fund balance are non-spendable funds of $76,150 and assigned funds of $27,117,572 and unassigned funds in the amount of $(62,559). The estimated fund balance at the fiscal year end of June 30, 2021 is equal to 123% of the fiscal year 2021-2022 Adopted Budget General Fund appropriations. The unassigned fund balance for the fiscal year ended June 30, 2020 is equal to -.28% of FY 2020-2021 Adopted Budget General Fund appropriations.

CAPITAL ASSET AND DEBT ADMINISTRATION

Capital Assets

As of June 30, 2021, the City had $113,977,966 invested in a broad range of capital assets, including police equipment, buildings, land, park facilities, furniture and fixtures, and roads. (See Table 4 below). Additions to capital assets being depreciated were made in the amount of $23,306,815 for the completion of the AV Ranch project and the purchase of various equipment, and furniture throughout the City. Depreciation expense in the amount of $1,023,807 was incurred in FY 2020-2021. For additional information on capital assets, refer to Note 4 of Notes to the Financial Statements.

The City of Aliso Viejo elected to use the modified approach in reporting their streets and roads network. Under the modified approach, infrastructure assets that are part of a network or subsystem of a network are not required to be depreciated if certain requirements are met, which are disclosed in the accompanying *Basic Financial Statements* and *Required Supplementary Information*. In March 2002, the City Council approved a condition level of 80 as the minimum acceptable Pavement Condition Index (PCI). The following schedule discloses a comparison between the City's assessed condition level of the streets and roads network as of June 30, 2020 and the City's adopted target level of condition.

	Actual Assessed Condition Level	Minimum Condition Level
Overall Pavement Network	82	80

Under the modified approach, GASB Statement No. 34 requires that condition assessments be performed every three years. Last completed in June 2020, the City traditionally performs an assessment every two years. It is the City's intention to have another complete assessment performed on or before fiscal year ending June 30, 2022.

During the year ended June 30, 2021, actual streets and roads maintenance project costs were $3,425,242 compared to the estimate of $3,779,360. The amount of underspending was due to project cost savings and the rollover of a median, slurry seal and rehabilitation project to FY 2021-2022.

Table 4
Capital Assets at Year End
(Net of Depreciation)

Asset Type	2021	2020
Land	$ 14,315,978	$ 14,315,978
Buildings and improvements	37,371,801	15,587,221
Equipment, furniture and fixtures	562,440	584,677
Other infrastructure	7,639,112	8,118,447
Streets and highways	53,871,430	53,871,430
Construction in progress	217,205	12,112,730
Total	$ 113,977,966	$ 104,590,483

Debt

On August 13, 2019, the City issued $12,250,000 of tax-exempt Certificates of Participation to provide financing for the construction of the Aliso Viejo Ranch. The principal is due annually in amounts ranging from $230,000 to $635,000 on November 1 of each year commencing in 2020 through the year 2049 with a coupon rate ranging from 2% to 4%.

In March of 2014, staff coordinated the refinancing of the Community Facilities District (CFD) bonds issued in conjunction with the Glenwood development. Based on the final pricing of the CFD bonds, Glenwood property owners are saving an average of $899 per year.

Non-Current Liabilities

Changes in non-current liabilities for the fiscal year ended June 30, 2021 were as follows:

Table 5
Non-Current Liabilities

	Balance at July 1, 2020	Additions	Deletions	Balance at June 30, 2021	Amount due within one year	Amount due beyond one year
Bonds payable	$ 12,250,000	$ -	$ 230,000	$ 12,020,000	$ 235,000	$ 11,785,000
Unamortized premium	968,064	-	32,269	935,795	-	935,795
Compensated absences	262,828	269,100	229,811	302,117	75,888	226,229
Total	$ 13,480,892	$ 269,100	$ 492,080	$ 13,257,912	$ 310,888	$ 12,947,024

For additional information on non-current liabilities, refer to Note 5 of the Notes to the Financial Statements.

ECONOMIC FACTORS AND NEXT YEAR'S BUDGETS AND RATES

The recovery from the massive falls in economic activity seen from April through June is continuing. While a moderate increase in GDP is expected in Q3, the pace of the recovery has slowed. Most indicators of activity are slightly below above their June quarter average including retail sales and home sales. Other categories such as leisure and entertainment experienced massive declines are now realizing recovery over the past few months.

Other factors include the slow pace at which state restrictions on activity are being eased, ongoing consumer and business caution, a tightening in lending conditions, cutbacks in state/local government spending, and a large number of permanent business closures. The rise in the number unemployed, even as the overall unemployment rate moves down, is illustrative of the longer-term damage that has occurred. The current forecast for 2021 is for average GDP growth of 5.6%, down from the 7.1% rate predicted in June. For 2022, growth is expected to be 4.1%, down from the 5.0% rate forecast made in June. For 2023, the projection is now 3.1%, up from the 2.2% rate predicted in June. Fiscal developments and the path of the virus will remain major factors influencing how strongly the economy recovers.

The Federal Open Market Committee has indicated that there will not be an increase in the Fed funds rate until inflation has reached 2% and the labor market is very strong at least through the end of 2023 as premature withdrawal of fiscal support could create a risk to the recovery.

Unemployment in Orange County has consistently been among the lowest in the State and is expected to continue this trend. In October 2021, Orange County's unemployment rate was 4.7%. The City's unemployment rate of 4.1% continues to be among the lowest among Orange County cities according to preliminary monthly labor force data provided by the State. Given the City's strong economic base, total personal income is expected to remain stable. Although the City is mostly built out, businesses continue to seek vacant spaces within the City, which bodes well for the future economic condition of the City. The City's economic development team continues to work with property owners and commercial real estate professionals to assist in marketing currently available units and development sites. In addition, with a combination of federal, state and general fund dollars, the City has proactively created programs to assist businesses and individuals within the community to combat fiscal impacts of the pandemic.

After extensive community outreach and prior efforts to develop the 7.7-acre, City owned Aliso Viejo Ranch site, the City has developed a plan to preserve and adaptively reuse the historic structures on site and add new community, agricultural, educational, and park uses to the property. By rehabilitating the historic structures on site, the project aims to pay homage to the historic character of the site and surrounding area while balancing the community's need for new and expanded community facilities. Construction began on the facility in May 2019 and was completed in May 2021.

Other projects include the construction of a STEM building and residence halls at Soka University, corporate offices, a medical office, a managed care facility, a parking garage, and professional office buildings. The budget also includes funds for economic development and community outreach, enhancements and increased recreation programs, City facility improvements and implementation of a land and asset management software.

Net General Fund operations for the adjusted FY 2020-21 budget are estimated to result in a negative cash flow of $5,839,596 to the fund balance. Adjusted for the loss in sales tax and delayed receipts for transient occupancy tax revenues, General Fund revenues in FY 2021-2022 are expected to be consistent with the trend lines for the prior year based on conservative estimates to account for recovery from the pandemic, modest growth in the economy, recent trends in construction activity and adjusted for one-time revenue receipts. The operating budget for FY 2021-22 is a modest surplus budget while maintaining current service levels. Deficit financing for City operations is primarily due to the reasons discussed above, debt service payment for the bonds and for operating costs for the AV Ranch site including personnel and building and ground maintenance. This important investment in the community has been a high priority of the City Council for many years. City reserves are customarily utilized as seed monies to assist with establishing new initiatives for the community. The City through its long-term fiscal analysis had envisioned utilizing a small portion of its reserves to assist with the operations of the AV Ranch site for five years. The projected fund balance for the General Fund at the end of FY 2020-21 is estimated to be $24.4 million and is 122.9% of the FY 2021-22 operating budget. Among local municipalities, this high level of reserve funds is extremely rare and is attributed to City Council's prudent fiscal management.

Changes adopted by the CalPERS board over the past few years included shorting the period over which actuarial gains and losses are amortized, demographic and mortality assumptions and impacts on unfunded liability. Reducing the amortization period is expected to increase average funding ratios and provide faster recovery of funded status in a market downturn. Though they continued to maintain their 2.75% inflation and economic assumptions, they did however, adjusted their discount rate to 7.375% for FY 2018-19, 7.25% for FY 2019-20, 7.0% for FY 2020-21 and 7.15% for FY 2021-22. CalPERS reported an average return on investments of 6.3% for the 5-year period ending June 30, 2020, 8.5% for the 10-year period, and 5.5% for the 20-year period. The City's annual contribution employer rate for FY 2020-21 is 10.484% of base wages and is expected to be 10.34% for fiscal year 2021-22. The City pays its projected annual employer contributions (before cost sharing) for its unfunded liability as provided by CalPERS on an annual basis which will help to reduce the volatility of the City's employer rate. This amount is projected to increase gradually over the next six years. As of the July 2020 valuation reports, as provided by CalPERS, the City's funded ratio is 84.9%.

The Capital Improvement Budget represents a balanced approach for meeting the community's current and future needs, while continuing to address priority issues expressed by the community and City Council. The Capital Improvement Program for FY 2021-22 totals approximately $2.8 million and includes improvements to streets, storm water projects, and improvements to City facilities. Staff continues to maximize the use of special revenues by actively pursuing grants and other funding opportunities from County, State, and Federal sources to help fund these programs.

CONTACTING THE CITY'S FINANCIAL MANAGEMENT

This financial report is designed to provide our citizens, taxpayers, customers, investors, and creditors with a general overview of the City's finances and to show the City's accountability for the money it receives. If you have questions about this report or need additional financial information, contact the City's Department of Financial Services, City of Aliso Viejo, 12 Journey, Suite 100, Aliso Viejo, California 92656, or call (949) 425-2520.

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CITY OF ALISO VIEJO

STATEMENT OF NET POSITION
JUNE 30, 2021

	Governmental Activities
Assets:	
Current assets:	
Cash and investments	$ 36,574,405
Receivables:	
Accounts	632,726
Accrued interest	5,327
Inventory	7,394
Prepaid costs	78,006
Due from other governments	2,155,566
Total current assets	39,453,424
Noncurrent assets:	
Capital assets not being depreciated	68,404,613
Capital assets, net of depreciation	45,573,353
Total noncurrent assets	113,977,966
Total Assets	**153,431,390**
Deferred Outflows of Resources:	
Pension related items	597,294
OPEB related items	33,577
Total Deferred Outflows of Resources	**630,871**
Liabilities:	
Current liabilities:	
Accounts payable	2,080,693
Accrued liabilities	211,156
Deposits payable	1,667,797
Retentions payable	147,949
Unearned revenue	2,850,504
Compensated absences - current portion	75,888
Long-term debt - current portion	235,000
Total current liabilities	7,268,987
Non-current liabilities:	
Compensated absences - non-current portion	226,229
Long-term debt - non-current portion	12,720,795
Net pension liability	1,035,831
Total OPEB liability	436,717
Total noncurrent liabilities	14,419,572
Total Liabilities	**21,688,559**
Deferred Inflows of Resources:	
Pension related items	61,443
OPEB related items	478,441
Total Deferred Inflows of Resources	**539,884**
Net Position:	
Net investment in capital assets	101,009,829
Restricted for:	
Community development projects	1,579,149
Community services	19,500
Public works	3,498,519
Public safety	125,356
Unrestricted	25,601,465
Total Net Position	**$ 131,833,818**

See accompanying notes to the financial statements.

CITY OF ALISO VIEJO

STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2021

Functions/ Programs	Expenses	Program Revenues: Charges for Services	Program Revenues: Operating Contributions and Grants	Program Revenues: Capital Contributions and Grants	Net (Expenses) Revenues and Changes in Net Position: Governmental Activities
Primary Government:					
Governmental activities:					
General government	$ 5,621,731	$ -	$ -	$ -	$ (5,621,731)
Public safety	9,480,235	310,419	159,660	-	(9,010,156)
Community development	1,754,782	1,400,136	585,000	-	230,354
Community services	3,695,994	2,290,904	178,668	-	(1,226,422)
Public works	6,016,332	-	3,929,195	-	(2,087,137)
Interest and fiscal charges	395,167	-	-	-	(395,167)
Total governmental activities	26,964,241	4,001,459	4,852,523	-	(18,110,259)
Total primary government	**$ 26,964,241**	**$ 4,001,459**	**$ 4,852,523**	**$ -**	**(18,110,259)**
		General revenues:			
		Taxes:			
		Property taxes, levied for general purpose			8,981,521
		Transient occupancy taxes			723,599
		Sales taxes			3,524,908
		Franchise taxes			1,672,280
		Motor vehicle in lieu - unrestricted			36,704
		Use of money and property			377,709
		Other			292,095
		Total general revenues			**15,608,816**
		Change in net position			(2,501,443)
		Net position, beginning of year			134,335,261
		Net position, end of year			**$ 131,833,818**

See accompanying notes to the financial statements.

GENERAL FUND

The General Fund has been classified as a major fund and is used to account for revenues and expenditures that are not required to be accounted for in another fund.

SPECIAL REVENUE FUNDS

Special Revenue Funds are used to account for specific revenues that are legally restricted to expenditure for a particular purpose. The following funds have been classified as major funds.

Gas Tax

This fund is used to account for the City's share of the motor vehicle gas tax imposed under the provisions of the Street and Highway Code of the State of California under Sections 2105, 2106, 2107, and 2107.5 which are legally restricted for the acquisition, construction, improvements, and maintenance of public streets. This fund previously included SB1 – RMRA funds, which is now reported as a new and separate nonmajor fund in fiscal year 2019-2020.

Aliso Viejo Center

This fund is used to account for the operations of the Aliso Viejo Center. The Aliso Viejo Center is a City owned facility that serves as an ideal venue to accommodate an array of functions, such as banquets, wedding celebrations, conferences, and corporate events.

Federal Grants

The Federal Grants Fund is used to account for Federal Grants received by the City for various projects. Grants included are FTA Grants, T.A.R.P Funds, Federal Community Development Block Grants, and Energy Efficiency and Conservation Block Grants.

CAPITAL PROJECT FUNDS

Street Improvements

This fund is used to account for the City's street improvement projects.

COP 2019

This fund is used to account for the City's purchase or construction of major capital projects funded by Certificates of Participation.

NON-MAJOR FUNDS

Other Governmental Funds

These funds constitute all other governmental funds that do not meet the major 10% and 5% test of assets, liabilities, revenues, or expenditures for the governmental funds. These funds consist of other Special Revenue Funds and Capital Projects Funds for the City.

CITY OF ALISO VIEJO

BALANCE SHEET
GOVERNMENTAL FUNDS
JUNE 30, 2021

	General Fund	Special Revenue Funds: Gas Tax	Special Revenue Funds: Aliso Viejo Center	Special Revenue Funds: Federal Grants
Assets:				
Cash and investments	$ 26,834,001	$ 923,102	$ 1,143,878	$ 2,884,694
Receivables:				
Accounts	477,080	148	17,772	-
Accrued interest	5,327	-	-	-
Inventory	-	-	7,394	-
Prepaid costs	76,150	-	1,856	-
Due from other governments	1,219,224	2,783	-	40,606
Due from other funds	351,532	-	-	-
Total Assets	**$ 28,963,314**	**$ 926,033**	**$ 1,170,900**	**$ 2,925,300**
Liabilities, Deferred Inflows of Resources and Fund Balances:				
Liabilities:				
Accounts payable	$ 900,363	$ 183,460	$ 160,039	$ 30,232
Accrued liabilities	195,878	-	-	-
Deposits payable	669,436	-	998,361	-
Due to other funds	-	-	-	-
Retentions payable	-	-	12,500	-
Unearned revenue	11,451	-	-	2,839,053
Total Liabilities	**1,777,128**	**183,460**	**1,170,900**	**2,869,285**
Deferred Inflows of Resources:				
Unavailable revenue - grants	55,023	1,924	-	40,606
Total Deferred Inflows of Resources	**55,023**	**1,924**	**-**	**40,606**
Fund Balances (Deficits):				
Non-Spendable:				
Prepaid costs and inventory	76,150	-	9,250	-
Restricted for:				
Community services	-	-	-	-
Community development projects	-	-	-	-
Capital projects	-	740,649	-	-
Public safety	-	-	-	15,409
Assigned to:				
Contingencies	2,649,388	-	-	-
Self Insurance/benefit obligations	1,150,474	-	-	-
Asset replacement	8,317,710	-	-	-
Emergencies and unanticipated traffic projects	15,000,000	-	-	-
Unassigned	(62,559)	-	(9,250)	-
Total Fund Balances	**27,131,163**	**740,649**	**-**	**15,409**
Total Liabilities, Deferred Inflows of Resources and Fund Balances	**$ 28,963,314**	**$ 926,033**	**$ 1,170,900**	**$ 2,925,300**

See accompanying notes to the financial statements.

CITY OF ALISO VIEJO

BALANCE SHEET
GOVERNMENTAL FUNDS
JUNE 30, 2021 (Continued)

	Capital Projects Funds			
	Street Improvements	COP 2019	Other Governmental Funds	Total Governmental Funds
Assets:				
Cash and investments	$ -	$ 394,223	$ 4,394,507	$ 36,574,405
Receivables:				
Accounts	-	-	137,726	632,726
Accrued interest	-	-	-	5,327
Inventory	-	-	-	7,394
Prepaid costs	-	-	-	78,006
Due from other governments	415,960	-	476,993	2,155,566
Due from other funds	-	-	-	351,532
Total Assets	**$ 415,960**	**$ 394,223**	**$ 5,009,226**	**$ 39,804,956**
Liabilities, Deferred Inflows of Resources and Fund Balances:				
Liabilities:				
Accounts payable	$ 82,345	$ 394,223	$ 330,031	$ 2,080,693
Accrued liabilities	-	-	15,278	211,156
Deposits payable	-	-	-	1,667,797
Due to other funds	198,166	-	153,366	351,532
Retentions payable	135,449	-	-	147,949
Unearned revenue	-	-	-	2,850,504
Total Liabilities	**415,960**	**394,223**	**498,675**	**7,309,631**
Deferred Inflows of Resources:				
Unavailable revenue - grants	-	-	82,418	179,971
Total Deferred Inflows of Resources	**-**	**-**	**82,418**	**179,971**
Fund Balances (Deficits):				
Non-Spendable:				
Prepaid costs and inventory	-	-	-	85,400
Restricted for:				
Community services	-	-	19,500	19,500
Community development projects	-	-	1,579,149	1,579,149
Capital projects	-	-	2,757,870	3,498,519
Public safety	-	-	109,947	125,356
Assigned to:				
Contingencies	-	-	-	2,649,388
Self Insurance/benefit obligations	-	-	-	1,150,474
Asset replacement	-	-	-	8,317,710
Emergencies and unanticipated traffic projects	-	-	-	15,000,000
Unassigned	-	-	(38,333)	(110,142)
Total Fund Balances	**-**	**-**	**4,428,133**	**32,315,354**
Total Liabilities, Deferred Inflows of Resources and Fund Balances	**$ 415,960**	**$ 394,223**	**$ 5,009,226**	**$ 39,804,956**

See accompanying notes to the financial statements.

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CITY OF ALISO VIEJO

RECONCILIATION OF THE BALANCE SHEET OF GOVERNMENTAL FUNDS TO THE STATEMENT OF NET POSITION JUNE 30, 2021

Fund Balances of Governmental Funds	**$**	**32,315,354**
Amounts reported for governmental activities in the Statement of Net Position are different because:		
Capital assets net of depreciation have not been included as financial resources in governmental fund activity.		113,977,966
Deferred inflows and outflows of resources related to pension and OPEB have not been reported in the governmental funds:		
Deferred outflows - Pension related items		597,294
Deferred outflows - OPEB related items		33,577
Deferred inflows - Pension related		(61,443)
Deferred inflows - OPEB related		(478,441)
Compensated absences that have not been included in the governmental fund activity.		(302,117)
Governmental funds report all pension contributions as expenditures, however, in the Statement of Net Position, the excess of the plan's proportionate share of the total pension liability over the proportionate share of the plan's fiduciary net position is reported as a net pension liability.		(1,035,831)
Governmental funds report all OPEB contributions as expenditures, however, in the Statement of Net Position, any excesses of the OPEB plan's total pension liability over the OPEB plan's fiduciary net position is reported as a total OPEB liability.		(436,717)
Revenues reported as unavailable revenue in the governmental funds are recognized in the Statement of Activities. These are classified as intergovernmental revenues in the Government-Wide Financial Statements.		179,971
Long-term debt has not been included in the governmental fund activity.		
Bonds payable		(12,020,000)
Unamortized premium		(935,795)
Net Position of Governmental Activities	**$**	**131,833,818**

See accompanying notes to the financial statements.

CITY OF ALISO VIEJO

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES – GOVERNMENTAL FUNDS YEAR ENDED JUNE 30, 2021

		Special Revenue Funds		
	General Fund	Gas Tax	Aliso Viejo Center	Federal Grants
Revenues:				
Taxes	$ 14,823,926	$ -	$ -	$ -
Licenses and permits	976,781	-	-	-
Intergovernmental	42,844	1,101,268	-	755,695
Charges for services	488,154	-	720,554	-
Use of money and property	940,875	19,067	-	54,585
Fines and forfeitures	310,419	-	-	-
Contributions	-	-	-	-
Developer fees	-	-	-	-
Other	79,582	-	174,254	-
Total revenues	**17,662,581**	**1,120,335**	**894,808**	**810,280**
Expenditures:				
Current:				
General government:				
City council	170,930	-	-	-
City manager	629,525	-	-	-
Human resources	212,296	-	-	-
Economic development	1,087,509	-	-	-
City clerk	445,305	-	-	-
City attorney	367,891	-	-	-
Finance	779,554	-	-	-
Information technology	731,197	-	-	-
General government	581,423	-	-	71,160
Community development:				
Community services	1,525,026	-	1,074,567	-
Planning	873,575	-	-	-
Building	686,606			
Public works	1,797,903	1,167,273	-	-
Public safety	9,103,128	-	-	-
Debt service:				
Principal payment	-	-	-	-
Interest and fiscal charges	-	-	-	-
Capital outlay	-	-	-	-
Total expenditures	**18,991,868**	**1,167,273**	**1,074,567**	**71,160**
Excess (Deficiency) of Revenues Over (Under) Expenditures	(1,329,287)	(46,938)	(179,759)	739,120
Other Financing Sources (Uses):				
Transfers in	748,282	-	179,759	-
Transfers out	(5,258,591)	-	-	(736,838)
Total other financing sources (uses)	**(4,510,309)**	**-**	**179,759**	**(736,838)**
Net change in fund balances	(5,839,596)	(46,938)	-	2,282
Fund balances, beginning of year	32,970,759	787,587	-	13,127
Fund balances, end of year	**$ 27,131,163**	**$ 740,649**	**$ -**	**$ 15,409**

See accompanying notes to the financial statements.

CITY OF ALISO VIEJO

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES – GOVERNMENTAL FUNDS YEAR ENDED JUNE 30, 2021 (Continued)

	Capital Projects Funds			
	Street Improvements	COP 2019	Other Governmental Funds	Total Governmental Funds
Revenues:				
Taxes	$ -	$ -	$ -	$ 14,823,926
Licenses and permits	-	-	-	976,781
Intergovernmental	-	-	2,087,656	3,987,463
Charges for services	-	-	990,156	2,198,864
Use of money and property	-	-	53,685	1,068,212
Fines and forfeitures	-	-	-	310,419
Contributions	-	-	100,000	100,000
Developer fees	-	-	585,000	585,000
Other	-	-	-	253,836
Total revenues	**-**	**-**	**3,816,497**	**24,304,501**
Expenditures:				
Current:				
General government:				
City council	-	-	-	170,930
City manager	-	-	-	629,525
Human resources	-	-	-	212,296
Economic development	-	-	-	1,087,509
City clerk	-	-	-	445,305
City attorney	-	-	-	367,891
Finance	-	-	-	779,554
Information technology	-	-	-	731,197
General government	-	-	34,093	686,676
Community development:				
Community services	-	-	1,067,135	3,666,728
Planning	-	-	154,649	1,028,224
Building				686,606
Public works	2,327,098	-	239,376	5,531,650
Public safety	-	-	255,161	9,358,289
Debt service:				
Principal payment	-	-	230,000	230,000
Interest and fiscal charges	-	-	427,436	427,436
Capital outlay	-	10,240,431	134,651	10,375,082
Total expenditures	**2,327,098**	**10,240,431**	**2,542,501**	**36,414,898**
Excess (Deficiency) of Revenues Over (Under) Expenditures	(2,327,098)	(10,240,431)	1,273,996	(12,110,397)
Other Financing Sources (Uses):				
Transfers in	2,327,098	10,240,431	1,077,775	14,573,345
Transfers out	-	-	(8,577,916)	(14,573,345)
Total other financing sources (uses)	**2,327,098**	**10,240,431**	**(7,500,141)**	**-**
Net change in fund balances	-	-	(6,226,145)	(12,110,397)
Fund balances, beginning of year	-	-	10,654,278	44,425,751
Fund balances, end of year	**$ -**	**$ -**	**$ 4,428,133**	**$ 32,315,354**

See accompanying notes to the financial statements.

CITY OF ALISO VIEJO

RECONCILIATION OF THE STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES OF GOVERNMENTAL FUNDS TO THE STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2021

Net Change in Fund Balances - Total Governmental Funds	**$**	**(12,110,397)**
Amounts reported for governmental activities in the Statement of Activities are different because:		
Governmental funds report capital outlays as expenditures. However, in the Government-Wide Statement of Activities, the costs of those assets are allocated over their estimated useful lives as depreciation expense.		
Capital outlay and deletions		10,375,082
Depreciation		(1,023,807)
Capital projects expensed		36,208
Compensated absences expenses reported in the Statement of Activities do not require the use of current financial resources and therefore, are not reported as expenditures in governmental funds.		(39,289)
Pension obligation expenses, net of pension deferred related amounts, reported in the Statement of Activities do not require current financial resources and therefore, are not reported as expenditures in governmental funds.		(146,851)
OPEB obligation expenses, net of OPEB deferred related amounts, reported in the Statement of Activities do not require current financial resources and therefore, are not reported as expenditures in governmental funds.		(12,955)
Revenues reported as unavailable revenue in the governmental funds are recognized in the Statement of Activities. These are classified as program revenues in the Government-Wide Financial Statements.		158,297
The issuance of long-term debt provides current financial resources in the governmental funds, but issue debt increases the long-term liabilities in the Statement of Net Position.		
Bonds payable		230,000
Unamortized premium		32,269
Change in Net Position of Governmental Activities	**$**	**(2,501,443)**

See accompanying notes to the financial statements.

CITY OF ALISO VIEJO

STATEMENT OF FIDUCIARY NET POSITION
FIDUCIARY FUNDS
JUNE 30, 2021

	Custodial Funds
Assets:	
Cash and investments	$ 53,323
Restricted cash and investments	4,503,808
Due from other governments	26,866
Total assets	4,583,997
Liabilities:	
Accounts payable	46,302
Deposits payable	5,544
Total liabilities	51,846
Net position:	
Restricted for organizations and other governments	4,532,151
Total net position	$ 4,532,151

See accompanying notes to the financial statements.

CITY OF ALISO VIEJO

STATEMENT OF CHANGES IN FIDUCIARY NET POSITION
FIDUCIARY FUNDS
YEAR ENDED JUNE 30, 2021

	Custodial Funds
Additions:	
Assessments	$ 2,033,263
Events and rentals	169,475
Interest income	5,066
Total additions	2,207,804
Deductions:	
Administrative expenses	169,475
Payments to bondholders:	
Principal	700,000
Interest	1,475,064
Total deductions	2,344,539
Net increase (decrease) in fiduciary net position	(136,735)
Net position, beginning of year, as restated (Note 15)	4,668,886
Net position, end of year	$ 4,532,151

See accompanying notes to the financial statements.

I. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Note 1: Summary of Significant Accounting Policies

The accounting policies of the City of Aliso Viejo conform to generally accepted accounting principles as applicable to governments. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles.

a. Reporting Entity

The City of Aliso Viejo (the City) was incorporated July 1, 2001, under the general laws of the State of California. The City operates under the Council-Manager form of government.

The City provides the following services as authorized by its general laws: public safety, public works, community development and general administrative services.

Generally accepted accounting principles require that these financial statements present the City and its component units, entities for which the City is considered to be financially accountable. As of the end of the reporting period the City had one blended component unit as defined by the GASB.

Aliso Viejo Public Facilities Corporation

The Aliso Viejo Public Facilities Corporation ("the Corporation") was created on July 19, 2006, for the purpose of providing for the financing of the acquisition and improvement of a building to be used as City Hall through the issuance of Certificates of Participation by the Corporation and the lease-back of the building from the Corporation to the City. Members of the City Council and management of the City act as the Corporation's governing board and exerts significant influence over its operations. Separate financial statements are not prepared for this Corporation, however, the Corporation is active as of August 2019 due to the issuance of the 2019 COPs.

b. Measurement Focus, Basis of Accounting, and Basis of Presentation

The basic financial statements of the City are composed of the following:

- Government-wide financial statements
- Fund financial statements
- Notes to the basic financial statements

Note 1: Summary of Significant Accounting Policies (Continued)

b. Measurement Focus, Basis of Accounting, and Basis of Presentation (Continued)

Government-Wide Financial Statements: Government-wide financial statements display information about the reporting government as a whole, except for its fiduciary activities. These statements include a single column for the governmental activities of the primary government. The City of Aliso Viejo has no business-type activities. Eliminations have been made in the Statement of Activities so that certain allocated expenses are recorded only once (by the function to which they were allocated). However, general government expenses have not been allocated as indirect expenses to the various functions of the City.

Government-wide financial statements are presented using the economic resources measurement focus and the accrual basis of accounting. Under the economic resources measurement focus, all (both current and long-term) economic resources and obligations of the reporting government are reported in the government-wide financial statements. Basis of accounting refers to when revenues and expenses are recognized in the accounts and reported in the financial statements. Under the accrual basis of accounting, revenues, expenses, gains, losses, assets, and liabilities resulting from exchange and exchange-like transactions are recognized when the exchange takes place.

Program revenues include charges for services, special assessments, and program payments. Program revenues are netted with program expenses in the Statement of Activities, to present the net cost of each program.

Amounts paid to acquire capital assets are capitalized as assets in the government-wide financial statements, rather than reported as an expenditure. Proceeds of long-term debt are recorded as a liability in the government-wide financial statements, rather than as another financing source. Amounts paid to reduce long-term indebtedness of the reporting government are reported as a reduction of the related liability, rather than as an expenditure.

Fund Financial Statements: The underlying accounting system of the City is organized and operated on the basis of separate funds, each of which is considered to be a separate accounting entity. The operations of each fund are accounted for with a separate set of self-balancing accounts that comprise its assets, deferred outflows of resources, liabilities, deferred inflows of resources, fund balances, revenues, and expenditures or expenses, as appropriate. Governmental resources are allocated to and accounted for in individual funds based upon the purposes for which they are to be spent and the means by which spending activities are controlled.

Fund financial statements for the primary government's governmental, and fiduciary funds are presented after the government-wide financial statements. These statements display information about major funds individually and other funds in the aggregate for governmental funds. Fiduciary statements include financial information for fiduciary funds. Fiduciary funds of the City primarily represent assets held by the City in a custodial capacity for other individuals or organizations.

Note 1: Summary of Significant Accounting Policies (Continued)

b. Measurement Focus, Basis of Accounting, and Basis of Presentation (Continued)

Governmental Funds: In the fund financial statements, governmental funds are presented using the modified-accrual basis of accounting. Their revenues are recognized when they become measurable and available as net current assets. Measurable means that the amounts can be estimated, or otherwise determined. Available means that the amounts were collected during the reporting period or soon enough thereafter to be available to finance the expenditures accrued for the reporting period. The City uses an availability period of 60 days.

Sales taxes, property taxes, franchise taxes, gas taxes, motor vehicle license fee, transient occupancy taxes, grants, and interest associated with the current fiscal period are all considered to be susceptible to accrual and so have been recognized as revenues of the current fiscal period to the extent normally collected within the availability period. Other revenue items are considered to be measurable and available where cash is received by the government.

Revenue recognition is subject to the measurable and availability criteria for the governmental funds in the fund financial statements. Exchange transactions are recognized as revenues in the period in which they are earned (i.e., the related goods or services are provided). Locally imposed derived tax revenues are recognized as revenues in the period in which the underlying exchange transaction upon which they are based takes place. Imposed non-exchange transactions are recognized as revenues in the period for which they were imposed. If the period of use is not specified, they are recognized as revenues when an enforceable legal claim to the revenues arises or when they are received, whichever occurs first. Government-mandated and voluntary non-exchange transactions are recognized as revenues when all applicable eligibility requirements have been met. Revenues, expenses, gains, losses, assets, and liabilities resulting from non-exchange transactions are recognized in accordance with the requirements of GASB Statement No. 33 which requires that local governments defer grant revenue that is not received within 60 days after the fiscal year ends to meet the “available” criteria of revenue recognition.

In the fund financial statements, governmental funds are presented using the current financial resources measurement focus. This means that only current assets and current liabilities are generally included on their balance sheets. The reported fund balance (net current assets) is considered to be a measure of “available spendable resources.” Governmental fund operating statements present increases (revenues and other financing sources) and decreases (expenditures and other financing uses) in net current assets. Accordingly, they are said to present a summary of sources and uses of “available spendable resources” during a period.

Non-current portions of long-term receivables due to governmental funds are reported on their balance sheets in spite of their spending measurement focus. Special reporting treatments are used to indicate, however, that they should not be considered “available spendable resources,” since they do not represent net current assets.

Note 1: Summary of Significant Accounting Policies (Continued)

b. Measurement Focus, Basis of Accounting, and Basis of Presentation (Continued)

Recognition of governmental fund type revenue represented by non-current receivables are deferred until they become current receivables. Non-current portions of other long-term receivables are classified as non spendable fund balance.

Because of their spending measurement focus, expenditure recognition for governmental fund types excludes amounts represented by non-current liabilities. Since they do not affect net current assets, such long-term amounts are not recognized as governmental fund type expenditures or fund liabilities.

Amounts expended to acquire capital assets are recorded as expenditures in the year that resources were expended, rather than as fund assets. The proceeds of long-term debt are recorded as another financing source rather than as a fund liability. Amounts paid to reduce long-term indebtedness are reported as fund expenditures.

When both, restricted and unrestricted resources, are combined in a fund, expenses are considered to be paid first from restricted resources, and then from unrestricted resources.

c. Fund Classifications

The City reports the following major governmental funds:

General Fund: The General Fund is the general operating fund of the City. It is used to account for all financial resources except those required to be accounted for in another fund.

Gas Tax Special Revenue Fund: This fund is used to account for the City's share of the motor vehicle gas tax imposed under the provisions of the Street and Highway Code of the State of California under Sections 2105, 2106, 2107, and 2107.5 which are legally restricted for the acquisition, construction, improvements, and maintenance of public streets.

Aliso Viejo Center Special Revenue Fund: This fund is used to account for the operations of the Aliso Viejo Center. The Aliso Viejo Center is a City owned facility that serves as an ideal venue to accommodate an array of functions, such as banquets, wedding celebrations, conferences and corporate events. Revenues are generated from events held at the facility.

Federal Grants Fund: This fund is used to account for Federal Grants received by the City for various projects. Grants included are FTA Grants, T.A.R.P Funds, Federal Community Development Block Grants, and Energy Efficiency and Conservation Block Grants.

Street Improvements Capital Projects Fund: This fund is used to account for the City's street improvement projects.

Certificates of Participation 2019 Fund: This fund is used to account for capital expenditures associated with the development and construction of the Aliso Viejo Ranch. The capital costs associated with the Aliso Viejo Ranch project include the construction of buildings, landscaping, parking lot, and hydroponic farm.

Note 1: Summary of Significant Accounting Policies (Continued)

c. Fund Classifications (Continued)

Additionally, the government reports the following fund types:

Capital Projects Funds: These funds are used to account for the financial resources used for the acquisition of capital assets and are funded by the General Fund, Gas Tax Fund, Measure M Fund, and the Federal Grants Fund.

Custodial Funds: These funds are used to account for special assessments received for which the City acts as an agent for all Community Facilities District debt activity.

d. Cash and Investments

Investments are reported in the accompanying statement of net position at fair value. Changes in fair value that occur during a fiscal year are recognized as investment income reported for that fiscal year. Investment income includes interest earnings and changes in fair value. The City pools cash and investments of all funds. Each fund's share in this pool is displayed in the accompanying financial statements as cash and investments. Investment income earned by the pooled investments is allocated to the various funds based on each fund's average cash and investment balance, except for investment income associated with funds not legally required to receive pooled investment income which has been assigned to and recorded as revenue of the General Fund, as provided by California Government Code Section 53647.

e. Prepaids

Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaid items in both, the government-wide and fund financial statements. Prepaid items are reported in the governmental funds under the consumption method and are offset by a reservation of fund balance to indicate that they are not spendable for appropriation and are not expendable financial resources.

f. Capital Assets

Capital assets (including infrastructure) are recorded at cost where historical records are available and at an estimated original cost where no historical records exist. Donated capital assets, donated works of art and similar items, and capital assets received in a service concession arrangement are reported at acquisition value rather than fair value. Generally, capital asset purchases in excess of $5,000 are capitalized if they have an expected useful life of three years or more.

Capital assets include public domain (infrastructure) general capital assets consisting of certain improvements including roads, streets, sidewalks, medians, and storm drains. The City has elected to include infrastructure capital assets in their entirety (e.g., prior to 1980) in compliance with requirements of GASB Statement No. 34.

Note 1: Summary of Significant Accounting Policies (Continued)

f. Capital Assets (Continued)

Capital assets used in operations are depreciated over their estimated useful lives, except for streets, of which the City reports based on using the modified approach. The City uses the straight-line method in the government-wide financial statements for depreciating storm drains, park equipment, buildings, equipment and furniture, and leasehold improvements. Depreciation is charged as an expense against operations and accumulated depreciation is reported on the respective statement of net position. The range of lives used for depreciation purposes for each capital asset class are as follows:

Items	Useful Life
Buildings	100 years
Improvements	3-50 years
Equipment and furniture	5 years
Infrastructure:	
Sidewalks	20-50 years
Curb and gutters	20-50 years
Medians	20-50 years
Traffic signals	15 years
Street signs	15 years
Storm drains	20-50 years
Park equipment	10-50 years

The City of Aliso Viejo met all the criteria required by GASB Statement No. 34 to report their streets and roads network using the modified approach, which allows those infrastructure assets to be non-depreciable. Hence, all expenditures made for the streets and roads asset network (except for additions and improvements) are expensed in the period incurred. Additions or improvements to the streets and roads network assets that increase the capacity or efficiency of those assets (rather than preserve the useful life) are capitalized. The City elected to set their minimum acceptable level of condition at 80 for all streets and roads network systems based on their pavement management system scale of 1 to 100. The City plans to test/assess the condition level at least every three years. See the accompanying Required Supplementary Information section for additional information.

g. Deferred Outflows/Inflows of Resources

In addition to assets, the statement of financial position will sometimes report a separate section for deferred outflows of resources. This separate financial statement element, deferred outflows of resources, represents a consumption of net position that applies to a future period(s) and so will not be recognized as an outflow of resources (expense/ expenditure) until then. The City has deferred outflows of resources related to pension and OPEB items.

Note 1: Summary of Significant Accounting Policies (Continued)

g. Deferred Outflows/Inflows of Resources (Continued)

In addition to liabilities, the statement of financial position will sometimes report a separate section for deferred inflows of resources. This separate financial statement element, deferred inflows of resources, represents an acquisition of net position that applies to a future period(s) and so will not be recognized as an inflow of resources (revenue) until that time. The City of Aliso Viejo has two types of items. The item, unavailable revenue, is reported only in the governmental funds balance sheet. The governmental funds report unavailable revenues from various sources such as, grant revenue, taxes, and other special revenue. These amounts are deferred and recognized as an inflow of resources in the period that the amounts become available. The other item is deferred pension and OPEB related items.

h. Net Pension Liabilities

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, pension expense, information about the fiduciary net position of the Plan, and additions to/deductions from the Plan's fiduciary net position have been determined on the same basis. For this purpose, benefit payments (including refunds of employee contributions) are recognized when currently due and payable in accordance with the benefit terms. Investments are reported at fair value.

Generally accepted accounting principles requires that the reported results must pertain to liability and asset information within certain defined timeframes. For this report, the following timeframes are used.

Valuation Date (VD) June 30, 2019
Measurement Date (MD) June 30, 2020
Measurement Period (MP) July 1, 2019 to June 30, 2020

i. Compensated Absences

In accordance with generally accepted accounting principles, an employee benefits payable liability is recorded for unused vacation and similar compensatory leave balances. The employee's entitlements to these balances are attributable to services already rendered and it is probable that virtually all of these balances will be liquidated by either paid time off or payments upon termination or retirement.

Note 1: Summary of Significant Accounting Policies (Continued)

j. Property Taxes

Under California law, property taxes are assessed and collected by the counties up to 1% of assessed value, plus other increases approved by the voters. The property taxes go into a pool, and are then allocated to the cities based on complex formulas. Accordingly, the City recognizes as revenue only those taxes which are received within 60 days after year end.

The property tax calendar is as follows:

Lien Date:	January 1
Levy Date:	July 1
Due Date:	First Installment - November 1
	Second Installment - February 1
Delinquent Date:	First Installment - December 10
	Second Installment - April 10

k. Use of Estimates

The preparation of basic financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenditures during the reporting period. Actual results could differ from those estimates.

l. Net Position Flow Assumption

Sometimes the City will fund outlays for a particular purpose from both, restricted (e.g., restricted bond or grant proceeds) and unrestricted resources. In order to calculate the amounts to report as restricted – net position and unrestricted – net position in the government-wide, a flow assumption must be made about the order in which the resources are considered to be applied. It is the City's policy to consider restricted – net position to have been depleted before unrestricted – net position is applied.

m. Fund Balance Flow Assumption

Sometimes the City will fund outlays for a particular purpose from both, restricted and unrestricted resources (the total of committed, assigned, and unassigned fund balance). In order to calculate the amounts to report as restricted, committed, assigned, and unassigned fund balance in the governmental fund financial statements, a flow assumption must be made about the order in which the resources are considered to be applied. It is the government's policy to consider restricted fund balance to have been depleted before using any of the components of unrestricted fund balance. Further, when the components of unrestricted fund balance can be used for the same purpose, committed fund balance is depleted first, followed by assigned fund balance. Unassigned fund balance is applied last.

Note 1: Summary of Significant Accounting Policies (Continued)

n. Fund Balance

In the fund financial statements, government funds report the following fund balance classification:

Nonspendable include amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.

Restricted include amounts that are constrained on the use of resources by either (a) external creditors, grantors, contributors, or laws of regulations of other governments or (b) by law through constitutional provisions or enabling legislation.

Committed include amounts that can only be used for specific purposes pursuant to constraints imposed by formal action of the government's highest authority, City Council. The formal action that is required to be taken to establish, modify, or rescind a fund balance commitment is a resolution.

Assigned include amounts that are constrained by the government's intent to be used for specific purposes, but are neither restricted nor committed. The City Manager and/or Financial Services Director is authorized to assign amounts to a specific purpose, which was established by the governing through a resolution.

Unassigned include the residual amounts that have not been restricted, committed, or assigned to specific purposes.

An individual governmental fund could include nonspendable resources and amounts that are restricted or unrestricted (committed, assigned, or unassigned) or any combination of those classifications. Restricted or unrestricted amounts are to be considered spent when an expenditure is incurred for purposes for which both restricted and unrestricted fund balance is available and committed, assigned, then unassigned amounts are considered to have been spent when an expenditure is incurred for purposes for which amounts in any of those unrestricted fund balance classifications can be used.

In other governmental funds it is not appropriate to report a positive unassigned fund balance amount. However, in governmental funds other than the general fund, if expenditures incurred for specific purposes exceed the amounts that are restricted, committed, or assigned to those purposes, it may be necessary to report a negative unassigned fund balance in that fund.

Note 1: Summary of Significant Accounting Policies (Continued)

o. Other Postemployment Benefits (OPEB)

For purposes of measuring the net OPEB liability, deferred outflows of resources and deferred inflows of resources related to OPEB, OPEB expense, information about the fiduciary net position of the City's plan (OPEB Plan), and additions to/deductions from the OPEB Plan's fiduciary net position have been determined on the same basis. For this purpose, benefit payments are reported at fair value.

Generally accepted accounting principles require that the reported results must pertain to liability and asset information within certain defined timeframes. For this report, the following timeframes are used:

Valuation Date (VD) June 30, 2019
Measurement Date (MD) June 30, 2020
Measurement Period (MP) July 1, 2019 to June 30, 2020

p. Implementation of New GASB Pronouncement

The Governmental Accounting Standards Board (GASB) has issued Statement No. 84, *Fiduciary Activities*. The primary objective of this statement is to improve guidance regarding the identification of fiduciary activities for accounting and financial reporting purposes and how those activities should be reported.

As a result, activities previously reported as agency funds (refundable deposits and community trust) are now grouped with the General Fund. The City's remaining fiduciary activities include the CFD 2005-01 fund, which meets the criteria to be reported as a custodial fund.

II. DETAILED NOTES ON ALL FUNDS

Note 2: Cash and Investments

Cash and investments as of June 30, 2021, are classified in the accompanying financial statements as follows:

Statement of Net Position:	
Cash and investments	$ 36,574,405
Statement of Fiduciary Net Position:	
Cash and investments	53,323
Cash and investments held by fiscal agent	4,503,808
Total cash and investments	$ 41,131,536

Cash and investments as of June 30, 2021 consists of the following:

Deposits with financial institutions	$ 15,676,982
Cash on hand	2,655
Investments	25,451,899
Total cash and investments	$ 41,131,536

Investments Authorized by the California Government Code and the City's Investment Policy

The following table identifies the investment types that are authorized for the City by the California Government Code and the City's investment policy. The table also identifies certain provisions of the California Government Code (or the City's investment policy, if more restrictive) that address interest rate risk, credit risk, and concentration of credit risk. This table does not address investments of debt proceeds held by bond trustee that are governed by the provisions of debt agreements of the City, rather than the general provisions of the California Government Code or the City's investment policy. The City Treasurer may waive the collateral requirement for deposits that are fully insured up to $250,000 by the FDIC.

Note 2: Cash and Investments (Continued)

Investment Types Authorized by State Law	Authorized by Investment Policy	Maximum Maturity	Maximum Percentage of Portfolio	Maximum Investment in One Issuer*
Local Agency Bonds	No	5 years	None	None
U.S. Treasury Obligations	Yes	5 years	75%	None
U.S. Agency Securities	Yes	5 years	60%	$ 7,000,000
Banker's Acceptances	Yes	180 days	20%	3,000,000
Commercial Paper	Yes	270 days	20%	10%
Certificates of Deposit	Yes	5 years	75%	15,000,000
Negotiable Certificates of Deposit	Yes	3 years	20%	3,000,000
Repurchase Agreements	Yes	30 days	10%	2,000,000
Reverse Repurchase Agreements	No	30 days	10% of base value	2,000,000
Medium-Term Notes	Yes	5 years	10%	1,000,000
Mutual Funds	No	None	20%	10%
Money Market Mutual Funds	Yes	None	10%	1,000,000
Mortgage Pass-Through Securities	No	5 years	20%	None
County Pooled Investment Fund	No	None	None	None
Local Agency Investment Fund	Yes	None	100%	75,000,000
JPA Pools (other investment pools)	No	None	None	None

* Based on state law requirements or investment policy requirements, whichever is more restrictive.

Investments Authorized by Debt Agreements

Investment of debt proceeds held by bond trustee are governed by provisions of the debt agreements, rather than the general provisions of the California Government Code or the City's investment policy. The table below identifies the investment types that are authorized for investments held by bond trustee. The table also identifies certain provisions of these debt agreements that address interest rate risk, credit risk, and concentration of credit risk.

Investment Types Authority by State Law	Maximum Maturity	Maximum Percentage of Portfolio	Maximum Investment in One Issuer*
U.S. Treasury Obligations	5 years	75%	None
U.S. Agency Securities	5 years	60%	35%
Banker's Acceptances	180 days	20%	$ 3,000,000
Commercial Paper	270 days	20%	None
Money Market Funds	N/A	10%	None
Investment Agreements	None	None	None
Defeasance Obligations	None	None	None
Municipal Obligations	None	None	None
Local Agency Investment Fund	None	None	75,000,000

Note 2: Cash and Investments (Continued)

Interest Rate Risk

Interest rate risk is the risk that changes in market interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value is to changes in market interest rates. Information about the sensitivity of the fair values of the City's investments to market interest rate fluctuations is provided by the following table that shows the distribution of the City's investments by maturity:

		Remaining Maturity		
Investment Type	Fair Value	12 Months or Less	13 to 24 Months	25 to 60 Months
State Investment Pool	$ 6,525,625	$ 6,525,625	$ -	$ -
Negotiable Certificates of Deposit	6,548,736	1,843,404	1,004,717	3,700,615
Federal National Mortgage Assn.	501,790	501,790	-	-
Federal Home Loan Mtg Corp	492,037	-	-	492,037
Federal Home Loan Bank	1,032,422	-	509,539	522,883
Federal Farm Credit Bank	2,259,849	503,393	500,896	1,255,560
U.S. Treasury	1,524,294	500,895	508,223	515,176
Medium Term Notes	2,072,428	-	-	2,072,428
Held By Fiscal Agent:				
U.S. Treasury	2,276,241	2,276,241	-	-
Federal Home Loan Bank	2,218,477	949,147	-	1,269,330
Total	$ 25,451,899	$ 13,100,495	$ 2,523,375	$ 9,828,029

Credit Risk

Generally, credit risk is the risk that an issuer of an investment will not fulfill its obligation to the holder of the investment. This is measured by the assignment of a rating by a nationally recognized statistical rating organization. Presented on the next page is the minimum rating required by (where applicable) the California Government Code, the City's investment policy, or debt agreements and the actual rating as of year-end for each investment type:

Note 2: Cash and Investments (Continued)

Investment Type	Total	Minimum Legal Rating	Ratings as of Year End		
			Aaa	Aa1	Not Rated
State Investment Pool	$ 6,525,625	N/A	$ -	$ -	$ 6,525,625
Negotiable Certificates of Deposit	6,548,736	N/A	-	-	6,548,736
Federal National Mortgage Assn.	501,790	Aaa	501,790	-	-
Federal Home Loan Mtg Corp	492,037	Aaa	492,037	-	-
Federal Home Loan Bank	1,032,422	Aaa	1,032,422	-	-
Federal Farm Credit Bank	2,259,849	Aaa	2,259,849	-	-
U.S. Treasury	1,524,294	Aaa	1,524,294	-	-
Medium Term Notes	2,072,428	Aaa	2,072,428	-	-
Held By Fiscal Agent:					
U.S. Treasury	2,276,241	Aaa	2,276,241	-	-
Federal Home Loan Bank	2,218,477	Aaa	2,218,477	-	-
Total	$ 25,451,899		$12,377,538	$ -	$ 13,074,361

Concentration of Credit Risk

The investment policy of the City contains no limitations on the amount that can be invested in any one issuer beyond that stipulated by the California Government Code. Investments in any one issuer (other than U.S. Treasury securities, mutual funds and external investment pools) that represent 5% or more of the total City's investments are as follows:

Issuer	Investment Type	Reported amount	Percentage of portfolio
Federal Farm Credit Bank	Federal Agency Securities	$ 2,259,849	8.9%
Federal Home Loan Bank	Federal Agency Securities	3,250,899	12.8%

Custodial Credit Risk

Custodial credit risk for deposits is the risk that in the event of the failure of a depository financial institution, a government will not be able to recover its deposits or will not be able to recover collateral securities that are in the possession of an outside party. The custodial credit risk for investments is the risk that in the event of the failure of the counterparty (e.g., broker-dealer) to a transaction, a government will not be able to recover the value of its investment or collateral securities that are in the possession of another party. The California Government Code and the City's investment policy do not contain legal or policy requirements that would limit the exposure to custodial credit risk for deposits or investments, other than the following provision for deposits: The California Government Code requires that a financial institution secure deposits made by state or local governmental units by pledging securities in an undivided collateral pool held by a depository regulated under state law (unless so waived by the governmental unit). The market value of the pledged securities in the collateral pool must equal at least 110% of the total amount deposited by the public agencies. California law also allows financial institutions to secure City deposits by pledging first trust deed mortgage notes having a value of 150% of the secured public deposits.

Note 2: Cash and Investments (Continued)

Investment in State Investment Pool

The City is a voluntary participant in the Local Agency Investment Fund (LAIF) that is regulated by the California Government Code under the oversight of the Treasurer of the State of California. The fair value of the City's investment in this pool is reported in the accompanying financial statements at an amount based upon the City's pro-rata share of the fair value provided by LAIF for the entire LAIF portfolio (in relation to the amortized cost of that portfolio). The balance available for withdrawal is based on the accounting records maintained by LAIF, which are recorded on an amortized cost basis. Currently, LAIF does not have an investment rating.

Fair Value Measurements

The City categorizes its fair value measurements within the fair value hierarchy established by generally accepted accounting principles. The hierarchy is based on the valuation inputs used to measure the fair value of the asset. Level 1 inputs are quoted prices in active markets for identical assets; Level 2 inputs are significant other observable inputs; Level 3 inputs are significant unobservable inputs.

The City has the following recurring fair value measurements as of June 30, 2021:

		Fair Value Measurement Using		
	Total	Level 1	Level 2	Level 3
Negotiable Certificates of Deposit	$ 6,548,736	$ -	$ 6,548,736	$ -
Federal National Mortgage Assn.	501,790	501,790	-	-
Federal Home Loan Mtg Corp	492,037	492,037	-	-
Federal Home Loan Bank	1,032,422	1,032,422	-	-
Federal Farm Credit Bank	2,259,849	2,259,849	-	-
U.S. Treasury	1,524,294	1,524,294	-	-
Medium Term Notes	2,072,428	2,072,428	-	-
Held By Fiscal Agent:				
U.S. Treasury	2,276,241	2,276,241	-	-
Federal Home Loan Bank	2,218,477	2,218,477	-	-
Total investments by fair value level	18,926,274	$ 12,377,538	$ 6,548,736	$ -
Investments not subject to fair value:				
State Investment Pool	6,525,625			
Total	$ 25,451,899			

The following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used:

Level 1: Inputs are quoted prices in active markets for identical assets.

Level 2: Quoted prices for similar assets or liabilities in active markets

Note 3: Interfund Receivables, Payables and Transfers

Due To/From Other Funds

Interfund receivables and payables as of June 30, 2021, consisted of the following:

	Due To Other Funds		
Due From Other Funds	Street Improvements	Other Governmental Funds	Total
General Fund	$ 198,166	$ 153,366	$ 351,532
	$ 198,166	$ 153,366	$ 351,532

The amount due from the General Fund to other governmental funds was to cover negative cash and are expected to be repaid within one year.

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Note 3: Interfund Receivables, Payables and Transfers (Continued)

Interfund Transfers

Interfund transfers for the year ended June 30, 2021, consisted of the following:

	Transfers Out			
Transfers In	General Fund	Federal Grants	Other Governmental Funds	Total
General Fund	$ 630,336	$ -	$ 117,946	$ 748,282
AV Center	179,759	-	-	179,759
Street Improvements	-	-	2,327,098	2,327,098
COP 2019	4,101,388	103,624	6,035,419	10,240,431
Other Governmental Funds	347,108	633,214	97,453	1,077,775
Total	$ 5,258,591	$ 736,838	$ 8,577,916	$14,573,345

Transfers into the General Fund include funds from the CAREs act, CDBG admin hours reimbursement. Transfers out of the General Fund included funding the City Hall Roof Replacement costs and Wetland and Dairy Fork storm water projects. Transfers out of the General Fund also include various City Hall improvements, improvements to the Aquatic Center, AV Ranch improvements and Iglesia Park improvements and interest payments for the City's 2019 COP's. Transfers in to the Recreation Services included funds to cover the operational gap for the rec. services. Transfer out of the Traffic Congestion Relief Fund included reimbursements for completed street and capital projects. Transfer out of the Measure M, SB1-RMRA and Other Grants included median improvement, slurry seal, signal improvement and a rehabilitation projects. Transfers out of the Development Impact fund included construction costs for the Aliso Viejo Ranch project. Transfers out of the Technology Fund included improvements to City Hall audio/visual and broadcasting projects. Transfers out of the Debt Service Foundation included interest and principal payments for the City's 2019 COP's. Transfers out of the AV Ranch Foundation included construction and improvements to the AV Ranch Center. Transfers in to the Conference and Aquatics Centers included funds to cover the operational gap for the facility Conference and Aquatics Centers. Transfer in to the Street Improvements fund included funds to cover costs for median improvement, slurry seal, signal improvement and a rehabilitation projects. Transfers in to Capital Improvements included funds for various City Hall improvements, park improvements and upgrades. Transfer in to Debt Service and COPs included interest payments on the 2019 COP.

Note 4: Capital Assets

Capital asset activity for the year ended June 30, 2021, was as follows:

	Balance July 1, 2020	Additions	Deletions*	Balance June 30, 2021
Capital assets, not being depreciated:				
Land	$ 14,315,978	$ -	$ -	$ 14,315,978
Infrastructure - streets	53,871,430	-	-	53,871,430
Construction in progress*	12,112,730	10,375,082	(22,270,607)	217,205
Total capital assets, not being depreciated	80,300,138	10,375,082	(22,270,607)	68,404,613
Capital assets, being depreciated:				
Buildings	19,283,513	21,881,296	-	41,164,809
Improvements	475,903	246,772	-	722,675
Equipment	866,312	173,737	-	1,040,049
Furniture	269,024	5,010	-	274,034
Infrastructure - other*	26,136,674	-	-	26,136,674
Total capital assets, being depreciated	47,031,426	22,306,815	-	69,338,241
Accumulated Depreciation:				
Buildings	(3,933,243)	(329,689)	-	(4,262,932)
Improvements	(238,952)	(13,799)	-	(252,751)
Equipment	(513,632)	(153,602)	-	(667,234)
Furniture	(37,027)	(47,382)	-	(84,409)
Infrastructure - other	(18,018,227)	(479,335)	-	(18,497,562)
Total accumulated depreciation	(22,741,081)	(1,023,807)	-	(23,764,888)
Total capital assets, being depreciated, net	24,290,345	21,283,008	-	45,573,353
Capital assets, net	$ 104,590,483	$ 31,658,090	$ (22,270,607)	$ 113,977,966

*Other infrastructure consisted of sidewalks, curbs and gutters, medians, traffic signals, street signs, storm drains, and park equipment. Construction in progress consists primarily of additions to infrastructure and buildings. Certain deletions in the capital assets activity schedule shown above are the result of reclassifications of assets into different classes of assets. If assets that are disposed of are not fully depreciated at the time of the disposal, these deletions in the asset classes may not be accompanied by a like decrease in the accumulated depreciation for the same asset class.

General government	$ 413,482
Public safety	121,946
Public works	484,682
Community services	3,697
Total	$ 1,023,807

Note 5: Non-current Liabilities

Compensated Absences

The City's policies relating to employee leave benefits are described in Note 1.i. This liability will be paid in future years from future resources primarily from the General Fund. As of June 30, 2021, the outstanding balance was $302,117.

Changes in non-current liabilities for the fiscal year ended June 30, 2021, were as follows:

	Beginning Balance at July 1, 2020	Additions	Deletions	Ending Balance at June 30, 2021	Amount Due Within One Year
Compensated absences	$ 262,828	$ 269,100	$ 229,811	$ 302,117	$ 75,888

Bonds Payable – Direct Placement

On July 31, 2019, the City issued the 2019 Certificates of Participation (COP) in the amount of $12,250,000 in order to finance a portion of the construction of improvements to the Aliso Viejo Ranch and pay delivery costs incurred in connection with the execution, delivery and sale of the Certificates. The 2019 COP mature annually on November 1 through 2039 and bear interest ranging from 2.0% to 4.0%. In the event of default, the City waives all rights to any rentals received by the trustee through re-letting of the lease agreement. The City agrees to pay any and all costs, loss, or damage, howsoever occurring, as a result of any re-entry or re-letting.

	Beginning Balance at July 1, 2020	Additions	Deletions	Ending Balance at June 30, 2021	Amount Due Within One Year
Bonds payable	$ 12,250,000	$ -	$ 230,000	$ 12,020,000	$ 235,000
Unamortized premium	968,064	-	32,269	935,795	-
Total	$ 13,218,064	$ -	$ 262,269	$ 12,955,795	$ 235,000

The annual debt service requirements for the 2019 COPs outstanding at June 30, 2021 are as follows:

Year Ending June 30,	Principal	Interest	Total
2022	$ 235,000	$ 420,050	$ 655,050
2023	240,000	415,350	655,350
2024	250,000	405,750	655,750
2025	260,000	395,750	655,750
2026	270,000	385,350	655,350
2027 - 2031	1,530,000	1,755,350	3,285,350
2032 - 2036	1,855,000	1,423,950	3,278,950
2037 - 2041	2,265,000	1,021,550	3,286,550
2042 - 2046	2,675,000	611,250	3,286,250
2047 - 2050	2,440,000	185,550	2,625,550
Total	$ 12,020,000	$ 7,019,900	$ 19,039,900

Note 6: Debt Without Government Commitment Community Facilities District No. 2005-01

In November 2007, the City issued $34,070,000 in Special Tax Bonds for Community Facilities District No. 2005-01 (Glenwood at Aliso Viejo). The bonds were issued to finance the acquisition and improvement of various public facilities within Community Facilities District 2005-01 (Glenwood at Aliso Viejo). The City later refinanced the 2007 Special Tax Bonds with the issuance of the 2014 Special Tax Bonds.

On September 1, 2014, the City issued $32,270,000 in Special Tax Bonds for Community Facilities District No. 2005-01 (Glenwood at Aliso Viejo). Interest payments commenced on September 1, 2014, and are paid semiannually thereafter on September 1 and March 1 of each year. Principal payments commence on September 1, 2014, and are paid annually in amounts ranging from $295,000 to $2,850,000 until September 1, 2038. The bonds were issued to refinance the outstanding 2007 Special Tax Bonds and cause the early redemption thereof on March 1, 2014. The principal balance outstanding at June 30, 2021 is $28,950,000.

Note 7: Pension Plan

A. General Information about the Pension Plan

Plan Description

All qualified permanent and probationary employees are eligible to participate in the Public Agency Cost-Sharing Multiple-Employer Defined Benefit Pension Plan (Plan) administered by the California Public Employees' Retirement System (CalPERS.) The Plan consists of individual rate plans (benefit tiers) within a safety risk pool (police and fire) and a miscellaneous risk pool (all other). Plan assets may be used to pay benefits for any employer rate plan of the safety and miscellaneous pools. Accordingly, rate plans within the safety or miscellaneous pools are not separate plans under GASB Statement No. 68. Individual employers may sponsor more than one rate plan in the miscellaneous or safety risk pools. The City sponsors two miscellaneous rate plans. Benefit provisions under the Plan are established by State statute and City resolution. CalPERS issues publicly available reports that include a full description of the pension plan regarding benefit provisions, assumptions and membership information that can be found on the CalPERS's website at www.calpers.ca.gov.

Benefits Provided

CalPERS provides service retirement and disability benefits, annual cost of living adjustments, and death benefits to plan members, who must be public employees and beneficiaries. Benefits are based on years of credited service, equal to one year of full time employment. Members with five years of total service are eligible to retire at age 50 with statutorily reduced benefits. All members are eligible for non-duty disability benefits after 5 years of service. The death benefit is one of the following: the Basic Death Benefit, the 1957 Survivor Benefit, or the Optional Settlement 2W Death Benefit. The cost of living adjustments for each plan are applied as specified by the Public Employees' Retirement Law.

Note 7: Pension Plan (Continued)

A. General Information about the Pension Plan (Continued)

The Plan operates under the provisions of the California Public Employees' Retirement Law (PERL), the California Public Employees' Pension Reform Act of 2013 (PEPRA), and the regulations, procedures and policies adopted by the CalPERS Board of Administration. The Plan's authority to establish and amend the benefit terms are set by the PERL and PEPRA, and may be amended by the California state legislature and in some cases require approval by the CalPERS Board.

The Plan's provisions and benefits in effect at June 30, 2021 are summarized as follows:

	Miscellaneous	PEPRA Miscellaneous
Hire Date	And prior to January 1, 2013*	On or after January 1, 2013
Benefit formula	2% @ 55	2% @ 62
Benefit vesting schedule	5 years of service	5 years of service
Benefit payments	monthly for life	monthly for life
Retirement age	50 - 63	52 - 67
Monthly benefits, as a % eligible compensation	1.426% - 2.418%	1.000% - 2.500%
Required employer contribution rates	10.484%	7.732%

Contributions

Section 20814(c) of the California Public Employees' Retirement Law (PERL) requires that the employer contribution rates for all public employers be determined on an annual basis by the actuary and shall be effective on the July 1 following notice of a change in the rate. The total plan contributions are determined through CalPERS's annual actuarial valuation process. For public agency cost-sharing plans covered by either the Miscellaneous or Safety risk pools, the Plan's actuarially determined rate is based on the estimated amount necessary to pay the Plan's allocated share of the risk pool's costs of benefits earned by employees during the year, and any unfunded accrued liability. The employer is required to contribute the difference between the actuarially determined rate and the contribution rate of employees. Employer contribution rates may change if plan contracts are amended. Payments made by the employer to satisfy contribution requirements that are identified by the pension plan terms as plan member contribution requirements are classified as plan member contributions. Employer Contributions to the Plan for the fiscal year ended June 30, 2021 were $319,112. The actual employer payments of $274,755 made to CalPERS by the City during the measurement period ended June 30, 2020 differed from the City's proportionate share of the employer's contributions of $287,721 by $12,966, which is being amortized over the expected average remaining service lifetime in the Public Agency Cost-Sharing Multiple Employer Plan.

B. Net Pension Liability

The City's net pension liability for the Plan is measured as the total pension liability, less the pension plan's fiduciary net position. The net pension liability of the Plan is measured as of June 30, 2020, using an annual actuarial valuation as of June 30, 2019 rolled forward to June 30, 2020 using standard update procedures. A summary of principal assumptions and methods used to determine the net pension liability is as follows.

Note 7: Pension Plan (Continued)

B. Net Pension Liability (Continued)

Actuarial Methods and Assumptions Used to Determine Total Pension Liability

Valuation Date	June 30, 2019
Measurement Date	June 30, 2020
Actuarial Cost Method	Entry Age Normal in accordance with the requirements of GASB 68
Asset Valuation Method	Market Value of Assets
Actuarial Assumptions:	
Discount Rate	7.15%
Inflation	2.50%
Salary Increases	Varies by entry age and service
Mortality Rate Table (1)	Derived using CalPERS' membership data for all Funds
Post Retirement Benefit Increase	The lesser of contract COLA or 2.5% until purchasing power protection allowance floor on purchasing power applies, 2.5% thereafter

(1) The mortality table used was developed based on CalPERS' specific data. The probabilities of mortality are based on the 2017 CalPERS Experience Study for the period from 1997 to 2015. Pre-retirement and Post-retirement mortality rates include 15 years of projected mortality improvement using 90% of Scale MP-2016 published by the Society of Actuaries. For more details on this table, please refer to the CalPERS Experience Study and Review of Actuarial Assumptions report from December 2017 that can be found on the CalPERS website.

All other actuarial assumptions used in the June 30, 2019 valuation were based on the results of an actuarial experience study for the period from 1997 to 2015, including updates to salary increase, mortality and retirement rates. The Experience Study report can be obtained at CalPERS's website at www.calpers.ca.gov.

Long-term Expected Rate of Return

The long-term expected rate of return on pension plan investments was determined using a building-block method in which expected future real rates of return (expected returns, net of pension plan investment expense and inflation) are developed for each major asset class.

In determining the long-term expected rate of return, CalPERS took into account both short-term and long-term market return expectations as well as the expected pension fund cash flows. Using historical returns of all the funds' asset classes, expected compound (geometric) returns were calculated over the short-term (first 10 years) and the long-term (11+ years) using a building-block approach. Using the expected nominal returns for both short-term and long-term, the present value of benefits was calculated for each fund. The expected rate of return was set by calculating the rounded single equivalent expected return that arrived at the same present value of benefits for cash flows as the one calculated using both short-term and long-term returns. The expected rate of return was then set equal to the single equivalent rate calculated above and adjusted to account for assumed administrative expenses.

Note 7: Pension Plan (Continued)

B. Net Pension Liability (Continued)

The expected real rates of return by asset class are as follows:

Asset Class[1]	Current Target Allocation	Real Return Years 1 - 10[2]	Real Return Years 11+ [3]
Global equity	50%	4.80%	5.98%
Fixed income	28%	1.00%	2.62%
Inflation assets	-	0.77%	1.81%
Private equity	8%	6.30%	7.23%
Real assets	13%	3.75%	4.93%
Liquidity	1%	-	-0.92%
Total	100%		

[1] In the System's ACFR, fixed income is included in global debt securities; liquidity is inclued in short-term investments; inflation assets are inclued in both global equity securities and global debt securities.

[2] An expected inflation of 2.0% used for this period

[3] An expected inflation of 2.92% used for this period

Change of Assumptions

The Plan adopted a new amortization policy effective with the 2019 actuarial valuation. The new amortization policy shortens the period over which actuarial gains and losses are amortized from 30 years to 20 years with the payments computed as a level dollar amount. In addition, the new policy does not utilize a five-year ramp-up and ramp-down on UAL bases attributable to assumption changes and non-investment gains/losses. The new policy also does not utilize a five-year ramp-down on investment gains/losses. These changes apply only to new UAL bases established on or after June 30, 2019.

Discount Rate

The discount rate used to measure the total pension liability for PERF C was 7.15%. The projection of cash flows used to determine the discount rate assumed that contributions from plan members will be made at the current member contribution rates and that contributions from employers will be made at statutorily required rates, actuarially determined. Based on those assumptions, the Plan's fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Note 7: Pension Plan (Continued)

B. Net Pension Liability (Continued)

Pension Plan Fiduciary Net Position

Information about the pension plan's assets, deferred outflows of resources, liabilities, deferred inflows of resources, and fiduciary net position are presented in CalPERS's audited financial statements, which are publicly available reports that can be obtained at CalPERS's website at www.calpers.ca.gov. The plan's fiduciary net position and additions to/deductions from the plan's fiduciary net position have been determined on the same basis used by the pension plan, which is the economic resources measurement focus and the accrual basis of accounting. Benefits and refunds are recognized when due and payable in accordance with the terms of the plan. Investments are reported at fair value.

C. Proportionate Share of Net Pension Liability

The following table shows the Plan's proportionate share of the net pension liability over the measurement period.

	Plan Total Pension Liability	Plan Fiduciary Net Position	Plan Net Pension Liability
Balance at 6/30/2019 (VD)	$ 6,682,924	$ 5,811,356	$ 871,568
Balance at 6/30/2020 (MD)	7,475,465	6,439,634	1,035,831
Net changes during 2019 - 2020	$ 792,541	$ 628,278	$ 164,263

Valuation Date (VD), Measurement Date (MD)

The City's proportion of the net pension liability was determined by CalPERS using the output from the Actuarial Valuation System and the fiduciary net position, as provided in the CalPERS Public Agency Cost-Sharing Allocation Methodology Report, which is a publicly available report that can be obtained at CalPERS' website, at www.calpers.ca.gov. The City's proportionate share of the net pension liability for the miscellaneous Plan as of the June 30, 2019 and 2020 measurement dates was as follows:

Proportionate Share - June 30, 2019	0.021765%
Proportionate Share - June 30, 2020	0.024557%
Change - Increase (Decrease)	0.002792%

Sensitivity of the Proportionate Share of the Net Pension Liability to Changes in the Discount Rate

The following presents the City's proportionate share of the net pension liability of the Plan as of the measurement date, calculated using the discount rate of 7.15 percent, as well as what the net pension liability would be if it were calculated using a discount rate that is 1 percentage-point lower (6.15 percent) or 1 percentage-point higher (8.15 percent) than the current rate:

Note 7: Pension Plan (Continued)

C. Proportionate Share of Net Pension Liability (Continued)

	Discount Rate - 1% (6.15%)	Current Discount Rate (7.15%)	Discount Rate + 1% (8.15%)
Plan's Net Pension Liability	$ 2,030,633	$ 1,035,831	$ 213,857

Subsequent Events

There were no subsequent events that would materially affect the results presented in this disclosure.

Amortization of Deferred Outflows and Deferred Inflows of Resources

Under GASB 68, gains and losses related to changes in total pension liability and fiduciary net position are recognized in pension expense systematically over time.

The first amortized amounts are recognized in pension expense for the year the gain or loss occurs. The remaining amounts are categorized as deferred outflows and deferred inflows of resources related to pensions and are to be recognized in future pension expense.

The amortization period differs depending on the source of the gain or loss:

Difference between projected and actual earnings	5 year straight-line amortization
All other amounts	Straight-line amortization over the expected average remaining service lives of all members that are provided with benefits (active, inactive and retired) as of the beginning of the measurement period

The expected average remaining service lifetime (EARSL) is calculated by dividing the total future service years by the total number of plan participants (active, inactive, and retired) in the Public Agency Cost-Sharing Multiple-Employer Plan (PERF C).

The EARSL for PERF C for the measurement period ending June 30, 2020 is 3.8 years, which was obtained by dividing the total service years of 548,581 (the sum of remaining service lifetimes of the active employees) by 145,663 (the total number of participants: active, inactive, and retired) in PERF C. Inactive employees and retirees have remaining service lifetimes equal to 0. Total future service is based on the members' probability of decrementing due to an event other than receiving a cash refund.

Note 7: Pension Plan (Continued)

D. Pension Expense and Deferred Outflows and Deferred Inflows of Resources Related to Pensions

As of the start of the measurement period (July 1, 2019), the City's net pension liability was $871,568. For the measurement period ending June 30, 2020 (the measurement date), the City incurred a pension expense of $465,962.

As of June 30, 2021, the City has deferred outflows and deferred inflows of resources related to pensions as follows:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Changes of assumptions	$ -	$ 7,388
Differences between expected and actual experience	53,379	-
Differences between projected and actual investments earnings	30,771	-
Differences between employer's contributions and proprotionate share	110,685	9,554
Change in employer's proportion	83,347	44,501
Pension contributions made subsequent to measurement date	319,112	-
Total	$ 597,294	$ 61,443

The amounts above are net of outflows and inflows recognized in the 2019-20 measurement period expense. Contributions subsequent to the measurement date of $319,112 reported with deferred outflows of resources will be recognized as a reduction of the net pension liability in the upcoming fiscal year. Other amounts reported as deferred outflows and deferred inflows of resources related to pensions will be recognized in future pension expense as follows:

Fiscal Year Ending June 30:	Deferred Outflows/(Inflows) of Resources
2022	$ 87,508
2023	73,448
2024	41,026
2025	14,757
2026	-
Remaining	-

E. Payable to the Pension Plan

At June 30, 2021, the City reported a payable of $11,851 for the outstanding amount of contributions to the pension plan required for the year ended June 30, 2021.

Note 8: Other Post-Employment Benefits (OPEB)

Plan Description

The City has established a Retiree Healthcare Plan (HC Plan), and participates in a single-employer defined benefit retiree healthcare plan. Medical coverage is currently provided through CalPERS as permitted under the Public Employees' Medical and Hospital Care Act (PEMHCA). This coverage requires the employee to satisfy the requirements for retirement under CalPERS: either (a) attainment of age 50 (age 52, if a miscellaneous employee new to PERS on or after January 1, 2013) with 5 years of State or public agency service or (b) an approved disability retirement.

The employee must begin his or her retirement benefit within 120 days of terminating employment with the City to be eligible to continue medical coverage through the agency and be entitled to the benefits described below. If an eligible employee is not already enrolled in the medical plan, he or she may enroll within 60 days of retirement, during any future open enrollment period or with a qualifying life event. In other words, it is the timing of initiating retirement benefits and not timing of enrollment in the medical program which determines whether or not a City retiree qualifies for lifetime medical coverage and any benefits defined in the PEMHCA resolution. Once eligible, coverage may be continued at the retiree's option for his or her lifetime. A surviving spouse and other eligible dependents may also continue coverage.

PEMHCA Benefits provided: As a PEMHCA employer, the City is obligated to contribute toward the cost of retiree medical coverage for the retiree's lifetime or until coverage is discontinued. The City maintains a resolution with CalPERS defining the level of the City's contribution toward the cost of medical plan premiums for employees and retirees to be the PEMHCA minimum employer contribution (MEC). The MEC is $139 per month in 2020 and $143 per month in 2021. A separate financial report is not prepared for the HC Plan.

Employees Covered

As of the June 30, 2019 actuarial valuation, the following current and former employees were covered by the benefit terms under the HC Plan:

Active employees	24
Inactive employees or beneficiaries currently receiving benefits	2
Total	**26**

Contributions

City contributions to the Plan occur as benefits are paid to or on behalf of retirees. Benefit payments may occur in the form of direct payments for premiums and taxes ("explicit subsidies") and/or indirect payments to retirees in the form of higher premiums for active employees ("implicit subsidies"). The City makes contributions to eligible retirees for their medical plan premiums when the retiree enrolls in a City sponsored health plan. The current monthly amount paid by the City is $143 per month per retiree. For the fiscal year ended June 30, 2021, the City's cash contributions were $6,768 in payments for premiums and $829 in implicit contributions.

Note 8: Other Post-Employment Benefits (OPEB) (continued)

Net OPEB Liability

The City's net OPEB liability was measured as of June 30, 2020 and the total OPEB liability used to calculate the net OPEB liability was determined by an actuarial valuation dated June 30, 2020, based on the following actuarial methods and assumptions:

Actuarial Assumptions:	
Discount Rate	2.66%
Inflation	2.50%
Salary Increases	3.00%
Mortality Rate	CalPERS 2017 Experience Study
Healthcare Trend Rate	Getzen Model 2019_b published by the Society of Actuaries

Discount Rate

The discount rate used to measure the total OPEB liability was 2.66% percent. The City is currently financing its OPEB liability on a pay-as-you-go basis. With the City's approval, the discount rate used in the valuation is based on the S&P Municipal Bond 20 Year High Grade Index. As of the beginning and end of the Measurement Period, use of this index results in discount rates of 2.79% on June 30, 2019 and 2.66% on June 30, 2020.

Changes of Assumptions

The discount rate was decreased from 2.79% to 2.66%.

Changes in the Total OPEB Liability

The changes in the total OPEB liability for the HC Plan are as follows:

	Total OPEB Liability (a)
Balance at June 30, 2020 (Measurement Date June 30, 2019)	$ 363,669
Changes recognized for the measurement period:	
Service Cost	57,648
Interest on the Total OPEB liability	11,677
Changes of assumptions	9,295
Plan experience differences	-
Benefit payments	(5,572)
Net Changes	73,048
Balance at June 30, 2021 (Measurement Date June 30, 2020)	$ 436,717

Note 8: Other Post-Employment Benefits (OPEB) (continued)

Sensitivity of the Total OPEB Liability to Changes in the Discount Rate

The following presents the total OPEB liability of the City if it were calculated using a discount rate that is one percentage point lower or one percentage point higher than the current rate, for measurement period ended June 30, 2020:

	1% Decrease 1.66%	Current Discount Rate 2.66%	1% Increase 3.66%
Total OPEB Liability	$ 518,321	$ 436,717	$ 371,747

Sensitivity of the Total OPEB Liability to Changes in the Health Care Cost Trend Rates

The following presents the total OPEB liability of the Authority if it were calculated using health care cost trend rates that are one percentage point lower or one percentage point higher than the current rate, for measurement period ended June 30, 2020:

	1% Decrease	Current Healthcare Cost Trend Rates	1% Increase
Total OPEB Liability	$ 355,615	$ 436,717	$ 543,553

Recognition of Deferred Outflows and Deferred Inflows of Resources

Gains and losses related to changes in total OPEB liability and fiduciary net position are recognized in OPEB expense systematically over time.

Amounts are first recognized in OPEB expense for the year the gain or loss occurs. The remaining amounts are categorized as deferred outflows and deferred inflows of resources related to OPEB and are to be recognized in future OPEB expense.

The recognition period differs depending on the source of the gain or loss:

Assumption changes and experience gains/losses	Expected average remaining service lifetime (EARSL) (11.94 Years at June 30, 2019)

OPEB Expense and Deferred Outflows/Inflows of Resources Related to OPEB

For the fiscal year ended June 30, 2021, the City recognized OPEB expense of $20,884. As of fiscal year ended June 30, 2021, the City reported deferred outflows of resources related to OPEB from the following sources:

Note 8: Other Post-Employment Benefits (OPEB) (continued)

OPEB Expense and Deferred Outflows/Inflows of Resources Related to OPEB (continued)

	Deferred Outflows of Resources	Deferred Inflows of Resources
OPEB contributions subsequent to measurement date	$ 7,597	$ -
Changes of assumptions	25,980	221,827
Differences between expected and actual experience	-	256,614
Total	$ 33,577	$ 478,441

The $7,597 reported as deferred outflows of resources related to contributions subsequent to the June 30, 2020 measurement date will be recognized as a reduction of the net OPEB liability in the upcoming fiscal year. Other amounts reported as deferred outflows of resources related to OPEB will be recognized as expense as follows:

Fiscal Year Ended June 30:	Deferred Outflows/(Inflows) of Resources
2022	$ (48,441)
2023	(48,441)
2024	(48,441)
2025	(48,441)
2026	(48,441)
Thereafter:	(210,256)

Note 9: Risk Management

A. Description of Self-Insurance Pool Pursuant to Joint Powers Agreement

The City of Aliso Viejo is a member of the CALIFORNIA JOINT POWERS INSURANCE AUTHORITY (Authority). The Authority is composed of 118 California public entities and is organized under a joint powers agreement pursuant to California Government Code §6500 et seq. The purpose of the Authority is to arrange and administer programs for the pooling of self-insured losses, to purchase excess insurance or reinsurance, and to arrange for group purchased insurance for property and other lines of coverage. The California JPIA began covering claims of its members in 1978. Each member government has an elected official as its representative on the Board of Directors. The Board operates through a nine-member Executive Committee.

Note 9: Risk Management (continued)

B. Primary Self-Insurance Programs of the Authority

Each member pays an annual contribution at the beginning of the coverage period. A retrospective adjustment is then conducted annually thereafter, for coverage years 2012-13 and prior. Coverage years 2013-14 and forward are not subject to routine annual retrospective adjustment. The total funding requirement for primary self-insurance programs is based on an actuarial analysis. Costs are allocated to individual agencies based on payroll and claims history, relative to other members of the risk-sharing pool.

Primary Liability Program

Claims are pooled separately between police and general government exposures. (1) The payroll of each member is evaluated relative to the payroll of other members. A variable credibility factor is determined for each member, which establishes the weight applied to payroll and the weight applied to losses within the formula. (2) The first layer of losses includes incurred costs up to $30,000 for each occurrence and is evaluated as a percentage of the pool's total incurred costs within the first layer. (3) The second layer of losses includes incurred costs from $30,000 to $750,000 for each occurrence and is evaluated as a percentage of the pool's total incurred costs within the second layer. (4) Incurred costs from $750,000 to $50 million, are distributed based on the outcome of cost allocation within the first and second loss layers.

The overall coverage limit for each member, including all layers of coverage, is $50 million per occurrence. Subsidence losses have a sub-limit of $40 million per occurrence. The coverage structure includes retained risk that is pooled among members, reinsurance, and excess insurance. More detailed information about the various layers of coverage is available on the following website: https://cjpia.org/protection/coverage-programs.

Primary Workers' Compensation Program

Claims are pooled separately between public safety (police and fire) and general government exposures. (1) The payroll of each member is evaluated relative to the payroll of other members. A variable credibility factor is determined for each member, which establishes the weight applied to payroll and the weight applied to losses within the formula. (2) The first layer of losses includes incurred costs up to $50,000 for each occurrence and is evaluated as a percentage of the pool's total incurred costs within the first layer. (3) The second layer of losses includes incurred costs from $50,000 to $100,000 for each occurrence and is evaluated as a percentage of the pool's total incurred costs within the second layer. (4) Incurred costs from $100,000 to statutory limits are distributed based on the outcome of cost allocation within the first and second loss layers.

For 2020-21 the Authority's pooled retention is $1 million per occurrence, with reinsurance to statutory limits under California Workers' Compensation Law. Employer's Liability losses are pooled among members to $1 million. Coverage from $1 million to $5 million is purchased as part of a reinsurance policy, and Employer's Liability losses from $5 million to $10 million are pooled among members.

Note 9: Risk Management (continued)

C. Purchased Insurance

Pollution Legal Liability Insurance

The City of Aliso Viejo participates in the pollution legal liability insurance program which is available through the Authority. The policy covers sudden and gradual pollution of scheduled property, streets, and storm drains owned by the City of Aliso Viejo. Coverage is on a claims-made basis. There is a $50,000 deductible. The Authority has an aggregate limit of $50 million for the 3-year period from July 1, 2018 through July 1, 2021. Each member of the Authority has a $10 million sub-limit during the 3-year policy term.

Property Insurance

The City of Aliso Viejo participates in the all-risk property protection program of the Authority. This insurance protection is underwritten by several insurance companies. City of Aliso Viejo property is currently insured according to a schedule of covered property submitted by the City of Aliso Viejo to the Authority. City of Aliso Viejo property currently has all-risk property insurance protection in the amount of $28,497,001. There is a $10,000 deductible per occurrence except for non-emergency vehicle insurance which has a $2,500 deductible.

Earthquake and Flood Insurance

The City of Aliso Viejo purchases earthquake and flood insurance on a portion of its property. The earthquake insurance is part of the property protection insurance program of the Authority. City of Aliso Viejo property currently has earthquake protection in the amount of “Non Participant”. There is a deductible of 5% per unit of value with a minimum deductible of $100,000.

Crime Insurance

The City of Aliso Viejo purchases crime insurance coverage in the amount of $1,000,000 with a $2,500 deductible. The fidelity coverage is provided through the Authority.

Special Event Tenant User Liability Insurance

The City of Aliso Viejo further protects against liability damages by requiring tenant users of certain property to purchase low-cost tenant user liability insurance for certain activities on agency property. The insurance premium is paid by the tenant user and is paid to the City of Aliso Viejo according to a schedule. The City of Aliso Viejo then pays for the insurance. The insurance is facilitated by the Authority.

D. Adequacy of Protection

During the past three fiscal years, none of the above programs of protection experienced settlements or judgments that exceeded pooled or insured coverage. There were also no significant reductions in pooled or insured liability coverage in 2020-21.

Note 10: Joint Venture

Orange County Fire Authority

In July 2001, the City entered into a joint powers agreement with the cities of Buena Park, Cypress, Dana Point, Irvine, Laguna Hills, Laguna Niguel, Lake Forest, La Palma, Los Alamitos, Mission Viejo, Placentia, San Clemente, San Juan Capistrano, Seal Beach, Stanton, Tustin, Villa Park, Westminster, and Yorba Linda and the County of Orange to create the Orange County Fire Authority ("the Authority"). Since the creation of the Authority, the Cities of Laguna Woods, Rancho Santa Margarita, and Santa Ana joined the Authority as members eligible for fire protection services. The purpose of the Authority is to provide for mutual fire protection, prevention and suppression services, and related and incidental services including, but not limited to, emergency medical and transport services as well as providing facilities and personnel for such services. The effective date of formation was March 1, 1995. The Authority's governing board consists of one representative from each City and two from the County. The operations of the Authority are funded with fire fees collected by the County through the property tax roll for the unincorporated area and on behalf of all member cities except for the Cities of Stanton, Tustin, San Clemente, Buena Park, Placentia, Seal Beach, and Santa Ana. The County pays all structural fire fees it collects to the Authority. The Cities of Stanton, Tustin, San Clemente, Buena Park, Placentia, Seal Beach, and Santa Ana are considered "cash contract cities" and accordingly, make cash contributions based on the Authority's annual budget. The City of Aliso Viejo does not have an equity interest in the assets of the Orange County Fire Authority. Complete financial statements may be obtained from the Orange County Fire Authority, 1 Fire Authority Rd., Irvine, California, 92602.

Note 11: Contingent Liabilities

Various claims and suits have been filed against the City in the normal course of business. Although the outcome of these matters is not presently determinable in the opinion of legal counsel, the resolutions of these matters will not have a material adverse effect on the financial condition of the City.

On March 11, 2020, the World Health Organization declared the novel strain of coronavirus (COVID-19) a global pandemic and recommended containment and mitigation measures worldwide. The COVID-19 outbreak in the United States caused business disruption through mandated and voluntary closings of businesses and shelter in place orders. The City's major revenue sources could still be directly impacted by these events; it is possible that this matter could negatively impact the City. However, the ultimate financial impact and duration cannot be estimated at this time, and no adjustments have been made to these financial statements as a result of this contingency.

Note 12: Tax Abatements

The City entered into sales tax abatement agreements with local businesses under the Economic Development Subsidy under Government Code Section 53083. For the fiscal year ended June 30, 2021, the City abated sales taxes totaling $253,432.

Note 13: Reconciliation of Net Position

The net investment in capital assets as presented in the Statement of Net Position is calculated as follows:

Capital assets, net	$ 113,977,966
Less bonds payable	(12,020,000)
Less premium on bonds payable	(935,795)
Less retentions payable	(147,949)
Plus unspent bond proceeds	135,607
Net investment in capital assets	$ 101,009,829

Note 14: Subsequent Event

On March 11, 2021, HR 1319, the American Rescue Plan Act of 2021 (ARPA), was signed into law. ARPA was designed to provide assistance to individuals, businesses and, state and local governments to assist in the economic recovery from the ongoing COVID-19 pandemic. The City of Aliso Viejo was granted an allocation of $5,678,106, delivered in two tranches of $2,839,053 in June 2021 and June 2022. The qualified use of these funds includes public safety, infrastructure, and restoration of services to pre-pandemic levels.

Note 15: Prior Period Adjustment

As a result of GASB 84 implementation, as discussed in Note 1, beginning fiduciary net position has been restated as follows:

	Community Trust	CFD 2005-1	Renewable Farms	Total
Beginning fiduciary net position, originally reported	$ -	$ -	$ -	$ -
Prior period adjustment	-	4,668,886	-	4,668,886
Beginning fiduciary net position, as restated	$ -	$ 4,668,886	$ -	$ 4,668,886

Budgetary Comparison Information

Budget Policies

The City Manager shall prepare and submit the proposed annual budget to the City Council for its approval for all governmental funds. The agenda for the budget workshops and budget meetings are noticed in accordance with the Brown Act. After reviewing the same and making such revisions as it may deem advisable and public input the budget is then adopted annually by the Council at a regularly held meeting. The budget is adopted prior to the beginning of the fiscal year and serves as the foundation for the City's financial plan.

The level of budgetary control (the level at which expenditures cannot legally exceed the appropriated amount) is established at the fund level. Transfers of appropriations between funds can be made with the City Manager/Financial Services Director approval. City Council's approval is required for all budget amendments that result in a change to the adopted budget.

Budgets are prepared in accordance with generally accepted accounting principles using the modified accrual basis of accounting.

Appropriations lapse at the end of the fiscal year unless they are re-appropriated through the formal budget process. Encumbrances do not constitute expenditures or liabilities of the City.

Budgeted amounts are as originally adopted, or as amended in accordance with prescribed procedures throughout the fiscal year.

Excess of expenditures over appropriations are as follows:

Expenditures that exceeded appropriations for the year ended June 30, 2021 are as follows:

Fund	Expenditures	Appropriations	Excess
General Fund:			
City manager	$ 629,525	$ 626,945	$ (2,580)
Transfers out	5,258,591	5,219,535	(39,056)
Aliso Viejo Center:			
Community services	1,074,567	919,395	(155,172)
COP 2006:			
Capital outlay	10,240,431	-	(10,240,431)
Non-Major Funds:			
Public Safety Grants	172,532	171,245	(1,287)
Development Impact	154,649	-	(154,649)
Aquatic Center	1,067,135	930,280	(136,855)

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
GENERAL FUND
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	$ 32,970,759	$ 32,970,759	$ 32,970,759	$ -
Resources (Inflows):				
Taxes	16,150,275	14,548,775	14,823,926	275,151
Licenses and permits	523,205	769,455	976,781	207,326
Intergovernmental	38,000	38,000	42,844	4,844
Charges for services	327,725	395,675	488,154	92,479
Use of money and property	990,420	813,550	940,875	127,325
Fines and forfeitures	320,000	295,000	310,419	15,419
Other	52,600	80,700	79,582	(1,118)
Transfers in	177,770	787,300	748,282	(39,018)
Amounts available for appropriations	**51,550,754**	**50,699,214**	**51,381,622**	**682,408**
Charges to Appropriations (Outflows):				
General government:				
City council	188,325	184,835	170,930	13,905
City manager	643,880	626,945	629,525	(2,580)
Human resources	218,835	215,595	212,296	3,299
Economic development	476,460	1,203,350	1,087,509	115,841
City clerk	451,880	455,530	445,305	10,225
City attorney	487,100	487,100	367,891	119,209
Finance	874,265	862,385	779,554	82,831
Information technology	811,575	812,445	731,197	81,248
General government	657,200	683,920	581,423	102,497
Community development:				
Community services	2,044,730	1,867,530	1,525,026	342,504
Planning	1,114,255	1,187,525	873,575	313,950
Building	571,765	742,715	686,606	56,109
Public works	1,924,100	1,903,560	1,797,903	105,657
Public safety	9,737,490	9,627,315	9,103,128	524,187
Capital outlay	-	-	-	-
Transfers out	158,310	5,219,535	5,258,591	(39,056)
Total charges to Appropriations	**20,360,170**	**26,080,285**	**24,250,459**	**1,829,826**
Fund Balances - Ending	**$ 31,190,584**	**$ 24,618,929**	**$ 27,131,163**	**$ 2,512,234**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
GAS TAX
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 787,587**	**$ 787,587**	**$ 787,587**	**$ -**
Resources (Inflows):				
Intergovernmental	1,296,360	1,296,360	1,101,268	(195,092)
Use of money and property	15,000	15,000	19,067	4,067
Amounts Available for Appropriations	**2,098,947**	**2,098,947**	**1,907,922**	**(191,025)**
Charges to Appropriations (Outflows):				
Public works	1,163,200	1,183,200	1,167,273	15,927
Total Charges to Appropriations	**1,163,200**	**1,183,200**	**1,167,273**	**15,927**
Fund Balances - Ending	**$ 935,747**	**$ 915,747**	**$ 740,649**	**$ (175,098)**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
ALISO VIEJO CENTER
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	$ -	$ -	$ -	$ -
Resources (Inflows):				
Charges for services	1,565,415	827,405	720,554	(106,851)
Other	277,585	91,990	174,254	82,264
Transfers in	-	-	179,759	179,759
Amounts Available for Appropriations	**1,843,000**	**919,395**	**1,074,567**	**155,172**
Charges to Appropriations (Outflows):				
Community services	1,684,130	919,395	1,074,567	(155,172)
Transfers out	158,870	-	-	-
Total Charges to Appropriations	**1,843,000**	**919,395**	**1,074,567**	**(155,172)**
Fund Balances - Ending	$ -	$ -	$ -	$ -

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
FEDERAL GRANTS
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 13,127**	**$ 13,127**	**$ 13,127**	**$ -**
Resources (Inflows):				
Intergovernmental	484,805	1,388,460	755,695	(632,765)
Use of money and property	500	500	54,585	54,085
Amounts Available for Appropriations	**498,432**	**1,402,087**	**823,407**	**(578,680)**
Charges to Appropriations (Outflows):				
General government	28,500	443,255	71,160	372,095
Transfer out	327,305	740,925	736,838	4,087
Total Charges to Appropriations	**355,805**	**1,184,180**	**807,998**	**376,182**
Fund Balances - Ending	**$ 142,627**	**$ 217,907**	**$ 15,409**	**$ (202,498)**

CAPITAL ASSETS – MODIFIED APPROACH FOR INFRASTRUCTURE

The City elected to use the modified approach in reporting their street pavement infrastructure network.

Under the modified approach, infrastructure assets that are part of a network or subsystem of a network are not required to be depreciated as long as two requirements are met. First, the government manages the eligible infrastructure assets using an asset management system that has the following characteristics:

- Has an up-to-date inventory of eligible infrastructure assets.
- Performs condition assessments of the eligible infrastructure assets and summarize the results using a measurement scale.
- Estimates each year the annual amount to maintain and preserve the eligible infrastructure assets at the condition level established and disclosed by the government.

Second, the government documents that the eligible infrastructure assets are being preserved approximately at (or above) a condition level established and disclosed by the government. If eligible infrastructure assets meet all requirements and are not depreciated, all expenditures made for those assets (except for additions and improvements) are expensed in the period incurred. Additions and improvements to eligible infrastructure assets are capitalized. Additions or improvements increase the capacity or efficiency of infrastructure assets rather than preserve the useful life of the assets.

The condition of road pavement is measured using the Abbott Pavement Management System. All city streets have asphalt surfaces. Six distress factors are assessed for all street segments. Pavement condition is rated on a scale of 0 to 100 points. This rating scale is called a deficiency rating. The scale is subdivided into ranges or categories. Pavement condition is commonly defined by the following five categories:

1. Very good (86 to 100 Rating) — A street rated as excellent has the characteristics of a new street. A street in this category has no surface defects that would affect ride quality or cause excess tire noise.

2. Good (75 to 85 Rating) — A street rated as good has some surface defects that can be seen when walking along the street. Some cracking and raveling will probably exist. In fact, there could be large cracks in the street or many hairline cracks. There may be some minor bumps that can be felt when driving the street at posted speeds.

3. Fair (60 to 74 Rating) — A street rated as fair has areas of surface defects that are apparent to drivers and passengers as they use the street. There will probably be significant cracking and raveling of the asphalt surface. If cracking does not exist, the street will probably have many patches and utility cuts or perhaps some rutting and deformation. There will be some ride roughness and some additional tire noise. These streets will not cause increases in vehicle driving costs due to extra wear and tear on vehicles.

CAPITAL ASSETS – MODIFIED APPROACH FOR INFRASTRUCTURE (CONTINUED)

4. Poor (41 to 59 Rating) — A street rated as poor has surface defects generally throughout its length that are readily apparent to anyone using the street. There will be areas showing structural failure with closely spaced cracking and there may be pieces of loose pavement. A street in this category will cause additional vehicle user costs and excessive tire noise.

5. Very poor (40 and below Rating) — A street rated critical will have major areas of structural failure which may alter the speeds at which typical drivers drive on the street. There will be missing pieces of pavement. Repair of a street in this category will require reconstruction.

Annual street maintenance costs for the previous five fiscal years were as follows:

Year Ended June 30,	Actual	Estimated
2017	$ 2,214,452	$ 2,675,535
2018	1,730,400	2,100,080
2019	3,131,301	3,621,540
2020	3,135,658	4,308,590
2021	3,425,241	3,779,360
Total	$ 13,637,052	$ 16,485,105

The City of Aliso Viejo City Council (the Council) accepted the findings of the Pavement Management System performed in fiscal year 2002 (see results below) and adopted a condition rating of 80 as the minimum acceptable Pavement Condition Index (PCI). The PMS was updated using statistical methods in 2004. The approach incorporated a new field survey of approximately 10% of all streets. The survey was then statistically extended to the entire street system. A complete field survey was performed and accepted by the City Council starting fiscal year 2008 and every two years thereafter. See below for the three most recent condition assessments:

Conditions		2016	Mileage	2018	Mileage	2020	Mileage
86-100	Very good	41.8%	30.4	58.1%	41.9	40.8%	30.5
75-85	Good	36.4%	26.5	25.4%	18.3	36.3%	25.5
60-74	Fair	20.6%	15.0	14.6%	10.5	20.1%	14.1
41-59	Poor	1.2%	0.9	1.9%	1.4	2.1%	1.5
0-40	Very poor	0.0%	-	0.0%	-	0.7%	0.5
		100.0%	72.8	100.0%	72.1	100.0%	72.1

The results of the most recent complete condition assessment (performed in fiscal year 2020) reported an average condition rating of 82 which is 2.7 points lower than the 2018 average of 84.7. Funding in the amount of $3,193,022 was utilized for the maintenance/rehabilitation to achieve the minimum PCI standard as of June 30, 2020. The estimated funding required to maintain the PCI standard was calculated at $4,312,065. The condition survey will be updated during the fiscal year ended June 30, 2022, for a two-year cycle.

CITY OF ALISO VIEJO

REQUIRED SUPPLEMENTARY INFORMATION
MISCELLANEOUS PLAN
SCHEDULE OF PROPORTIONATE SHARE OF THE NET PENSION LIABILITY AND RELATED RATIOS AS OF THE MEASUREMENT DATE
AS OF JUNE 30, FOR THE LAST TEN FISCAL YEARS*

Measurement Date	Employer's Proportion of the Collective Net Pension Liability[1]	Employer's Proportionate Share of the Collective Net Pension Liability	Employer's Covered Payroll	Employer's Proportionate Share of the Collective Net Pension Liability as a Percentage of the Employer's Covered Payroll	Pension Plan's Fiduciary Net Position as a Percentage of the Total Pension Liability
6/30/2014	0.009530%	$ 593,141	$ 1,385,329	42.82%	83.03%
6/30/2015	0.008707%	597,632	1,512,663	39.51%	84.98%
6/30/2016	0.008898%	845,320	1,553,759	54.40%	81.19%
6/30/2017	0.010501%	1,041,374	1,863,005	55.90%	80.23%
6/30/2018	0.009633%	928,264	2,081,191	44.60%	84.47%
6/30/2019	0.008506%	871,568	2,339,338	37.26%	86.96%
6/30/2020	0.009520%	1,035,831	2,602,634	39.80%	86.14%

[1] Proportion of the collective net pension liability represents the plan's proportion of PERF C, which includes both the Miscellaneous and Safety Risk Pools excluding the 1959 Survivors Risk Pool.

*Historical information is required only for measurement period for which GASB 68 and 71 were applicable. Future years' information will be displayed up to 10 years as information becomes available.

CITY OF ALISO VIEJO

REQUIRED SUPPLEMENTARY INFORMATION (CONTINUED)
MISCELLANEOUS PLAN
SCHEDULE OF PLAN CONTRIBUTIONS
AS OF JUNE 30, FOR THE LAST TEN FISCAL YEARS *

Fiscal Year	Contractually Determined Contributions	Contributions in Relation to the Contractually Determined Contributions	Contribution Deficiency (Excess)	Employer's Covered Payroll	Contributions as a Percentage of Covered Payroll
2014-15	$ 164,464	$ (164,464)	$ -	$ 1,512,663	10.87%
2015-16	146,386	(146,386)	-	1,553,759	9.42%
2016-17	179,320	(179,320)	-	1,863,005	9.63%
2017-18	270,996	(270,996)	-	2,081,191	13.02%
2018-19	239,511	(439,511)	(200,000)	2,339,338	10.24%
2019-20	274,755	(274,755)	-	2,602,634	10.56%
2020-21	319,112	(319,112)	-	2,732,043	11.68%

Notes to Schedule:

Change in Benefit Terms: None

Changes in Assumptions: For 2020, the Plan adopted a new amortization policy effective with the 2019 actuarial valuation. The new amortization policy shortens the period over which actuarial gains and losses are amortized from 30 years to 20 years with the payments computed as a level dollar amount. In addition, the new policy does not utilize a five-year ramp-up and ramp-down on UAL bases attributable to assumption changes and non-investment gains/losses. The new policy also does not utilize a five-year ramp-down on investment gains/losses. These changes apply only to new UAL bases established on or after June 30, 2019. There were no changes in assumptions in 2019. In 2018, demographic assumptions and inflation rate were changed in accordance to the CalPERS Experience Study and Review of Actuarial Assumptions December 2017. There were no changes in the discount rate in 2019. In 2017, the accounting discount rate was reduced from 7.65 percent to 7.15 percent. In 2016, there were no changes in the discount rate. In 2015, amounts reported reflect an adjustment of the discount rate from 7.5 percent (net of administrative expense) to 7.65 percent (without a reduction for pension plan administrative expense). In 2014, amounts reported were based on the 7.5 percent discount rate.

*Historical information is required only for measurement period for which GASB 68 and 71 were applicable. Future years' information will be displayed up to 10 years as information becomes available.

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REQUIRED SUPPLEMENTARY INFORMATION (CONTINUED)
SCHEDULE OF CHANGES IN THE TOTAL OPEB LIABILITY AND RELATED RATIOS
AS OF JUNE 30, FOR THE LAST TEN YEARS*

Measurement Period	2017	2018	2019	2020
Total OPEB Liability				
Service Cost	$ 100,385	$ 90,249	$ 97,449	$ 57,648
Interest on the Total OPEB Liability	17,635	23,007	25,402	11,677
Actual and expected experience difference	-	-	(308,246)	-
Changes in assumptions	(73,112)	26,106	(217,431)	9,295
Changes in benefit terms	-	-	-	-
Benefit payments	(4,554)	(11,378)	(11,963)	(5,572)
Net change in Total OPEB Liability	40,354	127,984	(414,789)	73,048
Total OPEB Liability - Beginning	610,120	650,474	778,458	363,669
Total OPEB Liability - Ending (a)	650,474	778,458	363,669	436,717
Plan Fiduciary Net Position				
Contribution - employer	4,554	11,378	11,963	5,572
Net investment income	-	-	-	-
Benefit payments	(4,554)	(11,378)	(11,963)	(5,572)
Administrative expense	-	-	-	-
Net change in Plan Fiduciary Net Position	-	-	-	-
Plan Fiduciary Net Position - Beginning	-	-	-	-
Plan Fiduciary Net Position - Ending (b)	-	-	-	-
Net OPEB Liability - Ending (a) - (b)	$ 650,474	$ 778,458	$ 363,669	$ 436,717
Plan fiduciary net position as a percentage of the total OPEB liability	0.00%	0.00%	0.00%	0.00%
Covered-employee payroll	$ 2,227,782	$ 2,451,516	$ 3,166,359	$ 3,357,784
Net OPEB liability as a percentage of covered-employee payroll	29.20%	31.75%	11.49%	13.01%

Notes to schedule:
The City does not have assets accumulated in a trust that meets the criteria of GASB 75 to pay related benefits.
Contributions are fixed and not based on a measure of pay, therefore covered-employee payroll is used in the schedule.

Valuation Date	6/30/2019
Actuarial cost method	Entry Age Normal Level % of Pay
Discount rate	2.66% as of June 30, 2020
Inflation	2.50%
Healthcare cost trend rates	6.50% in 2021 fluctuating untilr eaching ultimate rate of 4.0% in 2076
Salary increases	3.00%
Retirement age	50 to 75
Mortality	CalPERS 2017 Experience Study
Mortality improvement	MW Scale 2020

OTHER GOVERNMENTAL FUNDS

OTHER SPECIAL REVENUE FUNDS

Traffic Congestion Relief

The Traffic Congestion Relief Fund is used to account for revenue received from the SB1 Loan Repayment Program from the State of California.

Measure M

The Measure M Fund is used to account for the City's share of the sales tax increase authorized by Orange County's Measure "M". These monies are legally restricted for the acquisition, construction, and improvement of public streets.

SB1 – RMRA

Senate Bill (SB) 1 created the Road Rehabilitation Maintenance Account to address deferred maintenance on the State Highway System and the local street and road system. These funds are legally restricted for basic road maintenance, rehabilitation, and critical safety projects on the local streets and roads. This is a new fund in fiscal year 2019-2020 and was previously reported as part of the Gas Tax major fund.

Public Safety Grants

This fund is used to account for law enforcement grants received such as the California Law Enforcement Equipment Program (CLEEP) and the Supplemental Law Enforcement State Fund (SLESF).

Air Quality Improvement

This fund is used to account for the City's share of vehicle registration fees that the State of California has allocated to address air quality concerns in Southern California. These monies are to be used in air quality maintenance programs locally and/or regionally.

Integrated Waste Management

This fund is used to account for the receipt of the California Beverage and Recycling Grant.

Other Grants Fund

This fund is used to account for state, local, and other grants received such as Prop 10, CalRecycle, and the urban Runoff Grant.

Technology Grants

This fund is a result of negotiations between the City and a franchisee for a new franchise agreement. These funds will be used for new technology purchases, provide City information on the Cable T.V. Government Access Channel and provide programs and access to computers through technology upgrades to the Family Resource Center.

OTHER GOVERNMENTAL FUNDS (continued)

Development Impact Fund

This fund is used to account for revenue received as a result of negotiated developer agreements for affordable housing, traffic mitigation, community enhancement, and open spaces.

Aquatic Center

This fund is used to account for the operations of the Aliso Viejo Aquatic Center. The Aliso Viejo Aquatic Center is a City owned facility that provides residents with a resort-style swimming complex that includes a lap pool, whirlpool, tots wading pool, snack bar, and patio.

AV Ranch Foundation

This fund is used to account for donations received for the AV Ranch and payments approved by its Board of Trustees.

**Note: this fund had no legally adopted budget for FY 2020-2021.*

OTHER CAPITAL PROJECTS FUNDS

Capital Improvements

This fund is used to account for the City's street improvement projects.

Storm Water

This fund is used to account for the City's storm water related improvement projects.

DEBT SERVICE FUNDS

Debt Service Fund

This fund is used to account for the City's debt payments as well as any additional debt amounts deemed to be advisable and necessary for any public or municipal purposes.

CITY OF ALISO VIEJO

COMBINING BALANCE SHEET
OTHER GOVERNMENTAL FUNDS
JUNE 30, 2021

	Special Revenue Funds				
	Traffic Congestion Relief	Measure M	SB1 - RMRA	Public Safety Grants	Air Quality Improvement
Assets:					
Cash and investments	$ 90,909	$ 730,668	$ 614,279	$ 120,889	$ 950,068
Receivables:					
Accounts	-	-	-	-	-
Due from other governments	-	120,880	169,061	-	82,005
Total Assets	**$ 90,909**	**$ 851,548**	**$ 783,340**	**$ 120,889**	**$ 1,032,073**
Liabilities, Deferred Inflows of Resources, and Fund Balances:					
Liabilities:					
Accounts payable	$ -	$ -	$ -	$ 10,942	$ -
Accrued liabilities	-	-	-	-	-
Due to other funds	-	-	-	-	-
Total Liabilities	**-**	**-**	**-**	**10,942**	**-**
Deferred Inflows of Resources:					
Unavailable revenues	-	-	-	-	-
Fund Balances (Deficits):					
Restricted for:	-				
Community services	-	-	-	-	-
Community development projects	-	-	-	-	-
Capital projects	90,909	851,548	783,340	-	1,032,073
Public safety	-	-	-	109,947	-
Unassigned	-	-	-	-	-
Total Fund Balances	**90,909**	**851,548**	**783,340**	**109,947**	**1,032,073**
Total Liabilities, Deferred Inflows of Resources, and Fund Balances	**$ 90,909**	**$ 851,548**	**$ 783,340**	**$ 120,889**	**$ 1,032,073**

CITY OF ALISO VIEJO

COMBINING BALANCE SHEET
OTHER GOVERNMENTAL FUNDS
JUNE 30, 2021 (Continued)

	Special Revenue Funds				
	Integrated Waste Management	Other Grants	Technology Grants	Development Impact	Aquatic Center
Assets:					
Cash and investments	$ 17,752	$ -	$ 128,006	$ 1,410,622	$ 188,920
Receivables:					
Accounts	-	-	29,072	-	8,654
Due from other governments	-	97,451	-	-	-
Total Assets	**$ 17,752**	**$ 97,451**	**$ 157,078**	**$ 1,410,622**	**$ 197,574**
Liabilities, Deferred Inflows of Resources, and Fund Balances:					
Liabilities:					
Accounts payable	$ -	$ -	$ 6,303	$ -	$ 162,796
Accrued liabilities	-	-	-	-	15,278
Due to other funds	-	53,366	-	-	-
Total Liabilities	**-**	**53,366**	**6,303**	**-**	**178,074**
Deferred Inflows of Resources:					
Unavailable revenues	-	82,418	-	-	-
Fund Balances (Deficits):					
Restricted for:					
Community services	-	-	-	-	19,500
Community development projects	17,752	-	150,775	1,410,622	-
Capital projects	-	-	-	-	-
Public safety	-	-	-	-	-
Unassigned	-	(38,333)	-	-	-
Total Fund Balances	**17,752**	**(38,333)**	**150,775**	**1,410,622**	**19,500**
Total Liabilities, Deferred Inflows of Resources, and Fund Balances	**$ 17,752**	**$ 97,451**	**$ 157,078**	**$ 1,410,622**	**$ 197,574**

CITY OF ALISO VIEJO

COMBINING BALANCE SHEET
OTHER GOVERNMENTAL FUNDS
JUNE 30, 2021

	Special Revenue Funds	Capital Projects Funds		Debt Service Funds	
	AV Ranch Foundation	Capital Improvements	Storm Water	Debt Service Fund	Total Governmental Funds
Assets:					
Cash and investments	$ -	$ 138,904	$ 3,490	$ -	$ 4,394,507
Receivables:					
Accounts	100,000	-	-	-	137,726
Due from other governments	-	-	7,596	-	476,993
Total Assets	**$ 100,000**	**$ 138,904**	**$ 11,086**	**$ -**	**$ 5,009,226**
Liabilities, Deferred Inflows of Resources, and Fund Balances:					
Liabilities:					
Accounts payable	$ -	$ 138,904	$ 11,086	$ -	$ 330,031
Accrued liabilities	-	-	-	-	15,278
Due to other funds	100,000	-	-	-	153,366
Total Liabilities	**100,000**	**138,904**	**11,086**	**-**	**498,675**
Deferred Inflows of Resources:					
Unavailable revenues	-	-	-	-	82,418
Fund Balances (Deficits):					
Restricted for:					
Community services	-	-	-	-	19,500
Community development projects	-	-	-	-	1,579,149
Capital projects	-	-	-	-	2,757,870
Public safety	-	-	-	-	109,947
Unassigned	-	-	-	-	(38,333)
Total Fund Balances	**-**	**-**	**-**	**-**	**4,428,133**
Total Liabilities, Deferred Inflows of Resources, and Fund Balances	**$ 100,000**	**$ 138,904**	**$ 11,086**	**$ -**	**$ 5,009,226**

CITY OF ALISO VIEJO

COMBINING STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES OTHER GOVERNMENTAL FUNDS FOR THE YEAR ENDED JUNE 30, 2021

	Special Revenue Funds				
	Traffic Congestion Relief	Measure M	SB1 - RMRA	Public Safety Grants	Air Quality Improvement
Revenues:					
Intergovernmental	$ -	$ 724,861	$ 927,741	$ 156,731	$ 130,736
Charges for services	-	-	-	-	-
Use of money and property	1,800	12,478	13,398	2,929	19,250
Contributions	-	-	-	-	-
Developer fees	-	-	-	-	-
Total Revenues	**1,800**	**737,339**	**941,139**	**159,660**	**149,986**
Expenditures:					
Current:					
General government	-	-	-	-	-
Community development:					
Community services	-	-	-	-	-
Planning	-	-	-	-	-
Public works	-	-	-	-	-
Public safety	-	-	-	172,532	82,629
Debt service:					
Principal payment	-	-	-	-	-
Interest expense	-	-	-	-	-
Capital outlay	-	-	-	-	-
Total Eexpenditures	**-**	**-**	**-**	**172,532**	**82,629**
Excess (deficiency) of revenues over (under) expenditures	1,800	737,339	941,139	(12,872)	67,357
Other Financing Sources (Uses):					
Transfers in	-	-	-	-	-
Transfers out	(33,493)	(1,322,465)	(954,436)	-	-
Total Other Financing Sources (Uses)	**(33,493)**	**(1,322,465)**	**(954,436)**	**-**	**-**
Net change in fund balances	(31,693)	(585,126)	(13,297)	(12,872)	67,357
Fund balances, beginning of year	122,602	1,436,674	796,637	122,819	964,716
Fund balances (deficit), end of year	**$ 90,909**	**$ 851,548**	**$ 783,340**	**$ 109,947**	**$ 1,032,073**

CITY OF ALISO VIEJO

COMBINING STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES OTHER GOVERNMENTAL FUNDS FOR THE YEAR ENDED JUNE 30, 2021 (Continued)

	Special Revenue Funds				
	Integrated Waste Management	Other Grants	Technology Grants	Development Impact	Aquatic Center
Revenues:					
Intergovernmental	$ 12,595	$ 15,033	$ 119,959	$ -	$ -
Charges for services	-	-	-	-	990,156
Use of money and property	200	-	3,357	-	-
Contributions	-	-	-	-	-
Developer fees	-	-	-	585,000	-
Total Revenues	**12,795**	**15,033**	**123,316**	**585,000**	**990,156**
Expenditures:					
Current:					
General government	-	-	34,093	-	-
Community development:					
Community services	-	-	-	-	1,067,135
Planning	-	-	-	154,649	-
Public works	23,519	-	-	-	-
Public safety	-	-	-	-	-
Debt service:					
Principal payment	-	-	-	-	-
Interest expense	-	-	-	-	-
Capital outlay	-	-	-	-	-
Total Eexpenditures	**23,519**	**-**	**34,093**	**154,649**	**1,067,135**
Excess (deficiency) of revenues over (under) expenditures	(10,724)	15,033	89,223	430,351	(76,979)
Other Financing Sources (Uses):					
Transfers in	-	-	-	-	96,479
Transfers out	-	(97,451)	(134,651)	(1,642,100)	-
Total Other Financing Sources (Uses)	**-**	**(97,451)**	**(134,651)**	**(1,642,100)**	**96,479**
Net change in fund balances	(10,724)	(82,418)	(45,428)	(1,211,749)	19,500
Fund balances, beginning of year	28,476	44,085	196,203	2,622,371	-
Fund balances (deficit), end of year	**$ 17,752**	**$ (38,333)**	**$ 150,775**	**$ 1,410,622**	**$ 19,500**

CITY OF ALISO VIEJO

COMBINING STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES OTHER GOVERNMENTAL FUNDS FOR THE YEAR ENDED JUNE 30, 2021

	Special Revenue Funds	Capital Projects Funds		Debt Service Funds	
	AV Ranch Foundation	Capital Improvements	Storm Water	Debt Service Fund	Total Nonmajor Governmental Funds
Revenues:					
Intergovernmental	$ -	$ -	$ -	$ -	$ 2,087,656
Charges for services	-	-	-	-	990,156
Use of money and property	-	-	-	273	53,685
Contributions	100,000	-	-	-	100,000
Developer fees	-	-	-	-	585,000
Total Revenues	**100,000**	**-**	**-**	**273**	**3,816,497**
Expenditures:					
Current:					
General government	-	-	-	-	34,093
Community development:					
Community services	-	-	-	-	1,067,135
Planning	-	-	-	-	154,649
Public works	-	215,857	-	-	239,376
Public safety	-	-	-	-	255,161
Debt service:					
Principal payment	-	-	-	230,000	230,000
Interest expense	-	-	-	427,436	427,436
Capital outlay	-	134,651	-	-	134,651
Total Expenditures	**-**	**350,508**	**-**	**657,436**	**2,542,501**
Excess (deficiency) of revenues over (under) expenditures	100,000	(350,508)	-	(657,163)	1,273,996
Other Financing Sources (Uses):					
Transfers in	-	350,508	-	630,788	1,077,775
Transfers out	(100,000)	-	-	(4,293,320)	(8,577,916)
Total Other Financing Sources (Uses)	**(100,000)**	**350,508**	**-**	**(3,662,532)**	**(7,500,141)**
Net change in fund balances	-	-	-	(4,319,695)	(6,226,145)
Fund balances, beginning of year	-	-	-	4,319,695	10,654,278
Fund balances (deficit), end of year	**$ -**	**$ -**	**$ -**	**$ -**	**$ 4,428,133**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
TRAFFIC CONGESTION RELIEF
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 122,602**	**$ 122,602**	**$ 122,602**	**$ -**
Resources (Inflows):				
Intergovernmental	57,000	57,000	-	(57,000)
Use of money and property	2,000	2,000	1,800	(200)
Amount Available for Appropriations	**181,602**	**181,602**	**124,402**	**(57,200)**
Charges to Appropriations (Outflows):				
Transfers out	51,295	51,295	33,493	17,802
Total Charges to Appropriations	**51,295**	**51,295**	**33,493**	**17,802**
Fund Balances - Ending	**$ 130,307**	**$ 130,307**	**$ 90,909**	**$ (39,398)**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
MEASURE M
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 1,436,674**	**$ 1,436,674**	**$ 1,436,674**	**$ -**
Resources (Inflows):				
Intergovernmental	655,595	655,595	724,861	69,266
Use of money and property	15,000	15,000	12,478	(2,522)
Amount Available for Appropriations	**2,107,269**	**2,107,269**	**2,174,013**	**66,744**
Charges to Appropriations (Outflows):				
Public works	27,495	27,495	-	27,495
Transfers out	1,076,365	1,322,465	1,322,465	-
Total Charges to Appropriations	**1,103,860**	**1,349,960**	**1,322,465**	**27,495**
Fund Balances - Ending	**$ 1,003,409**	**$ 757,309**	**$ 851,548**	**$ 94,239**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
SB1 – RMRA
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 796,637**	**$ 796,637**	**$ 796,637**	**$ -**
Resources (Inflows):				
Intergovernmental	970,255	970,255	927,741	(42,514)
Use of money and property	8,000	8,000	13,398	5,398
Amount Available for Appropriations	**1,774,892**	**1,774,892**	**1,737,776**	**(37,116)**
Charges to Appropriations (Outflows):				
Transfers out	1,020,000	1,266,100	954,436	311,664
Total Charges to Appropriations	**1,020,000**	**1,266,100**	**954,436**	**311,664**
Fund Balances - Ending	**$ 754,892**	**$ 508,792**	**$ 783,340**	**$ 274,548**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
PUBLIC SAFETY GRANTS
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - beginning	**$ 122,819**	**$ 122,819**	**$ 122,819**	**$ -**
Resources (Inflows):				
Intergovernmental	175,000	175,000	156,731	(18,269)
Use of money and property	2,000	2,000	2,929	929
Amount Available for Appropriations	**299,819**	**299,819**	**282,479**	**(17,340)**
Charges to Appropriations (Outflows):				
Public safety	171,245	171,245	172,532	(1,287)
Total Charges to Appropriations	**171,245**	**171,245**	**172,532**	**(1,287)**
Fund Balances - Ending	**$ 128,574**	**$ 128,574**	**$ 109,947**	**$ (18,627)**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
AIR QUALITY IMPROVEMENT
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 964,716**	**$ 964,716**	**$ 964,716**	**$ -**
Resources (Inflows):				
Intergovernmental	65,000	122,365	130,736	8,371
Use of money and property	15,000	15,000	19,250	4,250
Amount Available for Appropriations	**1,044,716**	**1,102,081**	**1,114,702**	**12,621**
Charges to Appropriations (Outflows):				
Public safety	130,000	166,040	82,629	83,411
Total Charges to Appropriations	**130,000**	**166,040**	**82,629**	**83,411**
Fund Balances - Ending	**$ 914,716**	**$ 936,041**	**$ 1,032,073**	**$ 96,032**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
INTEGRATED WASTE MANAGEMENT
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 28,476**	**$ 28,476**	**$ 28,476**	**$ -**
Resources (Inflows):				
Intergovernmental	12,880	12,880	12,595	(285)
Use of money and property	250	250	200	(50)
Amount Available for Appropriations	**41,606**	**41,606**	**41,271**	**(335)**
Charges to Appropriations (Outflows):				
Public works	12,500	23,700	23,519	181
Total Charges to Appropriations	**12,500**	**23,700**	**23,519**	**181**
Fund Balances - Ending	**$ 29,106**	**$ 17,906**	**$ 17,752**	**$ (154)**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
OTHER GRANTS
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 44,085**	**$ 44,085**	**$ 44,085**	**$ -**
Resources (Inflows):				
Intergovernmental	160,000	310,000	15,033	(294,967)
Use of money and property	750	750	-	(750)
Amount Available for Appropriations	**204,835**	**354,835**	**59,118**	**(295,717)**
Charges to Appropriations (Outflows):				
Transfers out	-	310,000	97,451	212,549
Total Charges to Appropriations	**-**	**310,000**	**97,451**	**212,549**
Fund Balances (Deficit) - Ending	**$ 204,835**	**$ 44,835**	**$ (38,333)**	**$ (83,168)**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
TECHNOLOGY GRANTS
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 196,203**	**$ 196,203**	**$ 196,203**	**$ -**
Resources (Inflows):				
Intergovernmental	145,000	145,000	119,959	(25,041)
Use of money and property	1,500	1,500	3,357	1,857
Amount Available for Appropriations	**342,703**	**342,703**	**319,519**	**(23,184)**
Charges to Appropriations (Outflows):				
General government	69,750	69,750	34,093	35,657
Transfers out	100,000	137,500	134,651	2,849
Total Charges to Appropriations	**169,750**	**207,250**	**168,744**	**38,506**
Fund Balances - Ending	**$ 172,953**	**$ 135,453**	**$ 150,775**	**$ 15,322**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
DEVELOPMENT IMPACT
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ 2,622,371**	**$ 2,622,371**	**$ 2,622,371**	**$ -**
Resources (Inflows):				
Developer fees	-	-	585,000	585,000
Amounts Available for Appropriations	**2,622,371**	**2,622,371**	**3,207,371**	**585,000**
Charges to Appropriations (Outflows):				
Planning	-	-	154,649	(154,649)
Transfers out	1,860,000	1,642,100	1,642,100	-
Total Charges to Appropriations	**1,860,000**	**1,642,100**	**1,796,749**	**(154,649)**
Fund Balances - Ending	**$ 762,371**	**$ 980,271**	**$ 1,410,622**	**$ 430,351**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
AQUATIC CENTER
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ -**	**$ -**	**$ -**	**$ -**
Resources (Inflows):				
Charges for services	845,000	781,000	990,156	209,156
Transfers in	122,310	149,280	96,479	(52,801)
Amounts Available for Appropriations	**967,310**	**930,280**	**1,086,635**	**156,355**
Charges to Appropriations (Outflows):				
Community services	967,310	930,280	1,067,135	(136,855)
Total Charges to Appropriations	**967,310**	**930,280**	**1,067,135**	**(136,855)**
Fund Balances - Ending	**$ -**	**$ -**	**$ 19,500**	**$ 19,500**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
STREET IMPROVEMENTS – MAJOR FUND
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ -**	**$ -**	**$ -**	**$ -**
Resources (Inflows):				
Transfer in	2,147,660	2,639,860	2,327,098	(312,762)
Amounts Available for Appropriations	**2,147,660**	**2,639,860**	**2,327,098**	**(312,762)**
Charges to Appropriations (Outflows):				
Public works	2,147,660	2,639,860	2,327,098	312,762
Total Charges to Appropriations	**2,147,660**	**2,639,860**	**2,327,098**	**312,762**
Fund Balances - Ending	**$ -**	**$ -**	**$ -**	**$ -**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
CAPITAL IMPROVEMENTS
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ -**	**$ -**	**$ -**	**$ -**
Resources (Inflows):				
Transfers in	275,000	511,130	350,508	(160,622)
Amounts Available for Appropriations	**275,000**	**511,130**	**350,508**	**(160,622)**
Charges to Appropriations (Outflows):				
Public works	140,349	376,479	215,857	160,622
Capital outlay	134,651	134,651	134,651	-
Total Charges to Appropriations	**275,000**	**511,130**	**350,508**	**160,622**
Fund Balances - Ending	**$ -**	**$ -**	**$ -**	**$ -**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
STORM WATER
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ -**	**$ -**	**$ -**	**$ -**
Resources (Inflows):				
Transfers in	30,000	30,000	-	(30,000)
Amounts Available for Appropriations	**30,000**	**30,000**	**-**	**(30,000)**
Charges to Appropriations (Outflows):				
Public works	30,000	30,000	-	30,000
Total Charges to Appropriations	**30,000**	**30,000**	**-**	**30,000**
Fund Balances - Ending	**$ -**	**$ -**	**$ -**	**$ -**

CITY OF ALISO VIEJO

BUDGETARY COMPARISON SCHEDULE
COP 2019 – MAJOR FUND
FOR THE YEAR ENDED JUNE 30, 2021

	Budget Amounts		Actual	Variance with Final Budget Positive
	Original	Final	Amounts	(Negative)
Fund Balances - Beginning	**$ -**	**$ -**	**$ -**	**$ -**
Resources (Inflows):				
Use of money and property	-	100,000	-	(100,000)
Transfers in	7,545,590	10,307,150	10,240,431	(66,719)
Amounts Available for Appropriations	**7,545,590**	**10,407,150**	**10,240,431**	**(166,719)**
Charges to Appropriations (Outflows):				
Public works	6,895,590	66,719	-	66,719
Capital outlay	650,000	-	10,240,431	(10,240,431)
Transfers out	-	100,000	-	100,000
Total Charges to Appropriations	**7,545,590**	**166,719**	**10,240,431**	**(10,073,712)**
Fund Balances - Ending	**$ -**	**$ 10,240,431**	**$ -**	**$(10,240,431)**

CUSTODIAL FUNDS

Custodial Funds are used to account for the assets held by the City as an agent for individuals, private organizations and other government units. The City of Aliso Viejo has the following Custodial Funds:

Community Trust

This fund is used to account for funding received from the Aliso Viejo Community Foundation, a non-profit organization. The foundation holds fundraisers and provides opportunities for donors to contribute to the Aliso Viejo Community programs.

CFD 2005-01

This fund is used to account for CFD 2005-01 Mello Roos funds held with the City's fiscal agent. Funds held by the fiscal agent include special taxes and the reserve funds for the payment of the bonds.

Renewable Farms

This fund is used to account for the operations of the Renewable Farms facility. Renewable Farms is a City owned outdoor facility that serves as a venue to accommodate an array of functions such as wedding celebrations and private events.

CITY OF ALISO VIEJO

COMBINING STATEMENT OF FIDUCIARY NET POSITION
ALL CUSTODIAL FUNDS
JUNE 30, 2021

	Community Trust	CFD 2005-1	Renewable Farms	Total
Assets:				
Cash and investments	$ 10,610	$ (1,640)	$ 44,353	$ 53,323
Restricted cash and investments	-	4,503,808	-	4,503,808
Due from other governments	-	26,866	-	26,866
Total assets	10,610	4,529,034	44,353	4,583,997
Liabilities:				
Accounts payable	-	1,949	44,353	46,302
Deposits payable	5,544	-	-	5,544
Total liabilities	5,544	1,949	44,353	51,846
Net position:				
Restricted for organizations and other governments	5,066	4,527,085	-	4,532,151
Total net position	$ 5,066	$ 4,527,085	$ -	$ 4,532,151

CITY OF ALISO VIEJO

COMBINING STATEMENT OF CHANGES IN FIDUCIARY NET POSITION
ALL CUSTODIAL FUNDS
YEAR ENDED JUNE 30, 2021

	Community Trust	CFD 2005-1	Renewable Farms	Total
Additions:				
Assessments	$ -	$ 2,033,263	$ -	$ 2,033,263
Events and rentals	-	-	169,475	169,475
Interest income	5,066	-	-	5,066
Total additions	5,066	2,033,263	169,475	2,207,804
Deductions:				
Administrative expenses	-	-	169,475	169,475
Payments to bondholders:				
Principal	-	700,000	-	700,000
Interest	-	1,475,064	-	1,475,064
Total deductions	-	2,175,064	169,475	2,344,539
Net increase (decrease) in fiduciary net position	5,066	(141,801)	-	(136,735)
Net position, beginning of year, as restated (Note 15)	-	4,668,886	-	4,668,886
Net position, end of year	$ 5,066	$ 4,527,085	$ -	$ 4,532,151

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STATISTICAL SECTION

This part of the City of Aliso Viejo's comprehensive annual financial report presents detailed information as a context for understanding what the information in the financial statements, note disclosures, and required supplementary information say about the government's overall financial health.

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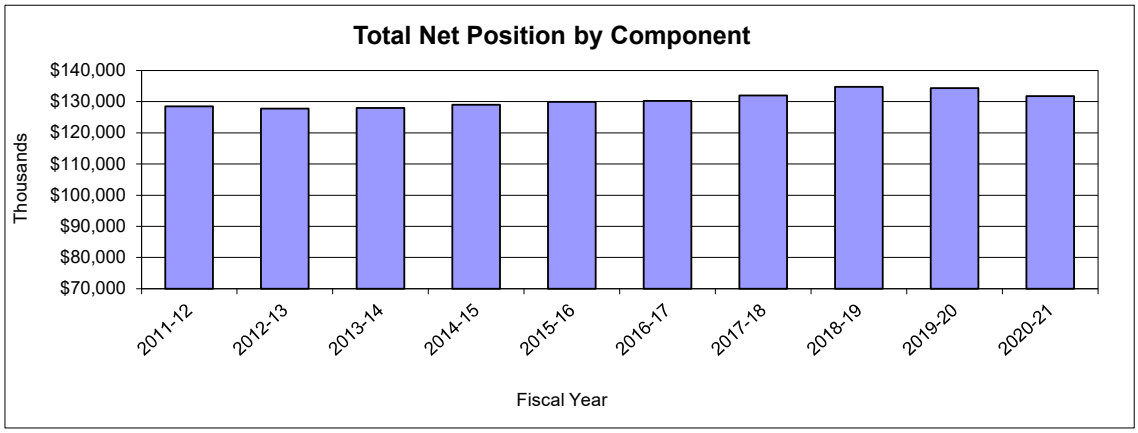
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CITY OF ALISO VIEJO

NET POSITION BY COMPONENT
LAST TEN FISCAL YEARS

	Fiscal Years				
	2011-12	2012-13	2013-14	2014-15	2015-16
Governmental Activities					
Net Investment in Capital Assets	$ 89,945,456	$ 89,326,107	$ 95,679,944	$ 95,155,183	$ 94,579,142
Restricted					
Community Development	1,220,163	770,031	731,008	482,242	279,027
Public Works	12,261,269	11,351,165	11,451,213	12,018,986	11,840,453
Public Safety	48,733	57,693	84,886	-	12,953
Debt Service	515,936	515,759	-	-	-
Unrestricted	24,562,723	25,767,983	20,080,095	21,354,275	23,233,017
Total governmental activities net position	$ 128,554,280	$ 127,788,738	$ 128,027,146	$ 129,010,686	$ 129,944,592

	Fiscal Years				
	2016-17	2017-18	2018-19	2019-20	2020-21
Governmental Activities					
Net Investment in Capital Assets	$ 95,000,131	$ 94,791,785	$ 95,555,817	$ 91,372,419	$ 101,009,829
Restricted					
Community Development	(34,396)	203,708	334,190	2,891,135	1,579,149
Community Services	-	-	-	-	19,500
Public Works	8,299,848	7,637,647	8,536,428	122,819	3,498,519
Public Safety	39,957	83,097	105,213	4,121,343	125,356
Debt Service	-	-	-	4,319,695	-
Unrestricted	26,937,175	29,312,285	30,211,693	31,507,850	25,601,465
Total governmental activities net position	$ 130,242,715	$ 132,028,522	$ 134,743,341	$ 134,335,261	$ 131,833,818

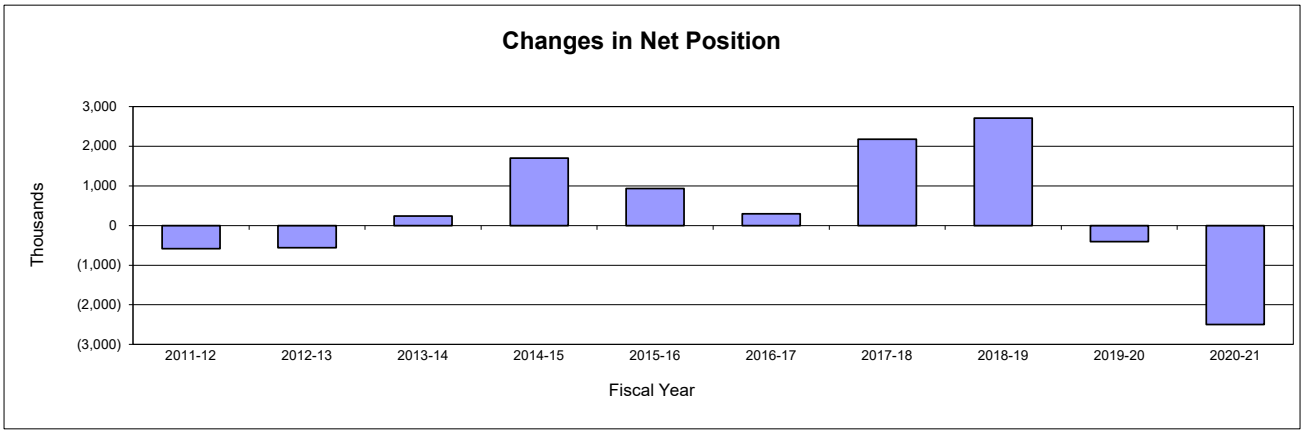


Source: City Finance Department

CITY OF ALISO VIEJO

CHANGE IN NET POSITION
LAST TEN FISCAL YEARS

	Fiscal Years									
	2011-12	**2012-13**	**2013-14**	**2014-15**	**2015-16**	**2016-17**	**2017-18**	**2018-19**	**2019-20**	**2020-21**
Revenues										
Program Revenues										
Charges for Services	$ 2,071,956	$ 1,861,661	$ 1,853,679	$ 2,287,957	$ 2,654,055	$ 3,474,104	$ 4,202,366	$ 3,836,994	$ 3,070,201	$ 4,001,459
Operating Contributions & Grants	5,362,500	2,604,100	3,902,695	2,682,605	2,770,178	3,672,804	2,805,856	5,171,638	4,342,486	4,852,523
Capital Contributions & Grants	-	-	99,283	99,283	18,875	17,831	-	-	9,600	-
Taxes										
Sales Tax	4,180,373	4,685,598	4,814,560	4,795,433	4,601,042	6,236,832	6,545,732	6,128,143	4,765,921	3,524,908
Property Tax	5,963,627	6,379,228	6,441,021	6,741,164	7,317,139	7,503,432	7,936,613	8,211,394	8,647,685	8,981,521
Franchise Fees	1,479,666	1,487,395	1,511,450	1,584,358	1,573,339	1,507,041	1,577,213	1,829,070	1,729,418	1,672,280
Transient Occupancy Tax	711,136	780,075	862,294	916,286	1,108,102	1,606,165	1,696,598	1,640,628	1,220,997	723,599
Motor Vehicle License Fees	-	25,112	20,991	20,470	20,256	22,627	26,483	24,936	40,659	36,704
Use of Money and Property	99,060	66,734	72,969	273,901	328,416	324,781	402,978	790,051	1,053,024	377,709
Other	147,925	79,919	61,559	132,872	195,831	186,455	191,376	174,274	292,184	292,095
Total Revenues	20,016,243	17,969,822	19,640,501	19,534,329	20,587,233	24,552,072	25,385,215	27,807,128	25,172,175	24,462,798
Expenses										
General Government	2,704,442	2,993,646	3,030,088	3,189,090	3,459,012	4,139,974	4,418,462	4,725,232	4,878,395	5,621,731
Community Services	1,867,175	1,935,808	2,139,277	2,221,206	2,982,463	3,433,106	3,771,964	3,878,633	3,433,829	3,695,994
Community Development	1,646,325	1,676,713	1,615,338	1,635,629	1,450,043	3,824,732	1,735,901	1,601,865	1,830,144	1,754,782
Public Works	7,347,932	4,927,121	5,246,908	3,360,251	4,038,360	4,484,898	4,444,500	5,924,079	5,631,039	6,016,332
Public Safety	6,658,558	6,637,899	7,022,580	7,427,581	7,723,449	8,371,239	8,831,639	8,962,500	9,312,287	9,480,235
Interest and Fiscal Charges	378,205	360,975	347,902	-	-	-	-	-	494,561	395,167
Total Expense	20,602,637	18,532,162	19,402,093	17,833,757	19,653,327	24,253,949	23,202,466	25,092,309	25,580,255	26,964,241
Change in net Position	$ (586,394)	$ (562,340)	$ 238,408	$ 1,700,572	$ 933,906	$ 298,123	$ 2,182,749	$ 2,714,819	$ (408,080)	$ (2,501,443)



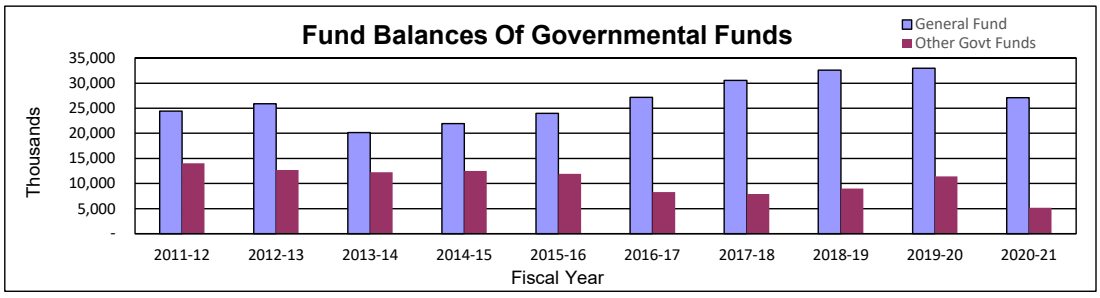
Source: City Finance Department

CITY OF ALISO VIEJO

FUND BALANCES OF GOVERNMENTAL FUNDS
LAST TEN FISCAL YEARS

	Fiscal Years				
	2011-12	**2012-13**	**2013-14**	**2014-15**	**2015-16**
General Fund Balances					
Nonspendable:					
Prepaid	$ 86,492	$ 130,620	$ 111,045	$ 146,132	$ 187,681
Assigned to:					
Contingencies	4,693,673	4,000,331	4,127,631	4,229,500	4,351,653
Self Insurance/benefit obligations	471,450	570,000	570,000	738,900	724,000
Asset Replacement	8,288,000	8,657,715	9,065,735	9,440,700	9,850,000
Emergencies & Unanticipated Traffic Projects	2,500,000	500,000	1,500,000	1,500,000	1,500,000
800 MHZ Upgrade & Replacement	-	-	262,000	262,000	-
Long Term Debt	5,000,000	7,335,000	-	-	-
Unassigned:	3,385,179	4,709,175	4,521,835	5,616,888	7,374,518
Total General Fund	$ 24,424,794	$ 25,902,841	$ 20,158,246	$ 21,934,120	$ 23,987,852
All other govenmental funds					
Nonspendable:					
Prepaid Costs and Inventory	$ 4,132	$ 30,942	$ 30,562	$ 4,272	$ 14,127
Assigned to:					
Emergencies and Unanticipated Traffic Projects	-	-	-	-	-
Restricted For:					
Community Development Projects	1,220,163	770,031	731,008	482,242	278,992
Public Safety	48,733	57,693	84,886	-	-
Capital Projects	12,261,269	11,351,165	11,451,213	12,018,986	11,853,406
Debt Service	515,936	515,759	-	-	-
Unassigned:	4,611	(23,971)	(30,562)	(19,027)	(198,271)
Total All Other Governmental Funds	$ 14,054,844	$ 12,701,619	$ 12,267,107	$ 12,486,473	$ 11,948,254

	Fiscal Years				
	2016-17	**2017-18**	**2018-19**	**2019-20**	**2020-21**
General Fund Balances					
Nonspendable:					
Prepaid Costs and Inventory	$ 231,198	$ 206,488	$ 222,029	$ 236,326	$ 76,150
Assigned to:					
Contingencies	4,681,192	4,700,000	2,963,795	2,860,265	2,649,388
Self Insurance/benefit obligations	1,200,000	1,200,000	900,000	1,445,475	1,150,474
Asset Replacement	10,044,448	10,000,000	9,700,000	9,096,430	8,317,710
Emergencies and Unanticipated Traffic Projects	1,500,000	1,500,000	15,000,000	15,000,000	15,000,000
800 MHZ Upgrade & Replacement	-	-	-	-	-
Unassigned:	9,509,904	12,935,238	3,811,349	4,332,263	(62,559)
Total General Fund	$ 27,166,742	$ 30,541,726	$ 32,597,173	$ 32,970,759	$ 27,131,163
All other govenmental funds					
Nonspendable:					
Prepaid	$ 25,041	$ -	$ -	$ -	$ 9,250
Assigned to:					
Emergencies & Unanticipated Traffic Projects	-	-	-	-	-
Restricted For:					
Community Services	-	-	-	-	19,500
Community Development Projects	19,736	203,708	334,190	2,891,135	1,579,149
Public Safety	39,957	83,097	105,213	122,819	125,356
Capital Projects	8,299,848	7,637,647	8,536,428	4,121,343	3,498,519
Debt Service	-	-		4,319,695	-
Unassigned:	(79,173)	-	-		(47,583)
Total All Other Governmental Funds	$ 8,305,409	$ 7,924,452	$ 8,975,831	$ 11,454,992	$ 5,184,191

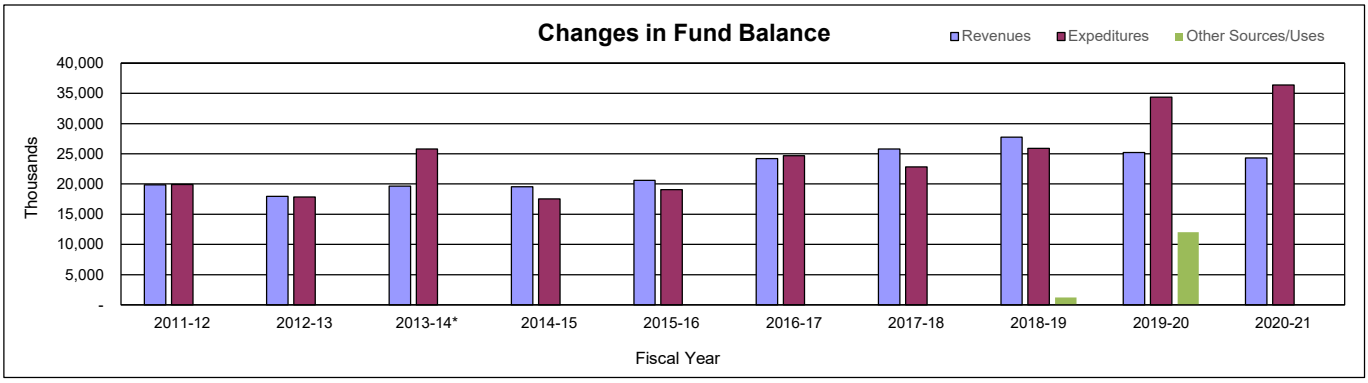


Source: City Finance Department

CITY OF ALISO VIEJO

CHANGES IN FUND BALANCES OF GOVERNMENTAL FUNDS
LAST TEN FISCAL YEARS

	Fiscal Years									
	2011-12	2012-13	2013-14*	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Revenues										
Taxes	$ 12,350,386	$ 13,348,264	$ 13,648,081	$ 14,064,937	$ 14,629,530	$ 16,884,140	$ 17,777,707	$ 17,704,139	$ 16,270,976	$ 14,823,926
Licenses and Permits	493,121	482,730	377,459	676,218	694,054	664,202	957,209	706,764	719,720	976,781
Intergovernmental	3,255,558	2,090,978	2,858,226	2,189,004	2,617,535	2,585,675	2,963,077	4,218,802	4,208,995	3,987,463
Charges for Services	945,900	817,633	1,029,007	1,190,138	1,639,479	2,519,225	2,864,619	2,639,775	2,047,978	2,198,864
Fines and Forfeitures	392,231	327,174	271,644	415,671	312,400	282,322	300,988	307,513	275,229	310,419
Developer Fees	1,931,591	355,137	992,783	521,859	30,500	536,182	-	715,000	9,600	585,000
Contributions From Property Owners	-	-	-	42,894	-	-	-	-	-	100,000
Investment Income	119,852	79,856	87,332	83,811	150,692	176,274	341,899	903,790	1,091,863	1,068,212
Rental Income	275,834	262,247	244,838	204,514	208,225	182,749	182,830	248,340	166,246	-
Other	107,704	205,803	131,131	145,283	325,612	387,838	421,734	333,252	423,194	253,836
Total Revenues	19,872,177	17,969,822	19,640,501	19,534,329	20,608,027	24,218,607	25,810,063	27,777,375	25,213,801	24,304,501
Expeditures										
General Government	2,299,137	2,632,999	2,744,983	3,101,820	3,079,528	3,797,104	3,907,504	4,368,307	4,370,213	5,110,883
Community Development	3,483,691	3,549,268	3,663,530	3,821,432	4,485,482	7,267,554	5,479,501	5,504,012	5,177,202	5,381,558
Public Works	6,804,027	4,421,239	4,705,326	2,940,272	3,557,336	3,605,820	3,962,004	5,441,582	5,148,542	5,531,650
Public Safety	6,640,088	6,624,180	7,014,723	7,407,531	7,677,426	8,030,234	8,730,712	8,844,067	9,170,586	9,358,289
Capital Outlay	163,486	103,249	4,457	268,034	292,742	1,981,850	736,315	1,723,775	10,006,820	10,375,082
Debt Service										
Principal	150,000	155,000	7,335,000	-	-	-	-	-	-	230,000
Interest	367,765	359,065	351,590	-	-	-	-	-	494,561	427,436
Other Charges									-	-
Total Expenditures	19,908,194	17,845,001	25,819,608	17,539,088	19,092,514	24,682,562	22,816,036	25,881,743	34,367,924	36,414,898
Excess of Revenues over Expeditures	(36,017)	124,821	(6,179,107)	1,995,241	1,515,513	(463,955)	2,994,027	1,895,632	(9,154,123)	(12,110,397)
Other Financing Sources (Uses)										
Transfers In	3,871,339	2,284,326	9,422,668	1,209,782	2,040,859	3,517,923	2,548,103	3,708,774	13,309,198	14,573,345
Transfers Out	(3,871,339)	(2,284,326)	(9,422,668)	(1,209,782)	(2,040,859)	(3,517,923)	(2,548,103)	(3,708,774)	(13,309,198)	(14,573,345)
Bonds Issued**	-	-	-	-	-			1,211,194	12,006,870	-
Total Other Financing Sources (Uses)	-	-	-	-	-	-	-	1,211,194	12,006,870	-
Net Change in Fund Bal.	$ (36,017)	$ 124,821	$ (6,179,107)	$ 1,995,241	$ 1,515,513	$ (463,955)	$ 2,994,027	$ 3,106,826	$ 2,852,747	$ (12,110,397)
Debt Service as a % of Noncapital Expenditures	2.62%	2.90%	29.78%	0.00%	0.00%	0.00%	0.00%	0.00%	2.03%	2.52%



** Fiscal Year 2013-14 debt service includes payoff of the City Hall COP bond.*

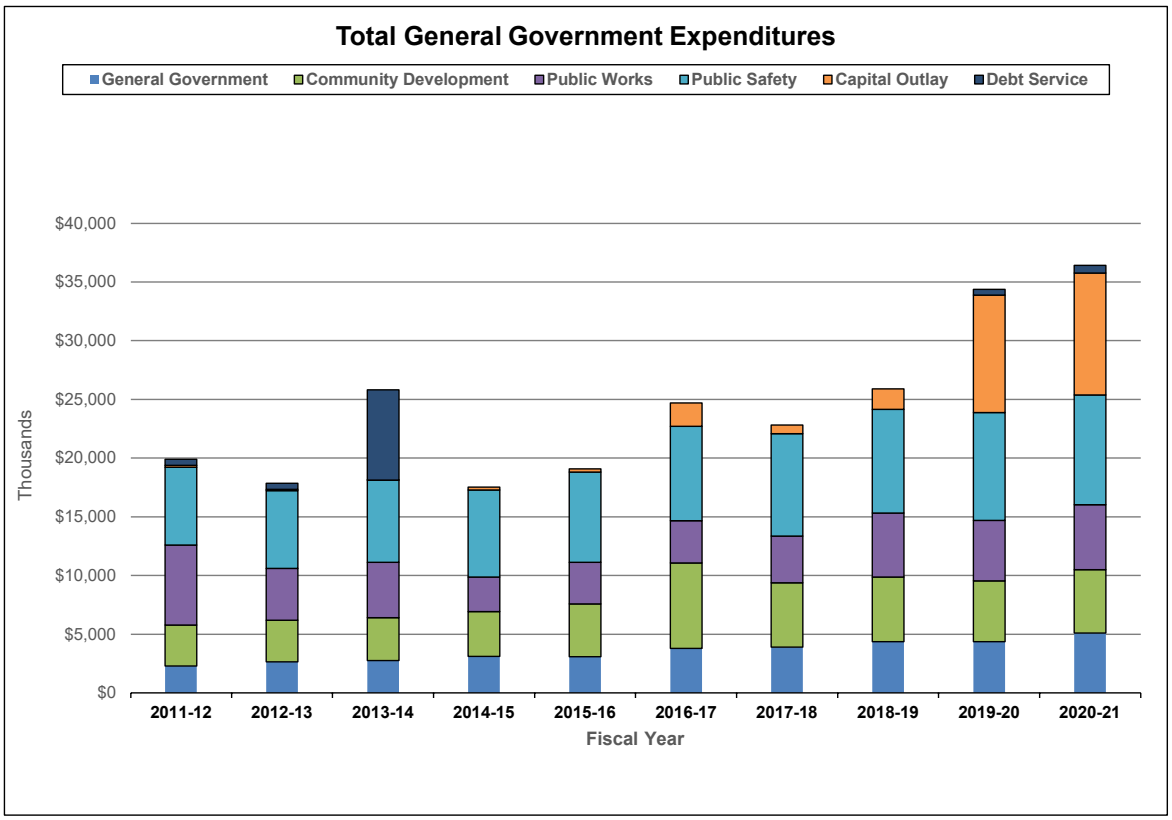
***In anticipation of the issuance of tax-exempt obligations for the Aliso Viejo Ranch project, the City Council passed a reimbursement resolution on February 20, 2019. The resolution would allow the City to reimburse itself for expenditures relating to the Aliso Viejo Ranch Project. On August 13, 2019, the City issued $12,250,000 of tax-exempt Certificates of Participation to provide financing for the construction of the Aliso Viejo Ranch.*

Source: City Finance Department

CITY OF ALISO VIEJO

GENERAL GOVERNMENT - EXPENDITURES BY FUNCTION
LAST TEN FISCAL YEARS

Fiscal Year	General Government	Community Development	Public Works	Public Safety	Capital Outlay	Debt Service	Total
2011-12	2,299,137	3,483,691	6,804,027	6,640,088	163,486	517,765	19,908,194
2012-13	2,632,999	3,549,268	4,421,239	6,624,180	103,249	514,065	17,845,000
2013-14 *	2,744,983	3,663,530	4,705,326	7,014,723	4,457	7,686,590	25,819,608
2014-15 *	3,101,820	3,821,432	2,940,272	7,407,531	268,034	-	17,539,089
2015-16	3,079,528	4,485,482	3,557,336	7,677,426	292,742	-	19,092,514
2016-17	3,797,104	7,267,554	3,605,820	8,030,234	1,981,850	-	24,682,562
2017-18	3,907,504	5,479,501	3,962,004	8,730,712	736,315	-	22,816,036
2018-19	4,368,307	5,504,012	5,441,582	8,844,067	1,723,775	-	25,881,743
2019-20	4,370,213	5,177,202	5,148,542	9,170,586	10,006,820	494,561	34,367,924
2020-21	5,110,883	5,381,558	5,531,650	9,358,289	10,375,082	657,436	36,414,898



** Fiscal Year 2013-14 debt service includes payoff of the City Hall COP bond.*

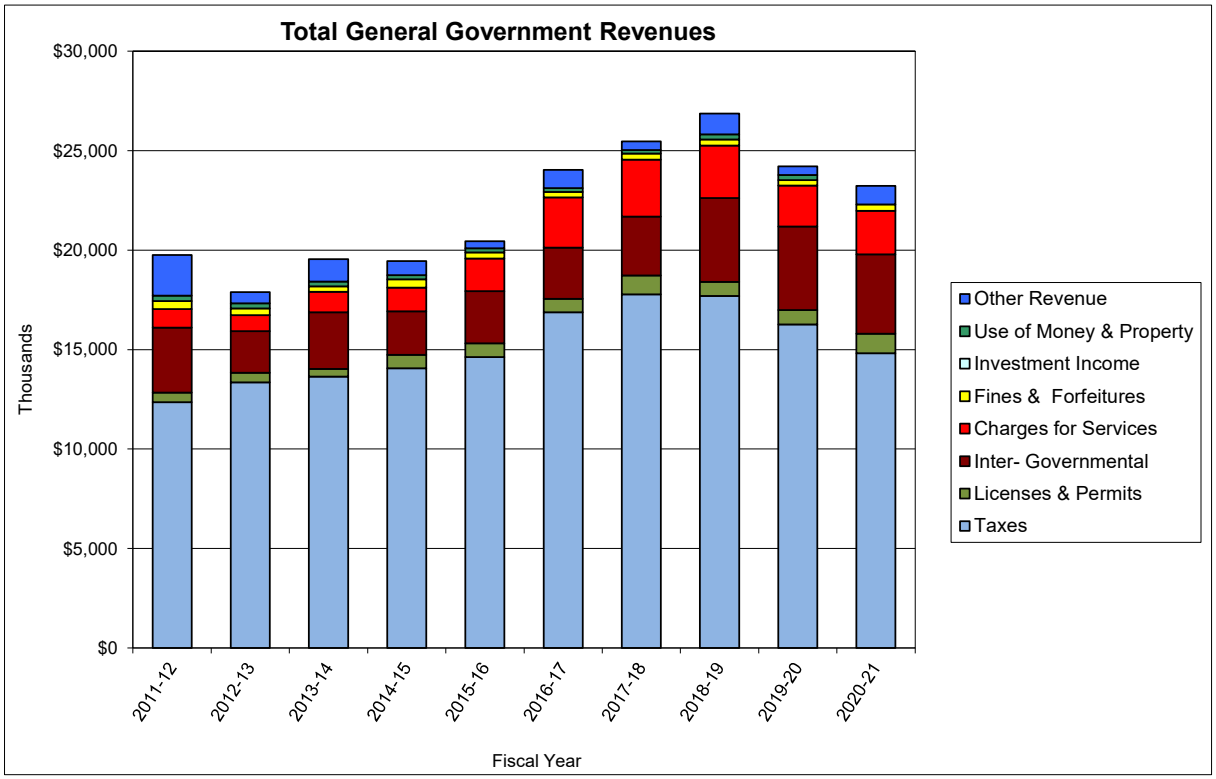
***Includes General and Special Revenue Funds.*

Source: City Finance Department

CITY OF ALISO VIEJO

GENERAL GOVERNMENT - REVENUES BY SOURCE
LAST TEN FISCAL YEARS

Fiscal Year	Taxes	Licenses & Permits	Inter-Governmental	Charges for Services	Fines & Forfeitures	Investment Income	Use of Money & Property	Other Revenue	Total
2011-12	$ 12,350,386	$ 493,121	$ 3,255,560	$ 945,896	$ 392,231	$ 119,849	$ 275,834	$ 2,039,295	$19,872,172
2012-13	13,348,264	482,730	2,090,978	817,633	327,174	79,856	262,247	560,940	17,969,822
2013-14	13,648,082	377,459	2,858,224	1,029,005	271,644	87,334	244,838	1,123,915	19,640,501
2014-15	14,064,937	676,218	2,189,004	1,190,138	415,671	83,811	204,514	710,036	19,534,329
2015-16	14,629,530	694,054	2,617,535	1,639,479	312,400	150,692	208,225	356,112	20,608,027
2016-17	16,884,140	664,202	2,585,675	2,519,225	282,322	176,274	182,749	924,020	24,218,607
2017-18	17,777,707	957,209	2,963,077	2,864,619	300,988	341,899	182,830	421,734	25,810,063
2018-19	17,704,139	706,763	4,218,803	2,639,775	307,513	903,790	248,340	1,048,252	27,777,375
2019-20	16,270,976	719,720	4,208,995	2,047,978	275,229	997,267	260,842	432,794	25,213,801
2020-21	14,823,926	976,781	3,987,463	2,198,864	310,419	1,068,212	-	938,836	24,304,501



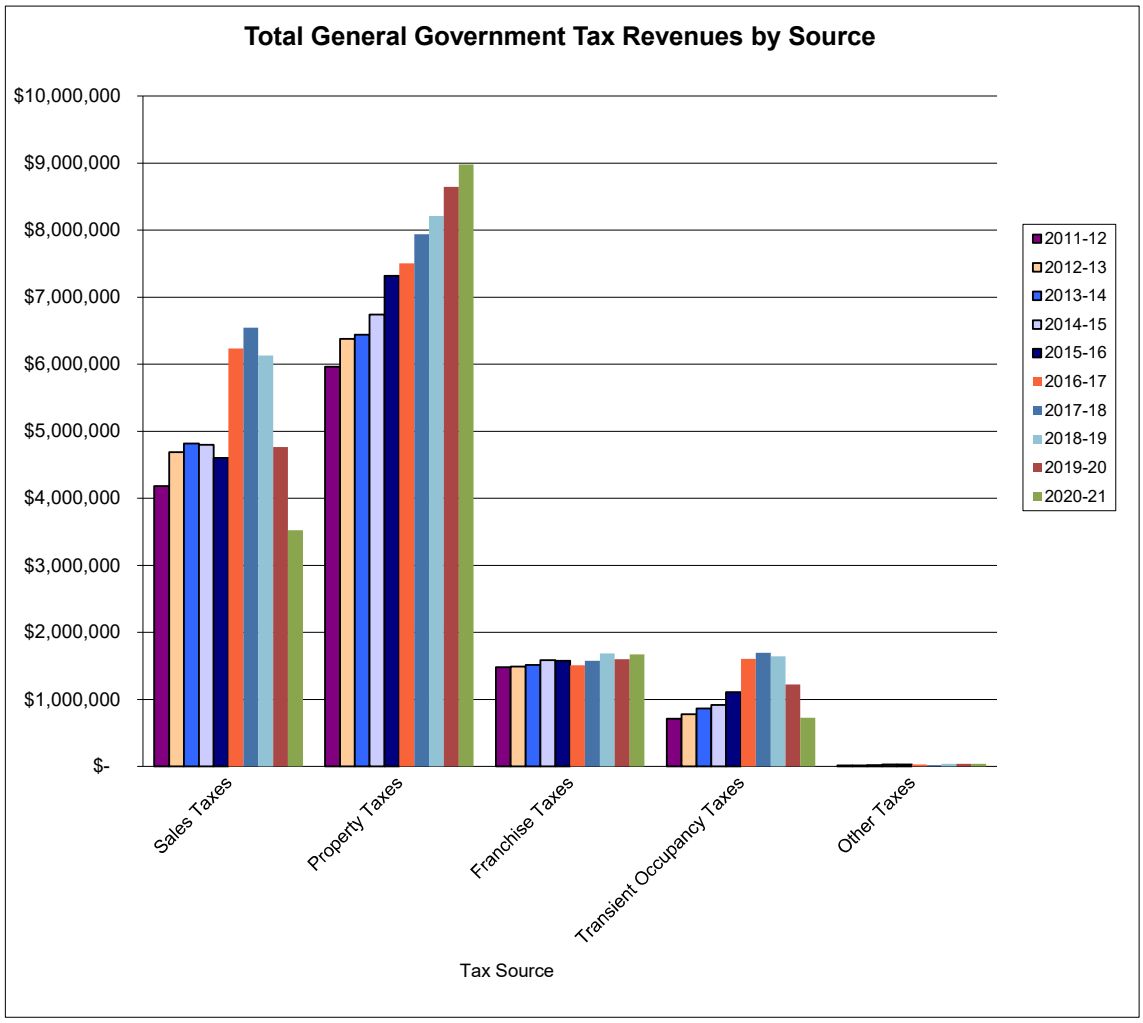
*** Includes General and Special Revenue Funds.*

Source: City Finance Department

CITY OF ALISO VIEJO

GENERAL GOVERNMENT - TAX REVENUES BY SOURCE
LAST TEN FISCAL YEARS

Fiscal Year	Sales Taxes	Property Taxes	Franchise Taxes	Transient Occupancy Taxes	Other Taxes	Total
2011-12	$ 4,180,373	$ 5,963,627	$ 1,479,666	$ 711,136	$ 15,584	$ 12,350,386
2012-13	4,685,598	6,379,228	1,487,395	780,075	15,968	13,348,264
2013-14	4,814,560	6,441,021	1,511,450	862,294	18,756	13,648,081
2014-15	4,795,433	6,741,164	1,584,358	916,286	27,696	14,064,937
2015-16	4,601,042	7,317,139	1,573,339	1,108,102	29,908	14,629,530
2016-17	6,236,832	7,503,432	1,507,041	1,606,165	30,670	16,884,140
2017-18	6,545,732	7,936,613	1,577,213	1,696,598	21,551	17,777,707
2018-19	6,128,143	8,211,394	1,685,807	1,640,628	38,167	17,704,139
2019-20	4,765,921	8,647,685	1,598,246	1,220,997	38,127	16,270,976
2020-21	3,524,908	8,981,521	1,672,280	723,599	36,704	14,823,926



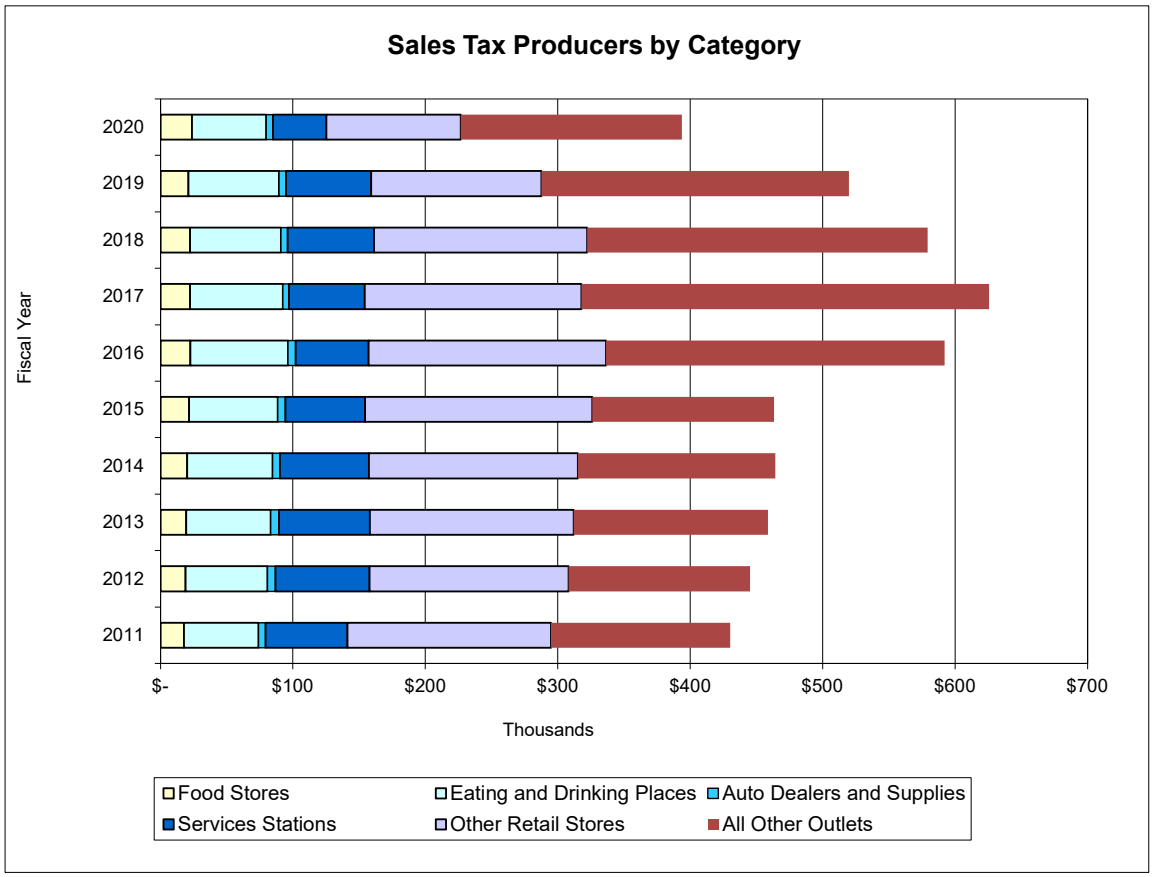
Source: City Finance Department

CITY OF ALISO VIEJO

PRINCIPAL SALES TAX PRODUCERS BY CATEGORY (IN THOUSANDS)
LAST TEN CALENDAR YEARS

	2011	2012	2013	2014	2015
Food Stores	$ 17,853	$ 18,951	$ 19,427	$ 20,207	$ 21,587
Eating and Drinking Places	56,217	61,964	63,977	64,456	66,965
Auto Dealers and Supplies	5,293	6,033	6,158	5,572	5,783
Services Stations	61,892	71,050	68,668	67,240	60,348
Other Retail Stores	153,572	150,222	153,979	157,728	171,341
All Other Outlets	135,400	137,008	146,435	149,105	137,236
Total	$ 430,227	$ 445,228	$ 458,644	$ 464,308	$ 463,260

	2016	2017	2018	2019	2020
Food Stores	$ 22,672	$ 22,453	$ 22,417	$ 21,189	$ 23,953
Eating and Drinking Places	73,680	70,004	68,546	68,415	55,945
Auto Dealers and Supplies	5,778	4,600	5,132	5,175	4,999
Services Stations	55,123	57,190	65,183	64,485	40,561
Other Retail Stores	179,245	163,533	161,056	128,344	101,270
All Other Outlets	255,663	307,956	256,903	232,318	167,024
Total	$ 592,161	$ 625,736	$ 579,237	$ 519,926	$ 393,752

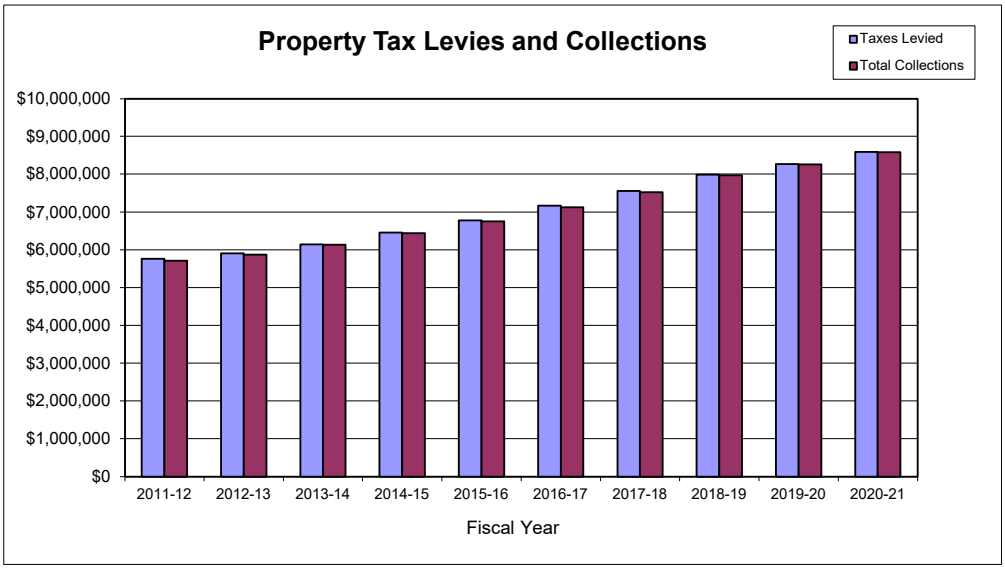


Source: State Board of Equalization, California Department of Taxes and Fees Administration, State Controller's Office, The HdL Companies

CITY OF ALISO VIEJO

PROPERTY TAX LEVIES AND COLLECTIONS
LAST TEN FISCAL YEARS

Fiscal Year	Taxes Levied for the Fiscal Year	Collected within the Fiscal Year of Levy		Collections in Subsequent Years [2]	Total Levy Collections to Date [3]	
		Amount	Percent of Levy		Amount	Percent of Levy
2011-12	$ 5,757,757	$ 5,671,091	98.67%	$ 40,073	$ 5,711,164	99.37%
2012-13	5,902,705	5,830,184	98.77%	37,843	5,868,027	99.41%
2013-14	6,139,991	6,109,976	99.51%	26,570	6,136,546	99.94%
2014-15	6,453,445	6,412,710	99.37%	23,671	6,436,381	99.74%
2015-16	6,778,670	6,724,355	99.20%	22,577	6,746,932	99.53%
2016-17	7,167,823	7,103,256	99.10%	21,428	7,124,684	99.40%
2017-18	7,559,194	7,499,294	99.21%	25,595	7,524,890	99.55%
2018-19	7,985,095	7,948,958	99.55%	19,426	7,968,384	99.79%
2019-20	8,269,551	8,233,770	99.57%	20,806	8,254,576	99.82%
2020-21	8,585,769	8,556,212	99.66%	20,806	8,577,018	99.90%



[1] *Includes amounts received for Property Tax-In Lieu of VLF*

[2] *The column includes the total amount of delinquent taxes collected in each fiscal year. The Orange County Auditor-Controller tax ledger does not provide detailed information regarding the levy year to which delinquent tax collections pertain.*

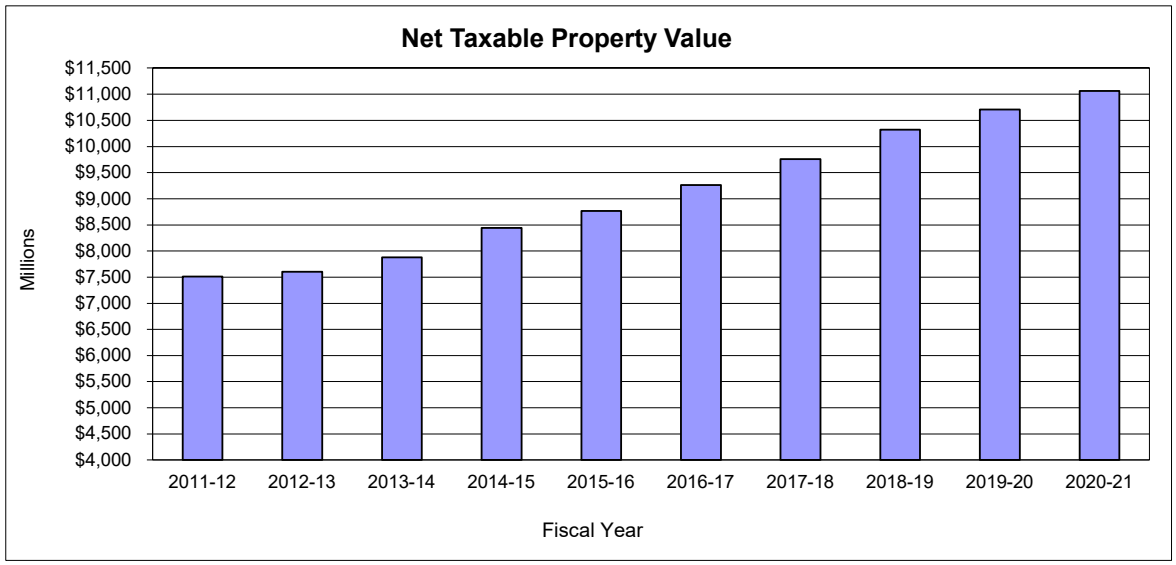
[3] *Total Levy Collections may exceed 100% due to prior years delinquent taxes and delinquent tax penalties collected.*

Source: Orange County Auditor/Controller.

CITY OF ALISO VIEJO

ASSESSED AND ESTIMATED ACTUAL VALUE OF TAXABLE PROPERTY
LAST TEN FISCAL YEARS

Fiscal Year	Secured Gross Value	Unsecured Gross Value	Nonunitary Utilities	Exemptions	Total	Percentage Increase	Total Direct Rate Applied
2011-12	$ 7,553,096,782	$ 310,902,332	$ -	$ 352,590,770	$ 7,511,408,344	-0.55%	0.02174
2012-13	7,643,633,146	290,218,553	-	328,327,398	7,605,524,301	1.25%	0.02167
2013-14	7,889,773,458	332,701,593	-	344,663,043	7,877,812,008	3.58%	0.02166
2014-15	8,449,701,616	320,520,081	-	329,481,251	8,440,740,446	7.15%	0.02165
2015-16	8,821,939,196	306,239,139	-	362,214,100	8,765,964,235	3.85%	0.02165
2016-17	9,298,401,724	305,313,282	-	341,610,276	9,262,104,730	5.66%	0.02165
2017-18	9,788,791,533	339,021,986	-	370,210,705	9,757,602,814	5.35%	0.02170
2018-19	10,497,372,155	280,375,081	-	457,069,555	10,320,677,681	5.77%	0.02163
2019-20	10,902,480,454	290,597,292	-	486,424,453	10,706,653,293	3.74%	0.02165
2020-21	11,227,375,357	340,871,059	-	504,713,951	11,063,532,465	3.33%	0.02168



Source: The HDL Companies

CITY OF ALISO VIEJO

DIRECT AND OVERLAPPING PROPERTY TAX RATES
(RATE PER $100 OF ASSESSED VALUE)
LAST TEN FISCAL YEARS

	Fiscal Years									
	2011-12	**2012-13**	**2013-14**	**2014-15**	**2015-16**	**2016-17**	**2017-18**	**2018-19**	**2019-20**	**2020-21**
City Direct Rates										
City's Share of 1% Levy per Prop 13[1]	0.02134	0.02134	0.02134	0.02134	0.02134	0.02134	0.02134	0.02134	0.02134	0.02134
Total City Direct Rate [2]	0.02174	0.02167	0.02166	0.02165	0.02165	0.02165	0.02170	0.02163	0.02165	0.02168
Overlapping Rates										
Basic Levy[3]	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000	1.00000
Capistrano Union	0.01101	0.01171	0.00972	0.00900	0.00845	0.00843	0.00800	0.00786	0.00745	0.00756
Laguna Beach Unified	0.01601	0.01694	0.01567	0.01461	0.01396	0.01371	0.01287	0.01285	0.01266	0.01012
Saddleback Valley Unified	0.03163	0.03265	0.03207	0.00350	0.03008	0.02688	0.02365	0.02392	0.02295	0.02336
Moulton Niguel Water District	0.12315	0.13840	0.12977	0.08600	0.09041	0.00815	0.00000	0.00000	0.00000	0.00000
Metropolitan Water District	0.00370	0.00350	0.00350	0.02806	0.00350	0.00350	0.00350	0.00350	0.00350	0.00350
Total Overlapping Rates[4]	1.1855	1.20320	1.19073	1.14117	1.14640	1.06067	1.04802	1.04813	1.04656	1.04454
Total Direct & Overlapping Tax Rates	1.20724	1.22487	1.21239	1.16282	1.16805	1.08232	1.06972	1.06976	1.06821	1.06622

[1] City's Share of 1% Levy is based on the City's share of the general fund tax rate area with the largest net taxable value within the city. ERAF general fund tax shifts may not be included in tax ratio figues.

[2] Total Direct Rate is the weighted average of all individual direct rates applied to by the government preparing the statistical section information and excludes revenues derived from aircraft. Beginning in 2013/14 the Total Direct Rate no longer includes revenue generated from the former redevelopment tax rate areas. Challenges to recognized enforceable obligations are assumed to have been resolved during 2012/13. For the purposes of this report, residual revenue is assumed to be distributed to the City in the same proportions as general fund revenue.

[3] In 1978, California voters passed Proposition 13 which set the property tax rate at a 1.00% fixed amount. This 1.00% is shared by all taxing agencies for which the subject property resides within. In addition to the 1.00% fixed amount, property owners are charged taxes as a percentage of assessed property values for the payment of any voter approved bonds.

[4] Overlapping rates are those of local and county governments that apply to property owners within the City. Not all overlapping rates apply to all city property owners.

Source: The HDL Companies, Orange County Assessor

CITY OF ALISO VIEJO

PRINCIPAL PROPERTY TAXPAYERS
JUNE 30, 2021 AND 9 YEARS AGO

2020-21

Taxpayer	Primary Use	Assessed Valuation	Percentage of Total Assessed Valuation
Moritz Associates LLC	Residential	$ 212,241,600	1.92%
Barcelona LLC	Residential	186,772,607	1.69%
Enterprise Office Owner	Commercial	163,342,800	1.48%
Vantis Multifamily LLC	Residential	156,294,000	1.41%
Microventon, Inc	Commercial	140,118,491	1.27%
City Lights-Aliso Viejo LLC	Residential	124,639,832	1.13%
Summit Office LLC	Commercial	118,866,728	1.07%
Trust Polaris LLC	Commercial	91,204,089	0.82%
Sequoia Equities	Residential	88,901,816	0.80%
PLC 3 LP	Residential	86,975,050	0.79%
Top Ten Totals		$ 1,369,357,013	12.38%

2011-12

Taxpayer	Primary Use	Assessed Valuation	Percentage of Total Assessed Valuation
City Lights-Aliso Viejo LLC	Residential	105,248,809	1.41%
Mortiz Associates LLC	Residential	104,816,741	1.40%
RREEF America REIT II Corporation	Commercial	92,155,000	1.23%
Barcelona LLC	Residential	90,328,073	1.21%
Sequoia Equities-Alicante	Residential	$ 73,782,270	0.99%
Qlogic Corporation	Commerical	71,681,406	0.96%
Sequoia Equities-Alize	Residential	70,400,000	0.94%
Pacific Life Insurance Company	Commerical	67,235,995	0.90%
OC SD Holdings LLC	Commerical	64,232,687	0.86%
Aliso-Holly Oaks Partners LP	Residential	60,050,295	0.80%
Top Ten Totals		$ 799,931,276	10.70%

Source: The HDL Companies
Orange County Assessor

CITY OF ALISO VIEJO

RATIOS OF NET DIRECT GENERAL OBLIGATION DEBT TO ASSESSED VALUE AND NET GENERAL OBLIGATION DEBT PER CAPITA
LAST TEN FISCAL YEARS

Fiscal Year	Net Direct General Obligation Debt	Assessed Value	Percentage of General Obligation Debt to Assessed Value	Population	Percentage of Personal Income	Net General Obligation Debt per Capita
2011-12	$ 7,490,000	$ 7,511,408,344	0.100%	48,988	0.37%	$ 152.89
2012-13	7,335,000	7,605,524,301	0.096%	49,477	0.35%	148.25
2013-14	-	7,877,812,008	0.000%	49,951	-	-
2014-15	-	8,440,740,446	0.000%	50,509	-	-
2015-16	-	8,765,964,235	0.000%	50,509	-	-
2016-17	-	9,262,104,730	0.000%	50,312	-	-
2017-18	-	9,757,602,814	0.000%	51,950	-	-
2018-19**	-	10,320,677,681	0.000%	51,372	-	-
2019-20	-	10,706,653,293	0.000%	50,044	-	-
2020-21	-	11,063,532,465	0.000%			

Ratios to Assessed Valuation:	
Total Overlapping Tax and Assessment Debt	0.27%
Total Direct Debt	**0.11%**
Gross Combined Total Debt	0.59%
Net Combined Total Debt	0.59%

*** Subsequent Event: On August 13, 2019 the City issued $12,250,000 of tax-exempt Certificates of Participation to provide financing for the construction of the Aliso Viejo Ranch. This debt will be refelected in the FY 2019-20 financial report.*

Source: California Municipal Statistics, Inc
HDL Coren & Cone

CITY OF ALISO VIEJO

COMPUTATION OF DIRECT AND OVERLAPPING BONDED DEBT
JUNE 30, 2021

2020-2021 Assessed Valuations	$ 11,063,532,465		
OVERLAPPING TAX AND ASSESSMENT DEBT:	Total Debt 6/30/21	% Applicable (1)	Debt 6/30/21
Saddleback Valley Unified School District	$ 99,864,969	0.491%	$ 490,337
City of Aliso Viejo Community Facilities Disctrict No. 2005-01	28,950,000	100.000%	28,950,000
TOTAL OVERLAPPING TAX AND ASSESSMENT DEBT			29,924,454
OVERLAPPING GENERAL FUND DEBT:			
Orange County General Fund Obligations	208,914,523	1.687%	3,524,388
Orange County Pension Obligation Bonds	116,492,175	1.687%	1,965,223
Orange County Board of Education Certificates of Participation	12,929,994	1.687%	218,129
Capistrano Unified School District Certificates of Participation	25,160,002	10.573%	2,660,167
Moulton-Niguel Water District Certificates of Participation	55,179,999	26.733%	14,751,269
TOTAL NET DIRECT OVERLAPPING GENERAL FUND DEBT			23,119,176
TOTAL NET OVERLAPPING DEBT			**53,043,630**
DIRECT GENERAL FUND DEBT:			
City of Aliso Viejo**	12,020,000	100.000%	12,020,000
TOTAL DIRECT DEBT			**12,020,000**
GROSS COMBINED TOTAL DEBT			65,063,630 (2)
NET COMBINED TOTAL DEBT			**$65,063,630**

(1) Percentage of overlapping agency's assesed valuation located within boundries of the city.
(2) Excludes tax and revenue anticipation notes, enterprise revenue, mortage revenue and non-bonded capital lease obligations.

Ratios to Assessed Valuation:	
Total Overlapping Tax and Assessment Debt	0.27%
Total Direct Debt	**0.11%**
Gross Combined Total Debt	0.59%
Net Combined Total Debt	0.59%

*** Subsequent Event: On August 13, 2019 the City issued $12,250,000 of tax-exempt Certificates of Participation to provide financing for the construction of the Aliso Viejo Ranch. This debt will be refelected in the FY 2019-20 financial report.*

Source: California Municipal Statistics, Inc

CITY OF ALISO VIEJO

LEGAL DEBT MARGIN
LAST TEN FISCAL YEARS

Fiscal Years	Legal Debt Margin
2011-12	$ 281,677,813
2012-13	277,872,161
2013-14	296,030,537
2014-15	316,527,767
2015-16	328,567,264
2016-17	347,328,927
2017-18	365,910,106
2018-19	387,025,413
2019-20	388,081,390
2020-21	402,862,467

Computation Of Legal Debt Margin for Fiscal Year 2020/21

Assessed Valuations:	
Assessed Value	$ 11,568,246,416
Add Back: Exempt Property	(504,713,951)
Total Assessed Value	$ 11,063,532,465
Legal Debt Margin:	
Debt limitations-3.75% of Total Assessed Value*	$ 414,882,467
Amount of Debt Applicable to Limit**	12,020,000
Legal Debt Margin	$ 402,862,467

Note: The general laws of the State of California for muncipalities provide for a legal debt limit of 15% of grossed assessed valuation. However, this provision was enacted when assessed valuation was established based on 25% of market value. Effective with fiscal year 1981-82, taxable property is assessed at 100% of market value. Although the debt limit provision has not been amended by the State since this change, the percentage has been proportionately modified to 3.75% for the purpose of this calculation for consistency with the original intent of the State's debt limit.

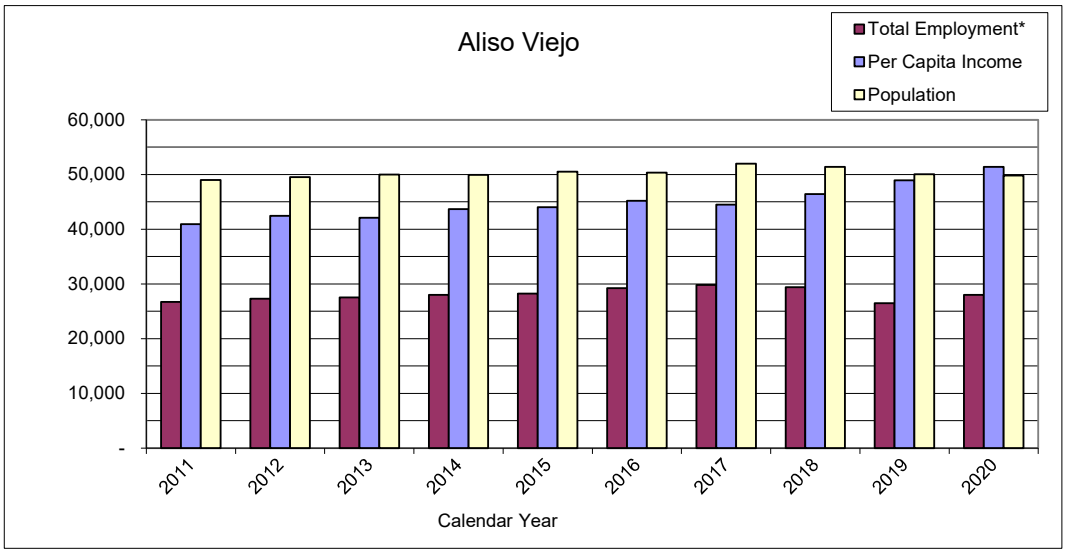
*** Subsequent Event: On August 13, 2019 the City issued $12,250,000 of tax-exempt Certificates of Participation to provide financing for the construction of the Aliso Viejo Ranch. This debt will be refelected in the FY 2019-20 financial report.*

Source: City Finance Department
The HDL Companies

CITY OF ALISO VIEJO

DEMOGRAPHIC AND ECONOMIC STATISTICS
LAST TEN CALENDAR YEARS

Calendar Year	Population	Total Income	Per Capita Income	Total Employment*	Employment Growth Rate*	Unemployment Rate*
2011	48,988	$ 2,002,825,392	$ 40,884	26,700	2.30%	6.50%
2012	49,477	2,100,001,788	$ 42,444	27,300	2.25%	5.50%
2013	49,951	2,100,839,000	$ 42,058	27,500	0.73%	4.50%
2014	49,939	2,181,535,000	$ 43,684	28,000	1.82%	3.60%
2015	50,509	2,223,991,000	$ 44,032	28,200	0.71%	3.10%
2016	50,312	2,274,460,000	$ 45,207	29,200	3.55%	2.80%
2017	51,950	2,311,366,000	$ 44,492	29,800	2.05%	2.60%
2018	51,372	2,385,153,000	$ 46,429	29,400	-1.34%	2.80%
2019	50,044	2,447,088,000	$ 48,899	26,500	-9.86%	7.80%
2020	49,813	2,559,352,000	$ 51,379	28,000	5.66%	7.50%



** Calendar year unemployment data uses December year-over-year averages.*

Source: California Department of Finance, California Employment Development Department, The HDL Companies

CITY OF ALISO VIEJO

PRINCIPAL EMPLOYERS
JUNE 20, 2021 AND 9 YEARS AGO

2021

Employer	Number of Employees	Percent of Total Employment
United Parcel Service	1000	4.04%
Pacific Life	811	3.28%
Capistrano Unified School District	679	2.75%
Microvention	650	2.63%
Fluor	630	2.55%
Quest Software	600	2.43%
Renaissance ClubSport	259	1.05%
Pepsi Beverages Company	215	0.87%
Smith Micro Software	200	0.81%
Target	170	0.69%
Total Top Employers	**5,214**	**21.08%**
Total Employees in City	**24,735**	

2012

Employer	Number of Employees	Percent of Total Employment
United Parcel Service	1,000	5.67%
Pacific Life Insurance	811	4.59%
Capistrano Unified School District	679	3.85%
Fluor Corporation	630	3.57%
Quest Software	600	3.40%
Qlogic	490	2.78%
Renaissance-Aliso Viejo	259	1.47%
Pepsi Bottling Group Inc	215	1.22%
Smith Micro Software Inc	200	1.13%
Merit Property Management	199	1.13%
Buy.com Inc	185	1.05%
Lennar Corporation	175	0.99%
Target	170	0.96%
Bausch & Lomb	160	0.91%
Ambry Genetics Corp	156	0.88%
The Covington	153	0.87%
Lensx Lasers	150	0.85%
Lowe's	130	0.74%
Total Top Employers	**6,362**	**21.08%**
Total Employees in City	**17,650**	

Source: City Finance Department

CITY OF ALISO VIEJO

OPERATING INDICATORS BY FUNCTION
LAST TEN FISCAL YEARS

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Public Safety:										
Part I Crimes	455	458	340	308	395	440	438	488	460	415
Public Works:										
Streets Resurfaced	27	42	63	53	38	29	1	57	1	103
Building Permits Issued	1103	1328	1486	2093	2455	2129	2225	1711	1754	1755
Plan Checks Performed	185	218	185	219	275	205	184	197	234	309
Community Services***:										
Recreation										
Contract Classes	-	-	-	-	-	-	145	452	999	283
Contract Class Participants	-	-	-	-	-	-	443	1559	2239	1599
Events										
City Events	8	8	8	8	7	7	16	26	8	9
City Sponsored Events	6	6	6	6	6	7	26	27	5	2
Senior Programs										
Senior Mobility Program Rides	-	-	-	-	1796	2141	2419	2102	2340	0
Finance										
Accounts Payable										
AP Line Items Entered	3231	3647	3344	3745	4041	4368	4454	4791	4964	4855
Invoices Processed	2222	2412	2309	2560	2852	3012	3069	3271	3216	3166
Payments Processed	1648	1712	1715	2148	2220	2257	2284	2474	2330	2338
Payroll										
Payroll Checks Issued	483	490	524	547	622	627	635	748	834	912

***The Community Services department was restructured in FY 2017-18

Source: City Public Works Department, Community Services Department, Orange County Sheriff's

CITY OF ALISO VIEJO

FULL-TIME AND PART-TIME CITY EMPLOYEES BY FUNCTION
LAST TEN FISCAL YEARS

Function	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
General Government [1]	8	8	9	9	10	10	10	10	11.3	12.9
Public Safety	Police Services are contracted through the Orange County Sheriff Department									
Public Works**	-	-	-	-	1	1	1	2	3	3
Community Services***	-	-	-	-	-	-	-	5.5	7.30	12.1
Community Development	7	7	7	7.4	7.4	7.4	7.4	5.0	7.3	5.5
Total	15.0	15.0	16.0	16.4	18.4	18.4	18.4	22.5	28.9	33.5

[1] *Attorney Services were contracted through Best, Best, & Krieger LLP and are not included.*

** Full Time Equivalent*

**Public Works Engineering and Building & Safety were contracted through Charles Abbott and Associates

*** Community Services Department was restructured in FY 17-18

Source: City Finance Department

CITY OF ALISO VIEJO

CAPITAL ASSETS STATISTICS BY FUNCTION
LAST TEN FISCAL YEARS

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
General Government										
City Hall	1	1	1	1	1	1	1	1	1	1
City Owned Property	4	4	4	4	4	4	4	4	4	4
Public Works:										
Streets (Miles)	73	73	73	73	73	73	73	73	73	73
Street Lights **	1263	1263	1299	1410	1410	1410	1410	1411	1407	1407
Traffic Signals **	42	42	42	47	47	47	47	47	48	48
Parks & Recreation:										
Parks ***	2	2	2	2	2	2	2	2	2	2
Community Facilities	2	2	2	2	2	2	2	2	2	2

*** The City leases 1,230 of the streetlights and shares 3 of the traffic signals with neighboring cities.*
**** Aliso Viejo Community Association independently owns and manages 21 parks in Aliso Viejo.*

Source: City Public Works Department

CITY OF ALISO VIEJO

SCHEDULE OF INSURANCE
JUNE 30, 2021

Type of Coverage	Limits/Deductibles	Insurer	Policy period
General and Automobile Liability:			
General Liability, Automobile Liability, Bodily Injury, Property Damage, Personal Injury.	$50,000,000 limit per occurrence, $50,000,000 annual aggregate.	Self Insured Program/ California Joint Powers Insurance Authority.	07/01/20 - 07/01/21
Pollution & Remediation Legal Liability:			
Scheduled property, streets, storm drains, approved underground tanks & non-owned disposal sites.	CJPIA Limit $50,000,000 for 3 years. $10,000,000 per member. Self insured retention $50,000 per occurrence.	Self Insured Program/ California Joint Powers Insurance Authority.	07/01/20 - 07/01/21
Property:			
All-Risk, including buildings, contents, garaged vehicles, contractor's equipment, fine arts, rental income and other miscellaneous extensions of coverage.	Limit $500,000,000 per occurrence Coverage is written at replacement cost.	Self Insured Program/ California Joint Powers Insurance Authority.	07/01/20 - 07/01/21
Crime:			
Public Employee Blanket Fidelity Bond-			
Faithful Performance Bond Coverage 'O'	$1,000,000 limit per member, deductible of $2,500 per occurrence	Alliant Insurance Services, Inc.	07/01/20 - 07/01/21
Depositor's Forgery Coverage 'B'	$1,000,000 limit per member, deductible of $2,500 per occurrence	Alliant Insurance Services, Inc.	07/01/20 - 07/01/21
Crime- Money & Securities Coverage 'C'	$1,000,000 limit per member, deductible of $2,500 per occurrence	Alliant Insurance Services, Inc.	07/01/20 - 07/01/21
Computer Fraud Coverage 'F'	$1,000,000 limit per member, deductible of $2,500 per occurrence	Alliant Insurance Services, Inc.	07/01/20 - 07/01/21
Worker's Compensation:			
Work related injury/illness claims for temporary and permanent disability.	California Statutory Benefits $10,000,000 per occurrence,	Self Insured Program/ California Joint Powers Insurance Authority.	07/01/20 - 07/01/21
Special Events:			
Tenants/Users for Property damage/bodily injury	$1,000,000 per occurrence, $1,000,000 aggregate per event. $5,000 medical expense limit.	Alliant Insurance Services, Inc.	07/01/20 - 07/01/21

Source: City Finance Department

CITY OF ALISO VIEJO

MISCELLANEOUS STATISTICAL INFORMATION
JUNE 30, 2021

Date of Incorporation	July 01, 2001
Form of Government	Council-Manager
Area	7 Square miles
Miles of Streets	72.1 miles
Miles of Sidewalks	147 miles
Employees	33.5
Public Safety	
Police Department	Contracted with the Orange County Sheriff's Department
Fire Department	Contracted with the Orange County Fire Authority
Recreation & Culture:	
Parks - Community & Neighborhood	23
Park Acreage (developed)	260 Acres
Education:	
Elementary Schools (K-6)	4
Middle Schools (6-8)	2
High Schools (9-12)	1
Charter Schools	1
Private Schools	4
Universities	1

*Source: State of California, Department of Finance

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Paul Espinoza, Interim Administrative Services Director and Scott C. Smith, City Attorney

SUBJECT: RESOLUTION APPROVING THE ISSUANCE BY THE CALIFORNIA MUNICIPAL FINANCE AUTHORITY OF THE PORTION OF REVENUE BONDS THE PROCEEDS OF WHICH ARE TO BE LOANED TO QCF/I, INC., A 501(c)(3) NONPROFIT HEALTHCARE ORGANIZATION, AND USED TO ACQUIRE THE EXISTING FACILITY LOCATED AT 200 FREEDOM LANE, ALISO, VIEJO, CALIFORNIA; AND APPROVING CERTAIN OTHER MATTERS RELATING THERETO

Recommended Action:

Adopt a Resolution approving the issuance by the California Municipal Finance Authority of the portion of revenue bonds the proceeds of which are to be loaned to QCF/I, Inc., a 501(c)(3) nonprofit healthcare organization, and used to acquire the existing facility located at 200 Freedom Lane, Aliso, Viejo, California; and approving certain other matters relating thereto.

Fiscal Impact:

There will be no direct costs incurred by the City. Indirect costs incurred include staff time and attorney costs. California Municipal Finance Authority ("CMFA") through its issuance activities, shares a portion of the issuance fees it receives with its member. If the bonds are issued, the City will receive a portion of the fee paid to the issuer of the bonds to offset any staff or attorney costs incurred to coordinate the City Council approval.

Background:

QCF/I, Inc., a 501(c)(3) nonprofit healthcare organization ("QCF"), has requested that the California Municipal Finance Authority (the "Authority") participate in the issuance of one or more series of revenue bonds (the "Bonds"), not more than $325,000,000 of which is allocable to the Aliso Viejo Hospital Project described below, the proceeds of which will be loaned to QCF in connection with QCF's acquisition, construction, expansion, rehabilitation, remodeling, renovation, and/or equipping of several hospital facilities, including the existing Aliso Ridge Behavioral Health and to fund reserves,

interest on the Bonds and costs of issuing the Bonds (the portion of the Bonds allocable to the acquisition by QCF of Aliso Ridge Behavioral Health and related facilities and other related purposes is referred to as the "Aliso Viejo Hospital Project").

Solely for purposes of Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), and Section 4 of the Joint Exercise of Powers Agreement Relating to the California Municipal Finance Authority, dated as of January 1, 2004 (the "Agreement"), among certain local agencies, including the City, and for no other purpose, the City Council has been requested by the Authority to approve the Aliso Viejo Hospital Project and the issuance by the Authority of the portion of the Bonds allocable to the Aliso Viejo Hospital Project.

QCF will own and operate the Aliso Viejo Hospital Project either directly or through a separate single-member limited liability company or companies. In all events, QCF will be the true beneficial party of interest of the Aliso Viejo Hospital Project because it will be the sole member of each such limited liability company, each of which is a disregarded entity for federal tax purposes.

Discussion:

In order to satisfy the requirements of Section 147(f) of the Code, a telephonic public hearing was held on January 5, 2022 relating to the Borrower and the proposed tax-exempt financing. No comments from the public were made at the public hearing.

Adoption of the attached resolution by the City Council would satisfy the requirements of Section 147(f) of the Code and Section 4 of the Agreement. The City shall have no obligation whatsoever to pay any principal, interest, fees or any other costs associated with the Authority's issuance of the Bonds for the financing of the Aliso Viejo Hospital Project or for any other purpose.

The adoption of this Resolution shall not obligate the City or any department thereof to (i) provide any financing for the Aliso Viejo Hospital Project; (ii) approve any application or request for or take any other action in connection with any planning appraisal, permit or other action necessary for the acquisition, improvement, rehabilitation or operation of the Aliso Viejo Hospital Project; or (iii) make any contribution or advance any funds whatsoever to the Authority.

Attachment:

1. Resolution

RESOLUTION NO. 2022-_____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ALISO VIEJO APPROVING THE ISSUANCE BY THE CALIFORNIA MUNICIPAL FINANCE AUTHORITY OF THE PORTION OF REVENUE BONDS THE PROCEEDS OF WHICH ARE TO BE LOANED TO QCF/I, INC., A 501(c)(3) NONPROFIT HEALTHCARE ORGANIZATION, AND USED TO ACQUIRE THE EXISTING FACILITY LOCATED AT 200 FREEDOM LANE, ALISO, VIEJO, CALIFORNIA; AND APPROVING CERTAIN OTHER MATTERS RELATING THERETO

WHEREAS, Aliso Ridge Behavioral Health is an acute psychiatric hospital located in the City of Aliso Viejo (the "City"); and

WHEREAS, QCF/I, Inc., a 501(c)(3) nonprofit healthcare organization ("QCF"), has requested that the California Municipal Finance Authority (the "Authority") participate in the issuance of one or more series of revenue bonds (the "Bonds"), not more than $325,000,000 of which is allocable to the Aliso Viejo Hospital Project described below, the proceeds of which will be loaned to QCF in connection with QCF's acquisition, construction, expansion, rehabilitation, remodeling, renovation, and/or equipping of several hospital facilities, including the existing Aliso Ridge Behavioral Health and to fund reserves, interest on the Bonds and costs of issuing the Bonds (the portion of the Bonds allocable to the acquisition by QCF of Aliso Ridge Behavioral Health and related facilities and other related purposes is referred to as the "Aliso Viejo Hospital Project"); and

WHEREAS, pursuant to Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), the Authority has, following notice duly given, held a toll-free telephonic public hearing on January 5, 2022 regarding the issuance of the Bonds allocable to the Aliso Viejo Hospital Project; and

WHEREAS, solely for purposes of Section 147(f) of the Code and Section 4 of the Joint Exercise of Powers Agreement Relating to the California Municipal Finance Authority, dated as of January 1, 2004 (the "Agreement"), among certain local agencies, including the City, and for no other purpose, the City Council has been requested by the Authority to approve the Aliso Viejo Hospital Project and the issuance by the Authority of the portion of the Bonds allocable to the Aliso Viejo Hospital Project; and

WHEREAS, the City Council understands that its actions in approving this Resolution do not obligate the City in any manner for payment of the principal, interest, fees or any other costs associated with the issuance of the Bonds, and said City Council expressly conditions its approval of this Resolution on that understanding;

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

SECTION 1. Approval of the Bonds. The City Council hereby approves, solely for purposes of Section 147(f) of the Code and the Section 4 of the Agreement and for no other purpose, the Aliso Viejo Hospital Project and the issuance of the portion of the Bonds allocable to the Aliso Viejo Hospital Project.

SECTION 2. No Obligations. The City Council expressly conditions its approval of this Resolution on its understanding that the City shall have no obligation whatsoever to pay any principal, interest, fees or any other costs associated with the Authority's issuance of the Bonds for the financing of the Aliso Viejo Hospital Project or for any other purpose.

SECTION 3. No City Obligation. The adoption of this Resolution shall not obligate the City or any department thereof to (i) provide any financing for the Aliso Viejo Hospital Project; (ii) approve any application or request for or take any other action in connection with any planning appraisal, permit or other action necessary for the acquisition, improvement, rehabilitation or operation of the Aliso Viejo Hospital Project; or (iii) make any contribution or advance any funds whatsoever to the Authority.

SECTION 4. Copy to Authority. The Clerk shall forward a certified copy of this Resolution to the Authority in care of its counsel:

Ronald E. Lee, Esq.
Jones Hall, APLC
475 Sansome Street, Suite 1700
San Francisco, CA 94111

SECTION 5. Effective Date. This Resolution shall take effect upon adoption.

PASSED, APPROVED AND ADOPTED this 19th day of January, 2022.

Ross Chun
Mayor

APPROVED AS TO FORM:

Scott C. Smith
City Attorney

ATTEST:

Mitzi Ortiz, MMC
City Clerk

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Omar Dadabhoy, Community Development Director

SUBJECT: FIFTH AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT WITH KOSMONT & ASSOCIATES, INC. FOR ECONOMIC DEVELOPMENT CONSULTANT SERVICES

Recommended Action:

Approve and authorize the City Manager to execute a Fifth Amendment to the Professional Services Agreement with Kosmont & Associates, Inc. for economic development consultant services to increase the total compensation by an amount not to exceed $12,000 and extend the term of the agreement to June 30, 2022.

Fiscal Impact:

The Amendment provides for compensation not to exceed $12,000 for economic development consultant services for Fiscal Year 2021-22. The Consultant is paid based on actual hours performing services on an as-needed basis. Funds for this agreement amendment were accounted for in the FY 2021-22 budget.

Background:

Since 2015, the Consultant has provided economic development advisory services, including market and economic analysis and the preparation and implementation of business attraction and retention strategies to the City. Accordingly, Kosmont prepared marketing materials and conducted outreach to targeted businesses, property owners, developers, and brokers, and participation with industry groups in connection with opportunity sites identified within the City.

Most recently, Kosmont arranged and attended meetings with the City Council and Staff at the Innovating Commerce Serving Community RECon conference in Las Vegas.

Discussion:

Consultant activities include updating and refining the previously prepared Citywide and opportunity site marketing collateral and attendance/coordination of meetings and/or

other industry conferences as decided by City and Consultant. The Consultant will conduct outreach; facilitate local commercial real estate broker collaboration strategies/meetings, meetings with major landlords, arrangement of site tours, and/or other recruitment and business retention activities, as deemed appropriate by City and Consultant; and assist with the pursuit and execution of potential economic incentives, funding sources, and/or financing structures, as appropriate. Additionally, the Consultant is available to perform additional economic development and real estate services such as analysis of possible fiscal impacts and economic benefits and/or project proforma feasibility as requested by the City.

Attachments:

1. Agreement Amendment

2. Proposal

CITY OF ALISO VIEJO

FIFTH AMENDMENT TO
AGREEMENT FOR ECONOMIC DEVELOPMENT SERVICES

1. PARTIES AND DATE.

This Fifth Amendment to the Agreement for economic development services ("Fifth Amendment") is entered into on the____day of_____2022, by and between the City of Aliso Viejo (hereinafter referred to as the "City") and Kosmont & Associates, Inc. (hereinafter referred to as the "CONSULTANT"). City and CONSULTANT are sometimes collectively referred to herein as the "Parties."

2. RECITALS.

2.1 Agreement. The Parties entered into that certain Agreement for economic development services dated May 21, 2015 ("Agreement").

2.2 First Amendment. The Parties entered into a First Amendment dated June 1, 2016, to update the scope of services to be provided by the Consultant; provide compensation to Consultant for such additional services; and extend the term provided in Section 3.1.2 of the Agreement.

2.3 Second Amendment. The Parties entered into a Second Amendment dated August 16, 2017, to further update the scope of services to be provided by the Consultant; provide compensation to Consultant for such additional services; and extend the term provided in Section 3.1.2 of the Agreement.

2.4 Third Amendment. The Parties entered into a Third Amendment dated January 16, 2019, to further update the scope of services to be provided by the Consultant provide compensation to Consultant for such additional services; and extend the term to June 30, 2020.

2.5 Fourth Amendment. The Parties entered into a Fourth Amendment in order to further update the scope of services to be provided by the Consultant provide compensation to Consultant for such additional services; and extend the term provide in Section 3.1.2 of the Agreement.

2.6 Fifth Amendment. The Parties now desire to amend the Agreement in order to further update the scope of services to be provided by the Consultant provide compensation to Consultant for such additional services; and extend the term provide in Section 3.1.2 of the Agreement.

3. TERMS.

3.1 Pursuant to Section 3.1.2 of the Agreement is hereby amended to extend the term of the agreement to June 30, 2022. The City Manager shall have the unilateral option, at its sole discretion, to renew this agreement for no more than two additional one-year terms.

3.2 Scope of Services. The Agreement is hereby amended to include the scope of services set forth in Exhibit "A," attached hereto and incorporated herein by reference.

3.3 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Fifth Amendment at the rates set forth in Exhibit "B" attached hereto and incorporated herein by reference. The total compensation for the Services provided pursuant to this Fifth Amendment shall not exceed **twelve thousand dollars ($12,000)** without written approval of the City Manager. The total compensation for the Services provided pursuant to the original agreement and this Fifth Amendment shall not exceed **one hundred seventy-six thousand, five hundred dollars ($176,500)** without written approval of the City Manager. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Fifth Amendment at the rates set forth in Exhibit "B" attached hereto.

3.4 Declaration of Political Contributions. Prior to the City's approval of this Amendment, Consultant shall submit to City a statement in writing declaring any political contributions of money, in-kind services, or loan made to any member of the City Council within the previous twelve-month period by the Consultant and all of Consultant's employees, including any employee(s) that Consultant intends to assign to perform the Services described in this Agreement.

3.5 Remaining Provisions of Agreement. Except as otherwise specifically set forth in this Fifth Amendment, the remaining provisions of the Agreement shall remain in full force and effect

SIGNATURE PAGE FOR FIFTH AMENDMENT TO THE AGREEMENT FOR ECONOMIC DEVELOPMENT SERVICES BETWEEN THE CITY OF ALISO VIEJO AND KOSMONT & ASSOCIATES, INC.

IN WITNESS WHEREOF, the parties have executed this First Amendment to Agreement on this ____ day of _____, 202__.

CITY OF ALISO VIEJO

Approved:

By:_____
David Doyle
City Manager

ATTEST:

By:_____
Mitzi Ortiz, MMC
City Clerk

APPROVED AS TO FORM:

_____
Best Best & Krieger LLP
City Attorney

APPROVED AS TO COMPLIANCE WITH BUDGET

By:_____
Paul Espinoza
Interim Director of Financial Services

KOSMONT & ASSOCIATES, INC.
DBA "KOSMONT COMPANIES"

By:_____
Kenneth K. Hira
President

By:_____
Larry J. Kosmont
Chairman & CEO

CITY OF ALISO VIEJO

DECLARATION OF POLITICAL CONTRIBUTIONS

Using the space provided below, please list any political contributions of money, in-kind services, or loans made to any member of the City Council within the last twelve (12) months by Consultant and all of Consultant's employees, including any employee(s) that applicant intends to assign to perform the work or services described in this Agreement:

NONE.

To the best of my knowledge, I declare under penalty of perjury that the foregoing is true and was executed at:

City/County/State	Date
Kosmont Companies	Print Name
Signature	

NOTE: THIS DECLARATION IS INCLUDED AS PART OF THE AGREEMENT AND MUST BE SIGNED AND ATTACHED HERETO.

CITY OF ALISO VIEJO

ACKNOWLEDGMENT OF RECEIPT OF FRAUD POLICY

I hereby acknowledge that I have received a copy of the City's "Fraud Prevention Policy" dated October 1, 2008. I understand that I am to promptly read its contents and distribute copies to employees assigned to perform Services for the City of Aliso Viejo.

To the extent that provisions of this policy conflict with previously issued policies or practices, whether or not such policies and practices were contained in written policies, this policy shall prevail.

Kosmont Companies	Ken K. Hira
Name of Business	Print Name
Signature	
Date	

EXHIBIT "A"
TO FIFTH AMENDMENT TO
KOSMONT AND ASSOCIATES

SCOPE OF SERVICES

The scope of services shall include the following economic-development programs and activities:

Task 1: Ongoing Economic Development Advisory

Kosmont will be available to work with the City on Economic Development initiatives such as business attraction, business retention and assisting local businesses.

Kosmont activities will include the update and refinement of previously prepared Citywide and opportunity site marketing collateral and attendance/coordination of meetings at Innovating Commerce Serving Communities ("ICSC") and/or other industry conferences as decided by City and Consultant. Kosmont will conduct outreach through phone and email communication, local commercial real estate broker collaboration strategies/meetings, meetings with major landlords, arrangement of site tours, and/or other recruitment and business retention activities, as deemed appropriate by City and Consultant. These ICSC and local activities and meetings will either be virtual or in person as appropriate.

Consultant will assist the City with pursuit and execution of potential economic incentives, funding sources, and/or financing structures in the context of potential public-private transactions, such as, but not limited to, special districts / enhanced infrastructure financing districts ("EIFD"), site- specific tax revenue pledges, (taxable/tax exempt) bonds or notes, lease or lease/leaseback financing, and/or grants, as appropriate.

Kosmont is available to perform additional economic development and real estate services such as analysis of possible fiscal impacts and economic benefits and/or project proforma feasibility as requested by the City.

EXHIBIT "B"
TO FIFTH AMENDMENT TO
AGREEMENT FOR ECONOMIC DEVELOPMENT SERVICES

COMPENSATION

Kosmont Companies
2021-2022 Public Agency Fee Schedule

Professional Services

Chairman & CEO	$375.00/hour
President	$345.00/hour
Senior Vice President/Senior Advisor	$305.00/hour
Vice President	$210.00/hour
Senior Project Analyst	$195.00/hour
Project Analyst/Project Research	$165.00/hour
Assistant Project Analyst/Assistant Project Manager	$125.00/hour
Project Promotion/Graphics/GIS Mapping Services	$ 95.00/hour
Clerical Support	$ 70.00/hour

- **Additional Expenses**

  In addition to professional services (labor fees):

  1) An **administrative fee** for in-house copy, fax, phone, postage costs, digital/technological support and related administrative expenses will be charged, which will be computed at four percent (4.0 %) of monthly Kosmont Companies professional service fees incurred; **plus**

  2) **Out-of-pocket expenditures,** such as travel and mileage, professional printing, and delivery charges for messenger and overnight packages will be charged at cost.

  3) If Kosmont retains **Third Party Vendor(s)** for Client (with Client's advance approval), fees and cost will be billed to Client at 1.1X (times) fees and costs.

  4) Consultant's **attendance or participation at any public meeting,** whether such participation is in person, digital, video and/or telephonic *(e.g., City Council, Planning Commission, Public Agency Board, other)* requested by Client and are beyond those specifically identified in the Scope of Work will be billed at the professional services (hourly) fees as shown on this Attachment A.

- **Charges for Court/Deposition/Expert Witness-Related Appearances**

  Court-related (non-preparation) activities, such as court appearances, depositions, mediation, arbitration, dispute resolution and other expert witness activities, will be charged at a court rate of 1.5 times scheduled rates, with a 4-hour minimum.

Rates shall remain in effect until June 30, 2022.

Memorandum DRAFT

To: Omar Dadabhoy, Community Development Director, City of Aliso Viejo

From: Ken K. Hira, President, Kosmont Companies
Fernando Sanchez, Vice President, Kosmont Companies

Date: November 22, 2021

Subject: **Work Plan for Continued Econ. Dev. Advisory Services FY 2021-2022 - DRAFT**

I. BACKGROUND

Kosmont Companies ("Kosmont" or "Consultant") was originally retained in June 2015 by the City of Aliso Viejo ("City" or "Client") to provide economic development advisory services, including market and economic analysis and the preparation and implementation of business attraction and retention strategies. Accordingly, Kosmont has prepared marketing material and conducted outreach to targeted businesses, property owners, developers, and brokers, and participation with industry groups in connection with opportunity sites identified within the City. The City has retained Kosmont to provide continued economic development advisory services for the last six years.

As requested by the City, Kosmont proposes the following Work Plan and Budget Authorization to assist with continued economic development advisory services in FY 2021-2022. This Work Plan serves as an Agreement when executed and retuned by Client to Kosmont.

II. WORK PLAN

Approach to Work Plan Scope of Services: The prospective assignment and consulting services that Kosmont will provide will be of a relatively limited scope and duration, and advisory in nature. Kosmont will be making recommendations only, which advise the City and jurisdictions, including its elected officials, appointed officials and staff, which they can accept or reject. None of Kosmont's staff will act in a capacity as an elected official, nor appointed official, nor as staff, nor as serving in a "designated" position.

Task 1: Ongoing Economic Development Advisory
Kosmont will be available to work with the City on economic development initiatives, such as business attraction, business retention, and assisting local businesses.

Kosmont activities will include the update and refinement of previously prepared Citywide and opportunity site market collateral and attendance/coordination of meetings at Innovating Commerce Serving Communities (formerly International Council of Shopping Centers) ("ICSC") and/or other industry conferences as decided by City and Consultant. Kosmont will conduct outreach through phone and email communication, coordinate roundtable discussions between

City staff and business executives, and schedule meetings and tours with local commercial real estate brokers, major landlords, and other major prospective businesses/tenants (e.g. research and development firms).

Task 2: Aliso Viejo Town Center Advisory Services
At the City's request, Kosmont will be available to provide advisory and implementation services related to the proposed revitalization plan for the Aliso Viejo Town Center, including, but not limited to the following:

a) Pro forma evaluation / financial feasibility analysis for potential development
b) Project fiscal impact and economic benefit analysis
c) Financial sources and uses analysis and public-private (P3) transaction structuring
d) Pursuit and execution of potential economic incentives, funding sources, and/or financing structures in the context of potential public-private transactions, such as Development Opportunity Reserve (D.O.R.)®, special districts (e.g., parking districts, business improvement districts, enhanced infrastructure financing districts ["EIFD"]), site specific tax revenue pledges, and/or other economic development tools
e) Transaction/development negotiations, opportunity site evaluations, and other advisory tasks, as may be needed

Task 3: Meetings
Kosmont will host one (1) virtual (via the Zoom teleconference platform) or in person meeting each quarter to review and discuss progress.

III. BUDGET FY 2021-2022

The compensation for Tasks 1 through 3 is $30,000 for professional services (hourly) fees as shown on Attachment A. Budget may be increased by City request at any point in time.

Kosmont is appreciative of the opportunity to continue to work with the City. Thank you.

[signature page follows]

ATTACHMENT A

Kosmont Companies
2021-2022 Public Agency Fee Schedule

Professional Services

Chairman & CEO	$375.00/hour
President	$345.00/hour
Senior Vice President/Senior Advisor	$305.00/hour
Vice President	$210.00/hour
Senior Project Analyst	$195.00/hour
Project Analyst/Project Research	$165.00/hour
Assistant Project Analyst/Assistant Project Manager	$125.00/hour
Project Promotion/Graphics/GIS Mapping Services	$ 95.00/hour
Clerical Support	$ 70.00/hour

- **Additional Expenses**

  In addition to professional services (labor fees):

  1) An **administrative fee** for in-house copy, fax, phone, postage costs, digital/technological support and related administrative expenses will be charged, which will be computed at four percent (4.0 %) of monthly Kosmont Companies professional service fees incurred; **plus**
  2) **Out-of-pocket expenditures,** such as travel and mileage, professional printing, and delivery charges for messenger and overnight packages will be charged at cost.
  3) If Kosmont retains **Third Party Vendor(s)** for Client (with Client's advance approval), fees and cost will be billed to Client at 1.1X (times) fees and costs.
  4) Consultant's **attendance or participation at any public meeting,** whether such participation is in person, digital, video and/or telephonic *(e.g., City Council, Planning Commission, Public Agency Board, other)* requested by Client and are beyond those specifically identified in the Scope of Work will be billed at the professional services (hourly) fees as shown on this Attachment A.

- **Charges for Court/Deposition/Expert Witness-Related Appearances**

  Court-related (non-preparation) activities, such as court appearances, depositions, mediation, arbitration, dispute resolution and other expert witness activities, will be charged at a court rate of 1.5 times scheduled rates, with a 4-hour minimum.

Rates shall remain in effect until June 30, 2022.

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Omar Dadabhoy, Director of Community Development

SUBJECT: FIRST AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT WITH MIKE LINARES, INC. FOR COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) PROGRAM ADMINISTRATION FOR FY 2021-2022

Recommended Action:

Approve and authorize the City Manager to execute the First Amendment to the Professional Services Agreement with Mike Linares, Inc. for Community Development Block Program ("CDBG") Program administration for FY 2021-22.

Fiscal Impact:

The City of Aliso Viejo will receive $213,835 in CDBG funds for Fiscal Year 2021-22 from U.S. Department of Housing and Urban Development ("HUD"). The CDBG program allows a maximum of 20 percent of the annual grant to be used for program administrative costs, including City staff and consultant time. Accordingly, for FY 2021-22 a maximum of $42,700 of the $213,835 may be allocated to program administration. The Consultant is paid based on actual hours performing services. Services are paid from the General Fund and reimbursed by HUD. The amendment would increase the total compensation under the agreement by $25,000. Funds for this agreement amendment were accounted for in the FY 2021-22 budget.

Background:

The City Council approved the original agreement with Mike Linares, Inc. ("Consultant") on May 17, 2017, for CDBG consultant services for a four-year term, commencing July 1, 2017, with the ability to extend for one additional year at the City Manager's discretion.

Discussion:

In 2017, the Consultant assisted the City with the transition from being a Participating Community under the County of Orange CDBG Program to an Entitlement City that undertakes its own program administration responsibilities through the preparation of the necessary documentation needed to becoming an entitlement city.

The Consultant prepared a Consolidated Plan to establish a multi-year strategy for the use of CDBG funds to address community needs. The adopted Consolidated Plan covers July 1, 2018, through June 30, 2023, and identifies an array of goals and activities that can be implement over the five-year period. Additionally, the Consultant prepares each fiscal year's Annual Action Plan, which establishes a framework for that specific year's CDBG expenditure plan. The Consultant also provides guidance to City staff, prepares necessary environmental documents for each year's projects, monitors project activities and expenditures, and serves as one of the primary contacts for HUD.

This first amendment implements the City Manager's ability to authorize a one-year extension to the agreement and increases total compensation by $25,000. No changes are proposed to the scope of services and all other provision of the original agreement, except as otherwise specifically noted in the first amendment, remain in effect.

Prior to the completion of this five-year agreement, a Request for Proposals will be prepared and disseminated for CDBG consultant services. Staff anticipates presenting a new agreement for approval to the City Council in June of 2022.

Attachment:

1. Agreement Amendment

CITY OF ALISO VIEJO

FIRST AMENDMENT TO COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) ADMINISTRATIVE SERVICES AGREEMENT

1. PARTIES AND DATE.

This First Amendment to the Agreement for **Community Development Block Grant Administrative Services** ("First Amendment") is entered into on the ____ day of _____, 202_, by and between the City of Aliso Viejo (hereinafter referred to as the "City") and **MIKE LINARES, INC.** (hereinafter referred to as the "Consultant"). City and Consultant are sometimes collectively referred to herein as the "Parties."

2. RECITALS.

2.1 Agreement. The Parties entered into an agreement entitled **Community Development Block Grant Administrative Services** dated May 17, 2017 ("Agreement").

2.2 First Amendment. The Parties now desire to amend the Agreement in order to renew the Agreement for an additional one-year term and increase the total compensation under the Agreement by **Twenty-Five Thousand Dollars ($25,000)**.

3. TERMS.

3.1 Term. Pursuant to Section 3.1.2 of the Agreement, the City hereby exercises the option to renew the Agreement and extend the term of the Agreement for one year from July 1, 2021 to June 30, 2022, unless earlier terminated as provided in the Agreement.

3.2 Compensation. The total compensation for the Services provided pursuant to the Agreement and this First Amendment shall not exceed **TWENTY-FIVE THOUSAND DOLLARS**, for a total compensation of **ONE HUNDRED THOUSAND DOLLARS ($100,000)** without written approval of the City Manager.

3.3 Declaration of Political Contributions. Prior to the City's approval of this Amendment, Consultant shall submit to City a statement in writing declaring any political contributions of money, in-kind services, or loan made to any member of the City Council within the previous twelve-month period by the Consultant and all of their employees, including any employee(s) that Consultant intends to assign to perform the Services described in this First Amendment.

3.4 Continuing Effect of Agreement. Except as otherwise specifically set forth in this First Amendment, the remaining provisions of the Agreement shall remain in full force and effect. From and after the date of this First Amendment, whenever the term "Agreement" appears in the Agreement, it shall mean the Agreement as amended by this First Amendment.

SIGNATURE PAGE FOR FIRST AMENDMENT TO THE COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) ADMINISTRATIVE SERVICES AGREEMENT BETWEEN THE CITY OF ALISO VIEJO AND MIKE LINARES, INC.

IN WITNESS WHEREOF, the parties have executed this First Amendment to Agreement on this ____ day of _____, 202__.

CITY OF ALISO VIEJO

Approved:

By:_____
David Doyle
City Manager

ATTEST:

By:
Mitzi Ortiz, MMC
City Clerk

APPROVED AS TO FORM:

_____
Best Best & Krieger LLP
City Attorney

APPROVED AS TO COMPLIANCE WITH BUDGET

By_____

Director of Financial Services

MIKE LINARES, INC.

[If Corporation, TWO SIGNATURES, President OR Vice President AND Secretary OR Treasurer REQUIRED]

By:_____

Its: PRESIDENT

Printed Name: MIKE LINARES

By:_____

Its: SECRETARY

Printed Name: MIKE LINARES

CITY OF ALISO VIEJO

DECLARATION OF POLITICAL CONTRIBUTIONS

Using the space provided below, please list any political contributions of money, in-kind services, or loans made to any member of the City Council within the last twelve (12) months by Consultant and all of Consultant's employees, including any employee(s) that applicant intends to assign to perform the work or services described in this Agreement:

NONE

To the best of my knowledge, I declare under penalty of perjury that the foregoing is true and was executed at:

SAN CLEMENTE / ORANGE / CA
City/County/State

11/10/21
Date

MIKE LINARES INC
Name of Business

MIKE LINARES
Print Name

Signature

NOTE: THIS DECLARATION IS INCLUDED AS PART OF THE AGREEMENT AND MUST BE SIGNED AND ATTACHED HERETO.

CITY OF ALISO VIEJO

ACKNOWLEDGMENT OF RECEIPT OF FRAUD POLICY

I hereby acknowledge that I have received a copy of the City's "Fraud Prevention Policy" dated October 1, 2008. I understand that I am to promptly read its contents and distribute copies to employees assigned to perform Services for the City of Aliso Viejo.

To the extent that provisions of this policy conflict with previously issued policies or practices, whether or not such policies and practices were contained in written policies, this policy shall prevail.

MIKE LINARES INC. — Name of Business

MIKE LINARES — Print Name

Signature

11/14/21 — Date

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Omar Dadabhoy, Community Development Director

SUBJECT: THIRD AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT WITH BECKY CAHA, INDEPENDENT CONTRACTOR, FOR AFFORDABLE HOUSING IMPLEMENTATION SERVICES

Recommended Action:

Approve and authorize City Manager to execute a Third Amendment to the Professional Services Agreement with Becky Caha, independent contractor, to increase the amount of the existing agreement.

Fiscal Impact:

The amendment will increase the existing agreement by $15,000 for a cumulative amount not to exceed $65,000. This agreement amount will be paid out of the Community Development Department's Contractual Services account which has funds allocated for the specific purpose of administering affordable housing services in the City.

Background:

On May 17, 2017, the City entered into a three-year agreement with Becky Caha to provide affordable housing implementation services, for an amount not to exceed $25,000. On June 22, 2020, the parties amended the Agreement to extend the term of the Agreement to June 30, 2021. On August 10, 2020, the parties amended the Agreement to increase the total compensation by $25,000 for a cumulative amount of $50,000 and extend the term of the Agreement to June 30, 2022.

Discussion:

This Third Amendment will allow an increase in the total amount of the agreement by $15,000. Ms. Caha will continue to provide affordable housing services which include administering the resale and refinancing of affordable units, responding to inquiries from the general public regarding affordable housing opportunities in the City, verifying compliance of all affordable unit property owners via annual ownership recertification and follow up, assisting staff with the review of documentation provided by the developments

with affordable rental units, assisting staff in any required code enforcement action against individuals that do not comply with the applicable affordability restrictions and terms, and assisting staff with the provision of data pertinent to affordable housing based grants. Ms. Caha has also been instrumental in the City's recent acquisitions of affordable housing units.

Staff has been pleased with Ms. Caha's performance with the affordable housing implementation services and is respectfully requesting that the Council approve the amendment so that she may continue to provide these services.

As is the City's practice, prior to July 1, 2022, Staff will also conduct a new RFP for housing related services and present the agreement to the City Council prior to the expiration of this Third Agreement.

Attachments:

1. Agreement Amendment

2. Scope of Services

CITY OF ALISO VIEJO

THIRD AMENDMENT TO
AFFORDABLE HOUSING IMPLEMENTATION SERVICES

1. PARTIES AND DATE.

This Third Amendment to the Agreement for Affordable Housing Implementation Services ("Third Amendment") is entered into on the ____ day of _____, 202_, by and between the City of Aliso Viejo (hereinafter referred to as the "City") and Becky Caha (hereinafter referred to as the "Consultant"). City and Consultant are sometimes collectively referred to herein as the "Parties."

2. RECITALS.

2.1 Agreement. The Parties entered into an agreement entitled Affordable Housing Implementation Services dated May 17, 2017 ("Agreement").

2.2 First Amendment. On June 22, 2020, the Parties amended the Agreement to extend the term of the Agreement to June 30, 2021.

2.3 Second Amendment. On August 10, 2020, the Parties amended the Agreement to increase the total compensation under the Agreement by Twenty-Five Thousand Dollars ($25,000) for a cumulative amount not to exceed Fifty Thousand Dollars ($50,000) and extend the term of the Agreement to June 30, 2022.

2.4 Third Amendment. The Parties now desire to amend the Agreement in order to increase the total compensation under the Agreement by **Fifteen Thousand Dollars ($15,000)**.

3. TERMS.

3.1 Term. Pursuant to Section 3.1.2 of the Agreement, the term of the Agreement shall be through June 30, 2022, unless earlier terminated as provided in the Agreement.

3.2 Scope of Services. The Agreement is hereby amended to include the scope of services set forth in Exhibit "A," attached hereto and incorporated herein by reference.

3.3 Compensation. The total compensation for the Services provided pursuant to the original agreement and this Third Amendment shall not exceed **Sixty-Five Thousand Dollars ($65,000)** without written approval of the City Manager. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Third Amendment at the rates set forth in Exhibit "B" attached hereto and incorporated herein by reference.

3.4 Declaration of Political Contributions. Prior to the City's approval of this Amendment, Consultant shall submit to City a statement in writing declaring any political contributions of money, in-kind services, or loan made to any member of the City Council within the previous twelve-month period by the Consultant and all of their employees, including any

employee(s) that Consultant intends to assign to perform the Services described in this Third Amendment.

3.5 Continuing Effect of Agreement. Except as otherwise specifically set forth in this Third Amendment, the remaining provisions of the Agreement shall remain in full force and effect. From and after the date of this Third Amendment, whenever the term "Agreement" appears in the Agreement, it shall mean the Agreement as amended by this Third Amendment.

3.6 Adequate Consideration. The Parties hereto irrevocably stipulate and agree that they have each received adequate and independent consideration for the performance of the obligations they have undertaken pursuant to this Third Amendment.

3.7 Counterparts. This Third Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute but one and the same instrument.

SIGNATURE PAGE FOR THIRD AMENDMENT TO AFFORDABLE HOUSING IMPLEMENTATION SERVICES BETWEEN THE CITY OF ALISO VIEJO AND BECKY CAHA, INDEPENDENT CONTRACTOR

IN WITNESS WHEREOF, the parties have executed this Third Amendment to Agreement on this ____ day of _____, 202__.

CITY OF ALISO VIEJO

Approved:

By: _____
David Doyle
City Manager

BECKY CAHA, INDEPENDENT CONTRACTOR

By: Becky Caha
Name: Becky Caha
Title: Independent Contractor

ATTEST:

By: _____
Mitzi Ortiz, MMC
City Clerk

APPROVED AS TO FORM:

Best Best & Krieger LLP
City Attorney

APPROVED AS TO COMPLIANCE WITH BUDGET:

By: _____
Paul Espinoza
Interim Finance Director

CITY OF ALISO VIEJO

DECLARATION OF POLITICAL CONTRIBUTIONS

Using the space provided below, please list any political contributions of money, in-kind services, or loans made to any member of the City Council within the last twelve (12) months by Consultant and all of Consultant's employees, including any employee(s) that applicant intends to assign to perform the work or services described in this Agreement:

N/A

To the best of my knowledge, I declare under penalty of perjury that the foregoing is true and was executed at:

Huntington Beach / Orange / California — City/County/State

1/10/2022 — Date

Becky Caha, Owner — Name of Business

Becky Caha — Print Name

Becky Caha — Signature

NOTE: THIS DECLARATION IS INCLUDED AS PART OF THE AGREEMENT AND MUST BE SIGNED AND ATTACHED HERETO.

CITY OF ALISO VIEJO

ACKNOWLEDGMENT OF RECEIPT OF FRAUD POLICY

I hereby acknowledge that I have received a copy of the City's "Fraud Prevention Policy" dated October 1, 2008. I understand that I am to promptly read its contents and distribute copies to employees assigned to perform Services for the City of Aliso Viejo.

To the extent that provisions of this policy conflict with previously issued policies or practices, whether or not such policies and practices were contained in written policies, this policy shall prevail.

Becky Cahn, Owner
Name of Business

Becky Cahn
Print Name

Becky Cahn
Signature

1/10/2022
Date

EXHIBIT "A"
TO THIRD AMENDMENT TO
AFFORDABLE HOUSING IMPLEMENTATION SERVICES

SCOPE OF SERVICES

SCOPE OF SERVICES

For this engagement, I propose to provide "turn-key" staffing services wherein I would be available to handle some or all of the tasks identified in the Scope of Services as follows:

- Respond to inquiries from the general public regarding affordable housing opportunities in the City.

- Determine eligibility for prospective homebuyers purchasing deed-restricted affordable units to include the following components:
    - Affordable Housing Resale Restrictions;
    - Escrow Instructions; and
    - Payoff processing and reconveyance/release preparation.

- Coordinate with escrow and title on the resale of properties and the refinancing of affordable units.

- Review terms to determine eligibility to refinance first trust deed loans.

- Prepare subordination agreements as required for refinancing.

- Maintain eligibility income data and records for homebuyers purchasing deed-restricted affordable units.

- Verify compliance of all affordable unit property owners via annual ownership recertification and follow up.

- As necessary, assist City staff with the review of documentation provided by the developments with affordable rental units.

- As necessary, assist City staff in any required code enforcement action against individuals that do not comply with the applicable affordability restrictions and terms.

- As necessary, assist City staff with the provision of data pertinent to affordable housing based grants.

EXHIBIT "B"
TO THIRD AMENDMENT TO
AFFORDABLE HOUSING IMPLEMENTATION SERVICES

COMPENSATION

FEE QUOTE

As the individual who has been providing these services for the past 10 years I am well-versed in the City's requirements to be able to administer these activities in an accurate and timely manner. This knowledge will allow the City's housing program to move forward without lapse in coverage or time needed to bring someone up to speed on all required activities. The fees for anticipated services are as follows:

Eligibility Review	$325.00 per loan
Loan Document Preparation/Processing Fee	$400.00 per loan

Eligibility review fee will be due upon eligibility determination. The loan document preparation and processing fee will be due upon close of escrow.

Occupancy Monitoring

I will continue to provide the City with monitoring services for compliance of the requirements of this affordable housing program. I will be responsible for the annual monitoring of the occupancy of the affordable units to ensure that the units are owner occupied and no unauthorized transfer has taken place. If requested by City, an annual report will be prepared outlining the specifics of the annual monitoring endeavor, as well as outlining any remediation activities that will need to take place in order to ensure compliance with the occupancy requirements of this program.

It is my understanding that the City also has 20 studio and one-bedroom rental units in the Vantis development; along with 2 senior developments, Vintage Aliso and Liberty at Aliso currently under construction with a total of 398 rental units that will be affordable to households earning lower incomes. I am available to work with the City in the administration of these developments at whatever capacity may be needed, including, but not limited to, review of developments' annual reports, review of rents and tenant incomes, and any tenant qualification review required.

Contract Budget Amount

As outlined above, the eligibility review and loan processing will be billed on a fixed fee. Any other activities under the Scope of Work will be billed on a time and materials basis. My hourly billing rate is $125 / hour. It is anticipated that this **annual fee will not exceed $25,000**. My fee is based upon an estimate of the number of annual hours needed for each task. If the Scope of Services is substantially changed in the future, I will notify the City and request a fee adjustment. The annual fee will be subject to an annual inflationary adjustment in accordance with the published Consumer Price Index pertinent to Orange County.

I do not charge clients for travel or mileage, parking, standard telephone/fax expenses, general postage or incidental copies. However, I do charge for messenger services, overnight shipping/express mail costs and teleconferencing services. I also charge for copies of reports, documents, notices, and support material in excess of five (5) copies. These costs are charged back at the actual expense plus a 10% surcharge.

Invoices will be issued monthly and are payable upon receipt, unless otherwise agreed upon in advance. Invoices identify tasks completed to date, hours expended and the hourly rate.

SCOPE OF SERVICES

For this engagement, I propose to provide "turn-key" staffing services wherein I would be available to handle some or all of the tasks identified in the Scope of Services as follows:

- Respond to inquiries from the general public regarding affordable housing opportunities in the City.

- Determine eligibility for prospective homebuyers purchasing deed-restricted affordable units to include the following components:
    - Affordable Housing Resale Restrictions;
    - Escrow Instructions; and
    - Payoff processing and reconveyance/release preparation.

- Coordinate with escrow and title on the resale of properties and the refinancing of affordable units.

- Review terms to determine eligibility to refinance first trust deed loans.

- Prepare subordination agreements as required for refinancing.

- Maintain eligibility income data and records for homebuyers purchasing deed-restricted affordable units.

- Verify compliance of all affordable unit property owners via annual ownership recertification and follow up.

- As necessary, assist City staff with the review of documentation provided by the developments with affordable rental units.

- As necessary, assist City staff in any required code enforcement action against individuals that do not comply with the applicable affordability restrictions and terms.

- As necessary, assist City staff with the provision of data pertinent to affordable housing based grants.

FEE QUOTE

As the individual who has been providing these services for the past 10 years I am well-versed in the City's requirements to be able to administer these activities in an accurate and timely manner. This knowledge will allow the City's housing program to move forward without lapse in coverage or time needed to bring someone up to speed on all required activities. The fees for anticipated services are as follows:

Eligibility Review	$325.00 per loan
Loan Document Preparation/Processing Fee	$400.00 per loan

Eligibility review fee will be due upon eligibility determination. The loan document preparation and processing fee will be due upon close of escrow.

Occupancy Monitoring

I will continue to provide the City with monitoring services for compliance of the requirements of this affordable housing program. I will be responsible for the annual monitoring of the occupancy of the affordable units to ensure that the units are owner occupied and no unauthorized transfer has taken place. If requested by City, an annual report will be prepared outlining the specifics of the annual monitoring endeavor, as well as outlining any remediation activities that will need to take place in order to ensure compliance with the occupancy requirements of this program.

It is my understanding that the City also has 20 studio and one-bedroom rental units in the Vantis development; along with 2 senior developments, Vintage Aliso and Liberty at Aliso currently under construction with a total of 398 rental units that will be affordable to households earning lower incomes. I am available to work with the City in the administration of these developments at whatever capacity may be needed, including, but not limited to, review of developments' annual reports, review of rents and tenant incomes, and any tenant qualification review required.

Contract Budget Amount

As outlined above, the eligibility review and loan processing will be billed on a fixed fee. Any other activities under the Scope of Work will be billed on a time and materials basis. My hourly billing rate is $125 / hour. It is anticipated that this **annual fee will not exceed $25,000**. My fee is based upon an estimate of the number of annual hours needed for each task. If the Scope of Services is substantially changed in the future, I will notify the City and request a fee adjustment. The annual fee will be subject to an annual inflationary adjustment in accordance with the published Consumer Price Index pertinent to Orange County.

I do not charge clients for travel or mileage, parking, standard telephone/fax expenses, general postage or incidental copies. However, I do charge for messenger services, overnight shipping/express mail costs and teleconferencing services. I also charge for copies of reports, documents, notices, and support material in excess of five (5) copies. These costs are charged back at the actual expense plus a 10% surcharge.

Invoices will be issued monthly and are payable upon receipt, unless otherwise agreed upon in advance. Invoices identify tasks completed to date, hours expended and the hourly rate.

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Omar Dadabhoy, Community Development Director
Jennifer Lowe, Senior Planner

SUBJECT: PLANNING APPLICATION PA21-016 (SDP/AUP/EP) FOR A SITE DEVELOPMENT PERMIT TO DEMOLISH AN EXISTING BUILDING AND CONSTRUCT A NEW RESTAURANT WITH A DRIVE-THRU; AN ADMINISTRATIVE USE PERMIT FOR OUTDOOR DINING; AND AN EXCEPTION PERMIT FOR A PARKING DEFICIENCY BELOW 15% AT 26641 ALISO CREEK ROAD

Recommended Actions:

1. Open and conduct a public hearing;

2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Section 15302 (Replacement or Reconstruction); and

3. Adopt a Resolution making findings under the California Environmental Quality Act and approving Planning Application PA21-016 (SDP/AUP/EP) for a site development permit to demolish an existing building and construct a new restaurant with a drive-thru; an administrative use permit for outdoor dining; and an exception permit for a parking deficiency below 15% at 26641 Aliso Creek Road.

Fiscal Impact:

No fiscal impact will result from this report.

Background:

The existing restaurant building was approved in 1996 under Site Plan PA950206 by the County of Orange. The site plan approved 355,400 square foot retail/entertainment center 54.5 acres. Construction of the restaurant building for Romano's Macaroni Grill was completed in 1997. Due to the change in industry preferences and then further impaired by the pandemic, Romano's Macaroni Grill officially closed its operation in Aliso Viejo in 2020. The Applicant, Amy's Drive-Thru, is a restaurant establishment that offers organic, vegetarian versions of classic American fast food. The restaurant was started in 2015 by

the founders of Amy's Kitchen. There are three locations in Northern California including one at the San Francisco airport.

Discussion:

Site Development Permit – New Building & Site Enhancements

The Applicant proposes to demolish the existing 8,168 square foot building and develop a 4,558 square foot restaurant, 615 square foot outdoor dining area, and drive-thru ("Project"). Pursuant to the requirements established in Aliso Viejo Municipal Code ("AVMC") Section 15.74.020, the Project requires a site development permit to ensure that new development conforms to the development and design provisions of the AVMC, including but not limited to permitted uses, development standards, and supplemental regulations. The application for the SDP included review of architectural, landscape and related development plans.

The overall design is an agricultural/farmhouse mixed with modern and sustainable elements, which reflects Amy's Kitchen's commitment to organic foods and sustainability. With a highly visible location at the intersection of Aliso Creek Road and Enterprise, the Applicant includes several unique elements that add to the character of the development but also reflect the Amy's Kitchen branding and goals.

- *Living Roof*. The building includes a living roof, which will incorporate climate-appropriate plantings of varying colors, sizes, and textures. The roof provides an aesthetic and functional purpose. In addition to increasing the overall aesthetics of the site and adding a unique element to the building, the living roof increases the insulation value at the roof while reducing the energy required for interior climate control.

- *Water Tower*. The Project includes a water tower painted in colors reflected in Amy's branding scheme in the open space area located at the corner of Aliso Creek Road and Enterprise. The water tower would not be functional but would serve as an art feature at this intersection. Due to the highly trafficked nature of this intersection, the water tower feature adds to the overall aesthetic of the corner while highlighting a prominent corner of Aliso Viejo Town Center.

- *Carport*. A portion of the drive-thru is covered by a decorative carport that provides shade while adding an additional architectural feature to the site. The carport also adds vertical elements to break up the large views of parking lot.

- *Family Park*. The Family Park is adjacent to the water tower and provides some seating area. The park is not proposed to be used as dining space but intended to extend the green space and add additional pedestrian-level features to the site.

- *Landscaping*. Landscaping was designed to reflect the Applicant's agricultural roots and combine the natural and built environments The Project includes significant upgrades to the plant palette, irrigation, and increased square footage.

The Applicant is proposing to add accent colorful plantings and update the overall palette of the site. Landscaping extends vertically, onto the building through the incorporation of a living roof.

Administrative Use Permit – Outdoor Dining

Outdoor dining may be permitted as an accessory use subject to the provisions of AVMC Section 15.22.190 if an administrative use permit is approved in accordance with AVMC 15.74.040. The proposed 615 square foot outdoor dining area is accessory to the main dining area. To ensure there is minimal impact to the nearby residential neighborhoods, the outdoor dining area will be subject to the hours of operation, operational characteristics, and conditions of approval for the in-restaurant dining. Additionally, the attached Resolution includes conditions of approval that prohibit amplified sound without an approved exception permit by the Community Development Director.

Exception Permit – Parking

The parking required for the 5,173 square foot restaurant, parked at the shopping center rate of 1 space per 220 square feet of gross floor area, is 23 spaces. The parcel for the Project proposes 32 parking spaces onsite, meeting City parking requirements. However, all uses within Town Center share parking through a series of reciprocal agreements for parking, access, encroachments, and utilities; therefore, parking is evaluated on all uses within the shopping center. To add the drive-thru, 25 parking spaces will need to be removed. The table below provides a summary of the parking for the project in relation to Aliso Viejo Town Center.

ALISO VIEJO TOWN CENTER PARKING SUMMARY			
Parking Space Requirements			
Use	**Square Footage/ # Seats**	**Parking Requirement**	**Parking Spaces Required**
Shopping Center	310,408 s.f.	1:220 s.f.	1,411
Movie Theater	4,225 seats	1:3 seats	1,408
Total Number of Parking Spaces Required			**2,819**
Parking Space Inventory			
Existing Spaces in Aliso Viejo Town Center			2,429
Demolition - Spaces Removed			(25)
Total Number of Spaces Onsite			**2,404**
Total Number of Parking Spaces Required			**2,819**
Parking Deficiency/%			**415 / 14.7%**

While Amy's will meet its individual parking requirements onsite, Aliso Viejo Town Center has a current parking deficiency of 14.2% (404 parking spaces from the total number of spaces required) with the existing 8,168 square foot restaurant. Compared to the previous restaurant use, Amy's Drive-Thru has a reduced building footprint and is primarily a drive-thru establishment, with the Applicant estimating 60% of its patrons will be for the drive-thru. The proposed drive-thru provides a stacking area for 16 vehicles and 2 pull-ahead

spaces. A Traffic and Circulation Analysis prepared by Kimley-Horn and Associates determined the stacking area with the pull-ahead spaces would be adequate for the number of vehicles using the drive-thru under normal restaurant operations. Additionally, the Project site is located away from the higher density, multi-tenant areas of Town Center. Parking in this area is primarily used by the two single-tenant buildings. With the minimal increase in parking deficiency from 14.2% to 14.7% (difference of 11 parking spaces) and based on the described operations and Traffic and Circulation Analysis, the alternate parking standard will provide sufficient parking for the uses served. Pursuant to AVMC 15.38.120(B), a reduction in the required number of parking spaces of 15 percent or less shall require approval of an exception permit subject to the findings referenced in AVMC 15.74.070 and with evidence that the alternate parking standards will provide sufficient parking for the use(s) served.

During staff's research and analysis of the parking for the project, staff noted that several jurisdictions credit drive-thru vehicle stacking toward the parking space requirement since the drive-thru absorbs some of the parking demand for restaurants. Although the individual parcel is conforming to parking standards, the overall shopping center is considered deficient. AVMC Section 15.38.040 does not count vehicle stacking areas toward meeting the parking requirement; therefore, increasing the overall parking deficiency. Staff is in process of developing an update of the parking standards identified in AVMC 15.38. To ensure City parking requirements are appropriate and sufficient to meet with current demands in parking and traffic, staff will be proposing an adjustment in the parking requirement for drive-thrus, subject to City Council review and approval.

Traffic/Circulation Analysis

To avoid impacts to public rights-of-way and internal circulation patterns within the shopping center, staff required the Applicant to submit a Traffic and Circulation Analysis. The study evaluated three scenarios: Existing Conditions, Opening Year 2022, and Opening Year 2022 Plus Project. Furthermore, the study provided existing and future conditions of four intersections: Enterprise at Town Center, Enterprise at Project Driveway, Aliso Creek Road at Enterprise, and Aliso Creek Road at Project Driveway. Currently, all intersections are currently operating at a level of service consistent with the thresholds established by the Aliso Viejo General Plan. The project is estimated to generate 204 morning peak hour trips and 150 evening peak hour trips. After applying pass-by reductions, the development is projected to generate a net addition of 104 morning peak hour trips and 75 evening peak hour trips. Under Opening Year 2022 Conditions and Opening Year 2022 Plus Project Conditions, all study intersections would continue to operate at an acceptable Level of Service.

The transportation consultant determined the characteristics of the restaurant and drive-thru were similar to the Amy's Drive-Thru in Rohnert Park, California. Drive-thru queuing observations were prepared by TJKM and included in the analysis by Kimley Horn. The study reports that the maximum queue observed was 12 vehicles on a given weekday and 18 vehicles during the weekend. The proposed Aliso Viejo drive-thru lane would have enough stacking distance for 16 vehicles 2 additional vehicles in the "pull-ahead" spaces

near the pick-up window. Based on data provided by Amy's Drive Thru, their restaurants are experiencing a 60-40 split with 60% of patrons using the drive-thru and 40% entering the restaurant. The Applicant estimates the time from placing an order to receiving an order at the pick-up window is four to six minutes. If a customer is expected to be at the window longer than 45 seconds, they are asked to move to the pull-ahead spaces. Based on Institute of Transportation Engineers (ITE) queuing formulas, the analysis indicates that average queuing length to be approximately 6 vehicles with the probability of an 18-vehicle queue at 0.97%. Additionally, the study concludes the occurrence of the queue exceeding 18 vehicles is estimated at a low probability of 6% and of minimum duration. The drive-thru as proposed is expected to fully contain the vehicle queue 94% of the time. The attached resolution provides conditions that grant the City the ability to require modifications to the operations of the drive-thru or, potentially, modifications to the site in the event the vehicle stacking area become inadequate impact ingress, egress, and circulation.

Aliso Viejo Community Association

A portion of the project along Enterprise encroaches into an Aliso Viejo Community Association ("AVCA") landscape maintenance easement. Improvements in this area consist of landscaping, drive-thru menu board, and fencing. Applicant representatives have been working with AVCA to transfer responsibility of the area to the property owner of the Project site. The Applicant will be required to provide documents that show the transfer of responsibility prior to issuance of any permits for the project.

Environmental:

Staff recommends the City Council find the proposed project categorically exempt from the California Environmental Quality Act (CEQA) Guidelines, pursuant to Class 2 exemption – Replacement or Reconstruction (CEQA Section 15302) as it consists of the replacement or reconstruction of existing structures and facilities where the new structure will be located on the same site as the structure replaced and will have substantially the same purpose and capacity as the structure replaced, specifically "(b) replacement of a commercial structure with a new structure of substantially the same size, purpose, and capacity."

Public Notice:

On January 6, 2022, a public hearing notice was published in the Aliso Viejo News and mailed to all owners of real properties within 300 feet of the subject real property.

City Attorney:

The City Attorney has reviewed the staff report.

Attachments:

1. Resolution for Planning Application PA21-016 (SDP/AUP/EP)
2. Amy's Drive-Thru Project Description
3. Amy's Drive-Thru Project Plans
4. Kimley-Horn and Associates, Inc. CEQA Analysis
5. Kimley-Horn and Associates, Inc. Traffic Circulation Analysis
6. Presentation

RESOLUTION NO. 2022- ____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, CALIFORNIA, APPROVING PLANNING APPLICATION PLANNING APPLICATION PA21-016 (SDP/AUP/EP) FOR A SITE DEVELOPMENT PERMIT TO DEMOLISH AN EXISTING BUILDING AND CONSTRUCT A NEW RESTAURANT WITH A DRIVE-THRU; AN ADMINISTRATIVE USE PERMIT FOR OUTDOOR DINING; AND AN EXCEPTION PERMIT FOR A PARKING DEFICIENCY BELOW 15% AT 26641 ALISO CREEK ROAD AND MAKING FINDINGS UNDER CEQA

WHEREAS, on July 21, 2021, the Applicant, Golden Property Development on behalf of Amy's Drive-Thru, submitted Planning Application PA21-016 (SDP/AUP/EP) for a site development permit to demolish an existing building and construct a new restaurant with a drive-thru; an administrative use permit for outdoor dining; and an exception permit for a parking deficiency below 15% at 26641 Aliso Creek Road (Project);

WHEREAS, pursuant to Aliso Viejo Municipal Code (AVMC) Sections 15.74.020, the purpose of a site development permit is to ensure that new development conforms to the development and design provisions of the Zoning Code;

WHEREAS, pursuant to AVMC Section 15.74.040, an administrative use permit shall be required for individual approval or denial of land uses requiring such permits based on the low to moderate potential for adverse impacts on surrounding properties, residents, or businesses under the Zoning Code;

WHEREAS, pursuant to AVMC Section 15.74.070, an exception permit shall be required for provide for minor deviations from certain development standards set out in this code, including a reduction in the required number of parking spaces of 15 percent or less subject to the additional findings identified in AVMC Section 15.38.120(B)(1);

WHEREAS, pursuant to AVMC Section 15.70.050, at the discretion of the Community Development Director, applications for different types of actions may be combined and processed concurrently in one application with one fee deposit so long as all applicable processing requirements are satisfied;

WHEREAS, pursuant to AVMC 15.70.50(A), for a combined application requiring a public hearing is combined with one not requiring a public hearing, the combined application shall require a public hearing and the final decision on the combined application shall be made by the highest applicable decision-making authority pursuant to AVMC Section 15.70.030;

WHEREAS, pursuant to Title 14, California Code of Regulations, Section 15367, the City of Aliso Viejo ("City") is Lead Agency for purposes of the Project;

WHEREAS, the City has reviewed the proposed Project and has determined that it is Categorically Exempt from environmental review under the California Environmental Quality Act ("CEQA") pursuant to CEQA Guidelines Sections 15302 (Replacement or Reconstruction);

WHEREAS, the City has determined that none of the Exceptions to the Categorical Exemptions listed in Title 14, California Code of Regulations Section 15300.2 applies to the Project; and

WHEREAS, on January 19, 2022, the City Council held a duly noticed public hearing as prescribed by law and considered public testimony and evidence and recommendations presented by staff in the agenda report and oral presentation related to Planning Application PA21-016 (SDP/AUP/EP); and

WHEREAS, all other legal prerequisites to the adoption of this Resolution have occurred.

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, DOES HEREBY RESOLVE, DECLARE, DETERMINE AND ORDER AS FOLLOWS:

SECTION 1. Determination of Recitals. The City Council hereby finds and determines that all of the recitals set forth above are true and correct. The above recitals are hereby incorporated as substantive findings of this Resolution.

SECTION 2. Compliance with CEQA. The City Council finds the proposed project categorically exempt from the California Environmental Quality Act (CEQA) pursuant to Class 2 exemption – Replacement or Reconstruction (CEQA Section 15302) as it consists of the replacement or reconstruction of existing structures and facilities where the new structure will be located on the same site as the structure replaced and will have substantially the same purpose and capacity as the structure replaced, specifically "(b) replacement of a commercial structure with a new structure of substantially the same size, purpose, and capacity." Improvements associated with the project involve modifications and alterations to existing parking lot areas to accommodate a new drive-thru, outdoor dining, accessory structures, and landscape upgrades. Furthermore, the modified parking standards for the shopping center negligibly affect the total the amount of parking available. Therefore, the proposed project is exempt from CEQA pursuant to State CEQA Guidelines, section 15302.

To the extent the Class 2 categorical exemption applies to the proposed project, staff has determined that none of the exceptions to the application of the exemption apply under State CEQA Guidelines, § 15300.2. Specifically, the proposed project is not located in a particularly sensitive environment. Improvements will be installed on existing structures in urbanized/developed areas. The project would not result in a cumulative impact from successive projects of the same type in the same place, over time. The project site and surrounding area are designated for commercial uses. The project involves the redevelopment of a site within the existing Aliso Viejo Town Center

shopping center by demolishing an existing building and constructing a smaller building in its place. The proposed project is forecasted to generate approximately 1,956 daily trips, with 104 trips in the AM peak hour and 75 trips in the PM peak hour. The Traffic Circulation Analysis (Kimley-Horn, November 2021) concludes that all study area intersections would continue to operate at acceptable levels of service with the project. Because the proposed project can be classified as local-serving commercial and is less than 50,000 sf, a less than significant VMT impact would occur. No project-specific or cumulative traffic impacts would occur. The project is not located within an officially designated state scenic highway. Thus, the proposed project would not have an impact in this regard. Similarly, the building is not located on a site designated pursuant to Government Code section 65962.5 (Cal/EPA Hazardous Waste and Substances Site Lists). Finally, the proposed project does not involve any improvements, modifications, or other changes to a historical resource. Therefore, none of the exceptions listed in Title 14, California Code of Regulations, section 15300.2 applies. Thus, the categorical exemption outlined above remains applicable to the proposed project.

SECTION 3. Approval of Project and Findings for Site Development Permit. In accordance with AVMC 15.74.020(D), the City Council hereby approves Planning Application PA21-016 (SDP/AUP/EP) major exterior renovations to a property, subject to the conditions set forth in Exhibit "A" and project plans set forth in Exhibit "B", which exhibits are both attached hereto and incorporated herein by reference.

1. *Consistency with General Plan. The project is consistent with the General Plan and any applicable specific plan.*

   The Land Use Element of the General Plan designates the project site as Town Center Commercial ("TCC"). The TCC designation provides for a mixture of uses within the Aliso Viejo Town Center (Town Center), including community retail and commercial services and restaurants. Under the General Plan, the City is encouraged to "provide a diverse mix of land uses to meet the future needs of all residents and the business community" and Land Use Policy LU-1.2 "attract a broad range of additional retail, medical, and office uses providing employment at all income levels and making a positive contribution to the City's tax base". The Project includes demolishing a vacant restaurant building and construction of a new and smaller restaurant. Based on the description of the TCC land use designation and Land Use Policies and Goals as defined in the General Plan, the Project is consistent with the Aliso Viejo General Plan.

2. *Consistency with Zoning Code. The land use and associated development conform to the permitted use provisions and development standards of this Zoning Code and is consistent with this Code and any applicable specific plan.*

   The Zoning District for the subject property is Town Center Commercial ("CT"). The CT District is similar to the General Plan TCC land use designation as Aliso Viejo Town Center is a mixed-use center intended to function as the community's urban core, central business district and community shopping area. Examples of permitted

uses include community retail and commercial services, offices, theaters, art galleries and entertainment facilities, hotels/motels and restaurants, and recreation and community facilities. In addition to conformance with municipal and building code requirements, all site improvements are subject to development and operational standards established in then AVMC. As conditioned in Exhibit A, prior to issuance of a Certificate of Use and Occupancy, the Applicant shall be required to provide operational and security plans for review and approval by the Director.

As proposed, the Project meets the following Zoning Code development standards in the CT zoning district:

(a) The maximum structure height of 45 feet (45'-0") in the CT District. The tallest addition is the water tower feature, which has a proposed height of 28 feet 4 inches (28'-4");

(b) The minimum perimeter setback is 40 feet (40'-0") from Aliso Creek Road and 20 feet from Enterprise – all structures (trash enclosure, generator enclosure new building façade, vehicular gate arms, and shade structures) are not located within the setback areas;

(c) The minimum interior landscaping within parking areas of 2.5% will be met with 5.2% of landscape coverage in parking areas;

(d) The minimum interior landscaping within non-parking areas of 2.5% will be met with 51.6% of landscape coverage in non-parking areas;

(e) The minimum average boundary landscaping of 15 feet will be met with boundary landscaping depths of 20 feet along the perimeter of the project;

(f) The minimum drought tolerant landscaping of 50% will be met 95% of drought-tolerant landscaping;

(g) The screening of mechanical equipment, trash enclosure, and service yards conform to the requirements established in AVMC Chapter 15.62;

(h) Lighting and other security elements are consistent with the Crime Prevention through Environmental Design ("CPTED") requirements as established in Appendix A of AVMC Title 15; and

(i) The parking deficiency requires an exception permit for a reduction in the required number of parking spaces of 15 percent or less subject to the additional findings set forth in Section 5 of this Resolution.

3. *Compliance with CEQA. Processing and approval of the permit application are in compliance with the requirements of the California Environmental Quality Act.*

See Section 2 above. Based upon the whole of the record, including the staff report for this Resolution, as well as attachments to that staff report, the City Council hereby finds and determines that the proposed project is categorically exempt from the California Environmental Quality Act (CEQA) Guidelines, pursuant to Class 2 exemption – Replacement or Reconstruction (CEQA Section 15302) as it consists of the replacement or reconstruction of existing structures and facilities where the new structure will be located on the same site as the structure replaced and will have substantially the same purpose and capacity as the structure replaced, specifically "(b) replacement of a commercial structure with a new structure of substantially the same size, purpose, and capacity."

4. *Architectural Design. The architectural design of the project, including but not limited to the architectural style, scale, building mass, materials, colors, architectural details, roof style are compatible with surrounding development.*

   The overall architectural theme is agricultural/farmhouse with modern and sustainable elements. The main building is designed to resemble a modern farmhouse with its use of a gabled roof, wood siding, and outdoor patio. Working with the building form, screening elements, and orientation, the Applicant designed the Project to maximize thermal comfort and design preferences associated with diners. As a result, the scale of the proposed building is reduced from existing conditions to allow for a more expansive design that merges the built and natural environment with proposed landscaping upgrades, outdoor garden, and patio areas. Additionally, the living roof provides indoor climate control to the building while also further extending the open space into the built environment. The trash enclosure, service yard, and rooftop equipment were designed to create a cohesive theme throughout the site by coordinating and mimicking the color and materials of the main building. Colors chosen for the site highlight the modern farmhouse theme while representing the Amy's Drive-Thru branding. Since the site is highly visible at Aliso Creek Road and Enterprise and includes an open space area at the corner, the architectural details and design integrate the use of natural materials while providing a modern design to the 22-year-old shopping center.

5. *Site Design. The site design of the project, including but not limited to project entries, interior circulation, pedestrian and bicycle access, pedestrian amenities, screening of equipment and trash enclosures, exterior lighting, and other site design elements are compatible with surrounding development.*

   The orientation of the proposed building is designed to use existing utilities and take advantage of the views from various drives. The Project does not propose changes to number of vehicular entrances. The proposed drive-thru location was selected based on existing conditions of the shopping center regarding vehicle entrances and the locations of existing buildings and drive aisles. Additionally, the selected location allows for a design that accommodates a 16-vehicle queue and 2 pull-ahead stalls to avoid overflow into the main drive aisle. In conjunction with a traffic and circulation study prepared by a qualified planning and engineering firm, the site design will

facilitate adequate ingress, egress, and circulation in the parking lot. The Project includes modifications to the main parking lot areas to bring the property into conformance with accessibility and clean air/electric vehicle requirements. Bicycle parking will be located south of the front of the building. A portion of the passive open space area between the building and intersection of Aliso Creek Road and Enterprise will be enclosed with 42-inch (42") railing and activated with the installation of a water tower feature and family park area. This area will not be used for dining service but offer an extended green space for patrons. The open space area will include seating areas along the existing pedestrian walkways from the site to the public right-of-way. The Applicant proposes to install a 40-inch (40") cedar fence along the drive-thru to establish a boundary between the pedestrian and vehicle areas. The railing and drive-thru views will be screened by new trees and shrubs. The trash enclosure will be located within the parking lot area and constructed to satisfy all design and water quality requirement. All service areas and equipment will be adequately screened from view and exterior lighting is consistent with Appendix A: CPTED of AVMC Title 15, Zoning Code.

6. *Landscape Design. Project landscaping, including but not limited to the location, type, size, color, texture, and coverage of plant materials, has been designed so as to provide visual relief, complement buildings, visually emphasize prominent design elements and vistas, screen undesirable views, provide a harmonious transition between adjacent land uses and between development and open space, and provide an overall unifying influence to enhance the visual continuity of the project.*

Landscaping was designed to reflect the Applicant's agricultural roots and combine the natural and built environments. Square footage dedicated to landscaping is significantly increased throughout the project site in both parking and non-parking areas. The plant palette incorporates a variety of species classified as water efficient, ecologically appropriate, and aesthetically pleasing. The design also extends the landscaping vertically, onto the building through the incorporation of a living roof. The roof will include climate appropriate plants of a variety of color, size, and texture, adding a unique aesthetic to the building while also serving to increase the insulation value of the roof and reducing the among of energy required for interior climate control. The proposed plant palette will soften, complement, and emphasize prominent design elements, screen undesirable views, and provide an overall unifying influence to enhance the visual continuity of the project. The location, type, size, color, texture, and coverage of plant materials will be required to be designed to provide visual relief and complement the building and accessory structures. Additionally, the proposed landscaping visible from Aliso Creek Road and Enterprise are intended to provide a harmonious transition between adjacent land uses, providing an overall unifying influence, and enhance the visual continuity of the project.

SECTION 4. Approval of Project and Findings for an Administrative Use Permit for Outdoor Dining. In accordance with Section 15.74.040(C) of the AVMC, the City Council hereby approves the AUP for Planning Application PA21-016

(SDP/AUP/EP) subject to the conditions set forth in Exhibit "A," attached hereto and incorporated herein by reference.

1. *Consistency with General Plan. The land use is consistent with the General Plan and any applicable specific plan in that:*

   The proposed use is consistent with General Plan Goal LU-1: "Provide a diverse mix of land uses to meet the future needs of all residents and the business community." Within that goal, the following policies apply to the proposed use: General Plan Policy LU-1.1 – "Work to achieve a balance or surplus between the generation of public revenues and the cost of providing public facilities and services" and Policy LU-3.1 – "Promote development of revenue-generating land uses." The use is consistent within the TCC land use designation which is described as a designation with "retail stores, restaurants, lodging, community facilities, personal services, business services, and financial services of a citywide or regional nature," as the outdoor dining complements primary restaurant use and the proposed accessory service introduces and provides additional options to patrons.

2. *Consistency with Zoning Code. The land use and associated development conform to the permitted use provisions and development standards of the Zoning Code and is consistent with the Code and any applicable specific plan.*

   AVMC Section 15.22.190(A) states outdoor dining may be permitted as an accessory use subject to the provisions of this section if an administrative use permit is approved in accordance with AVMC 15.74.040 and additional findings listed in AVMC Section 15.22.190(C). The proposed 615 square foot outdoor dining area is accessory to the main restaurant building and accounts for only 12% of the use's total square footage. The outdoor dining area will be subject to operational requirements and limitations of the primary restaurant use.

3. *Compliance with CEQA. Processing and approval of the permit application are in compliance with the requirements of the California Environmental Quality Act.*

   See Section 2 above. The proposed project is categorically exempt from the California Environmental Quality Act (CEQA) Guidelines, pursuant to Class 2 exemption – Replacement or Reconstruction (CEQA Section 15302) as it consists of the replacement or reconstruction of existing structures and facilities where the new structure will be located on the same site as the structure replaced and will have substantially the same purpose and capacity as the structure replaced, specifically "(b) replacement of a commercial structure with a new structure of substantially the same size, purpose, and capacity."

4. *Surrounding Uses. Approval of the application will not create conditions materially detrimental to the public health, safety and general welfare or injurious to or incompatible with other properties or land uses in the vicinity.*

The site is located within an existing shopping center. The site is immediately surrounded to the south and west by other areas the shopping center with the Commons at Aliso Viejo Town Center to the north across Enterprise and are residential uses across Aliso Creek Road to the east. There is no indication the use will create conditions materially detrimental or injurious to the properties, improvements or land uses in the vicinity. Standard conditions of approval have been incorporated into Exhibit A that limits the outdoor dining area to the hours of operation and operational characteristics of the in-restaurant dining and prohibiting the use of amplified sound in outdoor areas.

5. *The proposed outdoor dining is accessory to the eating and drinking establishment.*

   The proposed outdoor dining is an accessory use to the main restaurant use at 26641 Aliso Creek Road. The outdoor dining area is only 615 square feet in comparison to the 4,558 square feet indoor restaurant area and accounts for only 12% of the use's total square footage.

6. *The accessory outdoor dining area will not result in the reduction of existing parking spaces below that required for the restaurant use.*

   The accessory outdoor dining area is located within areas that are currently within the existing building area. Portions of the outdoor dining area will encroach into existing parking spaces; however, the Project includes an exception permit for a reduction in parking to accommodate this reduction. Furthermore, the restaurant is primarily a drive-thru establishment with approximately 60 – 64% of patrons using the drive-thru over dining in. As a result, the demand for parking is reduced.

SECTION 5. Approval of Project and Findings for Exception Permit for an Modifications to the Required Number of Spaces. In accordance with Section 15.38.120(B)(1) of the AVMC, the City Council hereby approves the EP for Planning Application PA21-016 (SDP/AUP/EP) subject to the conditions set forth in Exhibit "A", attached hereto and incorporated herein by reference.

1. *Consistency with General Plan. The exception is consistent with the General Plan and any applicable specific plan.*

   The Land Use Element of the Aliso Viejo General Plan identifies Town Center as being located in the TCC land use area. The TCC land use designation provides for a variety of uses that serve the needs of nearby neighborhoods, including retail stores, service stations and restaurants. The Project is consistent with the General Plan as it would allow the Applicant to maximize its use of the site for its operations while providing a mix of land uses to meet the future needs of all residents and the business community (Land Use Goal LU-1). Furthermore, the EP could facilitate a broad range of uses that provide additional employment and make a positive contribution to the City tax base (Land Use Policy LU-1.2).

2. *Consistency with Zoning Code. Except for the deviation allowed under this permit, the land use and associated development conform to the permitted use provisions and development standards of this Zoning Code and is consistent with this Code and any applicable specific plan.*

   Town Center is characterized by a variety of uses (including retail, restaurant, personal services and office uses) that are permitted outright or with a use permit. Aliso Viejo Town Center currently has a parking deficiency of 14.2% (404 parking spaces from the total number of spaces required) with the existing 8,168 square foot restaurant area requiring 82 parking space. Compared to the previous restaurant use, Amy's Drive-Thru has a reduced dining area and is primarily a drive-thru establishment, with the Applicant estimating 60% of its patrons will be for the drive-thru. The proposed drive-thru provides a stacking area for 16 vehicles and 2 pull-ahead spaces. A Traffic and Circulation Analysis prepared by Kimley-Horn and Associates, a planning and engineering consulting firm, determined that the stacking area with the pull-ahead spaces would be adequate for the number of vehicles using the drive-thru under normal restaurant operations. AVMC Section 15.38.120(B)(1) allows for a reduction in the number of parking spaces of 15% or less if an exception permit is approved pursuant to Section 15.74.070. Additionally, a parking exception can be approved if alternative parking standards will provide sufficient parking for uses served and the alternate parking standards comply with the purpose and intent of Chapter 15.38. Except for this deviation, the proposed project is consistent with development standards in the AVMC.

3. *Compliance with CEQA. Processing and approval of the permit application are in compliance with the requirements of the California Environmental Quality Act.*

   See Section 2 above. The proposed project is categorically exempt from the California Environmental Quality Act (CEQA) Guidelines, pursuant to Class 2 exemption – Replacement or Reconstruction (CEQA Section 15302) as it consists of the replacement or reconstruction of existing structures and facilities where the new structure will be located on the same site as the structure replaced and will have substantially the same purpose and capacity as the structure replaced, specifically "(b) replacement of a commercial structure with a new structure of substantially the same size, purpose, and capacity."

4. *Surrounding Uses. Approval of the application will not create conditions materially detrimental to the public health, safety and general welfare or injurious to or incompatible with other properties or land uses in the vicinity.*

   The Project is a well-established commercial center characterized by retail, office, restaurant, personal services, and automotive uses. The current Project proposes a reduced dining area compared to the previous restaurant use and the primary operation as a drive-thru. Additionally, the traffic and circulation analysis concluded that over 60% of the operations would be drive-thru services; therefore, approval of

the EP will not create conditions material detrimental to the public health, safety, and general welfare or injurious or incompatible with other properties.

5. *Given the specific conditions of the site and the adjacent area, the alternate parking standards will provide sufficient parking for the use(s) served.*

   AVMC Section 15.38.040 requires 1 parking space for every 220 square feet of gross floor area for shopping centers. Based on existing square footages, Aliso Viejo Town Center requires 2,819 parking spaces; however, there are 2,404 parking spaces onsite. With the minimal increase in parking deficiency from 14.2% to 14.7% (difference of 11 parking spaces) and based on the described operations and Traffic and Circulation Analysis, the alternate parking standard will provide sufficient parking for the uses served. Due to the varying peak hours of operation for the uses within the shopping center, the primary nature of the restaurant as a drive-thru establishment, and information provided in the traffic and circulation analysis, there is sufficient parking in Town Center.

6. *The alternative parking standards complies with the purpose and intent of this chapter.*

   The purpose and intent of AVMC Chapter 15.38 is to provide for the demand of off-street parking generated by various land uses; ensure the health, safety and welfare of the public by ensuring safe access to homes and businesses; and provide for properly designed parking facilities with adequate numbers of parking spaces in order to reduce traffic congestion promote business and enhance public safety. Based on the parking regulations established in Chapter 15.38, each new tenant may be required to obtain an exception permit for parking. Off-street parking is required for all land uses in accordance with this chapter. These regulations are intended to: (1) provide for the demand for off-street parking generated by the various land uses in the city; (2) ensure the health, safety and welfare of the public by ensuring safe access to homes and businesses; and (3) provide for properly designed parking facilities with adequate numbers of parking spaces in order to reduce traffic congestion, promote business and enhance public safety. As described in the parking, sufficient parking is available for patrons of the proposed use.

SECTION 6. Filing of Notice of Exemption. The City Council hereby authorizes and directs staff to prepare, execute and file with the Orange County Clerk a Notice of Exemption for the proposed Project.

SECTION 7. Location of Documents. The administrative record for the Project is maintained at City Hall located at 12 Journey, Suite 100, Aliso Viejo, CA 92656. The custodian of records is the City Clerk.

PASSED, APPROVED AND ADOPTED this 19th day of January 2022.

_____
Ross Chun
Mayor

APPROVED AS TO FORM:

_____
Scott C. Smith
City Attorney

ATTEST:

_____
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 foregoing Resolution No. 2022-___ was duly passed and adopted by the City Council of the City of Aliso Viejo at their regular meeting held on the 19th day of January 2022, by the following roll call vote, to wit:

AYES:

NOES:

ABSENT:

_____
MITZI ORTIZ
CITY CLERK

(SEAL)

I hereby certify that the foregoing is the original of Resolution No. 2022-__ duly passed and adopted by the Aliso Viejo City Council at its regular meeting held January 19, 2022.

_____
MITZI ORTIZ
CITY CLERK

(SEAL)

EXHIBIT "A"

CONDITIONS OF APPROVAL

General Conditions

1. This approval is for Planning Application PA21-016 (SDP/AUP/EP) – a site development permit to demolish an existing building and construct a new restaurant with a drive-thru; an administrative use permit for outdoor dining; and an exception permit for a parking deficiency below 15% at 26641 Aliso Creek Road, Aliso Viejo, CA in accordance with all plans and exhibits as presented to and approved by the City Council on January 19, 2022.

2. The application is a plan for location and design of uses, structures, features, and materials submitted by this application and shown on the approved plans. Development shall be consistent with architectural design guidelines and all other development standards specified in the Municipal Code. Any relocation, alteration, modification, or addition to any use, structure, feature, or material, not specifically approved shall require an amendment to PA21-016 (SDP/AUP/EP) unless the Community Development Director determines the proposed change complies with the provisions and the spirit and intent of the original approval, and the action would have been the same for the amendment as for the approved project. The Director may approve a minor amendment without requiring a new public hearing and may modify conditions as needed to ensure consistency with standards and criteria established by the Municipal Code.

3. Failure to abide by and faithfully comply with any and all conditions attached to granting of this permit shall constitute grounds for revocation of said permit.

4. For the purpose of Planning Applications PA21-016 (SDP/AUP/EP) and as referenced in the conditions, "Owner/Developer" shall apply to Amy's Drive-Thru, business owner, business operator, and any and all future successors and assigns of the approved establishment.

5. The Owner/Developer, and Owner/Developer's successors, heirs, and assigns shall indemnify, protect, defend, and hold the City, and/or any of its officials (appointed or elected), officers, employees, agents, departments, agencies, and instrumentalities thereof, harmless from any and all claims, demands, lawsuits, writs of mandamus, and other actions and proceedings (whether legal, equitable, declaratory, conditional or adjudicatory in nature), and alternative dispute resolution procedures (including, but not limited to arbitrations, mediations, and other such procedures), judgments, orders, decisions, and monetary claims, including but not limited to fines, fees, penalties, expert witness fees, attorneys' fees, and other related costs and expenses (collectively 'Actions'), brought against the City, and/or any of its officials, officers, employees, agents, departments, agencies, and instrumentalities thereof, that challenge, attack, or seek to modify,

set aside, void, or annul, any action of, or any permit or approval issued by the City and/or any of its officials, officers, employees, agents, departments, agencies, and instrumentalities thereof (including actions approved by the voters of the City) for or concerning the project, whether such Actions are brought under the Ralph M. Brown Act, California Environmental Quality Act, the Planning and Zoning Law, the Subdivision Map Act, Community Redevelopment Law, Code of Civil Procedure Sections 1085 or 1094.5, or any other federal, state, or local constitution, statute, law, ordinance, charter, rule, regulation, or any decision of a court of competent jurisdiction. It is expressly agreed that the City shall have the right to approve, which approval will not be unreasonably withheld, the legal counsel providing the City's defense. City shall promptly notify the Applicant of any Action brought and City shall cooperate with applicant in the defense of the Action at applicant's absolute and sole cost.

6. The Owner/Developer and Owner/Developer's successors in interest shall be fully responsible for knowing and complying with all conditions of approval, including making known the conditions to City staff for future governmental permits or actions on the project site.

7. The Owner/Developer and Owner/Developer's successors in interest shall be responsible for payment of all applicable fees along with reimbursement for all City expense in ensuring compliance with these conditions. All fees and expenses shall be paid in full prior to a final inspection for commercial structures. Prior to issuance of the applicable City approvals or permits for commercial structures, the Owner/Developer shall be fully responsible for reimbursing the City of Aliso Viejo for all expenses incurred to process all requests for development review and to assure compliance with all conditions of approval.

8. Design, maintenance, and operation of the permit area and facilities thereon shall comply with all applicable regulations of the City, and all requirements and enactments of Federal, State, County, and City authorities, and all such requirements and enactments shall, by reference, become conditions of this permit whether or not they are listed as conditions.

9. The Owner/Developer shall obtain a temporary use permit for the temporary placement of a trailer or relocatable building or the temporary use of a permanent structure on an active construction site as a construction and/or watchman's office, and the establishment of a temporary materials and equipment storage yard subject to the requirements established in AVMC 15.22.170 prior to issuance of any permit.

10. In the event that the City is made aware of potential safety and security issues at the construction site during afterhours, the Community Development Director and Chief of Police Services may require additional security enhancements and operations may be required.

11. The Owner/Developer shall use combination locks at each gate of the Project site. Combinations for access at each gate shall be given to the City of Aliso Viejo, Orange County Sherriff's Department, and Orange County Fire Authority. Combinations to each lock shall not be changed without immediate notification (within one hour) to the agencies referenced. The Community Development Director or Director of Public Works may require modifications to the locations of the gates based on any queuing or traffic issues which may occur.

12. If any hazardous waste is encountered during construction of any portion of this project, all work shall be immediately stopped on that portion of the project, and the Orange County Health Care Agency (OCHCA), the Orange County Fire Authority (OCFA), the Orange County Sheriff's Department (OCSD), and the Director of Public Works shall be notified immediately. Work on that portion shall not continue until clearance has been issued by all of these agencies.

13. The Owner/Developer shall utilize prudent and reasonable measures to prevent unauthorized persons from entering the work site at any time and to protect the public from accidents and injury arising from the construction of the project.

14. All workers and visitors to the site must observe a 10-mile per hour speed limit in the construction area.

15. All portions of the project site shall be continuously maintained free of litter or debris during construction per SWPPP and CAL-OSHA requirements.

16. Landscape planting and replacements shall conform to the following minimum size and planting density standards:

    a. Trees.

        i. Minimum size: eight feet high (measured from the top of container) with at least 30 percent to be minimum 24-inch box size.

        ii. Maximum spacing in parkways, entry drives, street medians, parking lot planter strips, and project boundary strips: average 30 feet. Trees may be planted either in irregular clusters or at equal intervals provided the preceding average spacing is achieved.

    b. Shrubs.

        i. Minimum size: one gallon minimum with at least 30 percent to be five-gallon.

        ii. Maximum spacing: average 10 feet.

c. Vines. As required to augment groundcover and/or provide screening for retaining walls.

d. Groundcover. Hand-planted plugs with minimum density of one foot on center, or other density as approved by the director, or hydroseeding utilizing seed mixture approved by the director. Either of the preceding methods or a combination of the two shall be sufficient, in the director's judgment, to meet a goal of 100 percent slope coverage within one year of planting.

17. An agronomic soils report will need to be acquired and a copy of the soils test is to be included with the planting plans with construction document package.

18. Parking and on-site circulation requirements as shown on the approved plans shall be maintained at all times to the satisfaction of the Director of Public Works.

    a. All pavement markings and signage including parking spaces, directional designations, no parking designations and fire land designations shall be clearly defined and said signage and markings shall be maintained in good condition at all times.

    b. Parking site circulation and street surfaces shall be maintained in good condition at all times and shall be swept at least as frequently as public streets in Aliso Viejo.

    c. All areas of landscaping shall be permanently and continuously maintained by the property owner.

    The Project shall incorporate traffic calming measures into the design such as speed humps, signing and striping.

19. During construction activities, the Owner/Developer shall ensure the following standard measures are implemented to reduce short-term (construction) air emissions:

    a. Controlling fugitive dust by regular watering or other dust palliative measures to meet South Coast Air Quality Management District Rule 403 (Fugitive Dust).

    b. Maintaining equipment engines in proper tune.

    c. Phasing and scheduling construction activities to minimize project-related emissions.

d. Project compliance with Aliso Viejo General Plan Final EIR MM AQ-1 requiring a Dust Control Plan that specifies dust control measures to control fugitive dust emissions.

e. Compliance with South-Coast Air Quality Management District Rule 402 (Nuisance) to reduce odors from construction activities.

The Project shall ensure that during site preparation and grading operations, all contractors shall comply with all applicable measures listed in SCAQMD Rule 403 to control fugitive dust, including the application of water to all exposed surfaces a minimum of three times per day.

20. The Project shall use low VOC cleaning supplies.

21. Construction activities shall be limited to between the following hours: a) 8:00 a.m. and 6:00 p.m. Monday through Friday, and b) 9:00 a.m. to 6:00 p.m. Saturday. No construction work is to be done on Sundays or City-observed holidays. Construction personnel shall not enter the site prior to 7:00 a.m. on permitted construction days. Construction work on Saturdays will require payment of a premium for City inspection services and may be further restricted or prohibited should the City receive complaints from adjacent property owners.

22. Construction staging areas stall be located the furthest distance from existing residences.

23. The City will review construction vehicle and delivery activities and may recommend modifications if necessary.

24. Before commencement and construction, the Owner/Developer shall attend a pre-construction meeting with an OCFA inspector. Call OCFA Inspection Scheduling at (714) 573-6150 at least five days in advance to schedule a preconstruction meeting.

25. After installation of required fire access roadways and hydrants, the Owner/Developer shall receive clearance from COFA prior to bringing combustible building materials onsite. Call OCFA Inspection Scheduling (714) 573-6150 with Service Request

26. The Owner/Developer and its contractors shall ensure that either water-based or low-VOC coating with a VOC coating of 50 grams per liter (lower than SCAQMD Rule 1113) be utilized to apply the architectural coatings. In addition, the Project shall utilize transfer or spray equipment with high transfer efficiency. For example, a high volume, low pressure (HVLP) spray method coating application system operated at an air pressure between 0.1 and 10 pounds per square inch gauge (psig), with a 65 percent transfer efficiency. Manual transfer with brush or roller has 100 percent transfer efficiency.

27. The Project shall require the use of paints with VOC content of 10 g/L or lower.

28. Security cameras shall be installed per the satisfaction of the Director of Police Services. The security camera footage shall be kept for at least 30 days and available to the Orange County Sheriff Department within 24 hours if such usage is necessary.

29. The sale or service of alcohol is prohibited. The Owner/Developer must obtain an administrative use permit from the City of Aliso Viejo and appropriate alcohol license from the California Department of Beverage Control prior to dispensing any alcoholic beverages at the restaurant.

30. Live entertainment, including music or disc jockeys, and/or dancing as a primary or accessory use shall not be permitted without a separate use permit from the City.

31. The outdoor dining area shall be subject to the existing hours of operation, operational characteristics and conditions of any use permit applicable to the overall establishment.

32. Amplified live music shall not be permitted outdoors unless an exception permit is approved pursuant to AVMC 15.74.070. Unamplified live music may be permitted if included as part of the outdoor dining administrative use permit.

33. All doors and windows leading to the outdoor dining area shall remain closed while indoor amplified music or live entertainment is being played.

34. Fences, walls, roofs or similar barriers shall serve only to define the outdoor dining area and shall not constitute a permanent all-weather enclosure.

35. The outdoor dining area shall be limited to the area delineated in the approved plans and must not impact existing drainage gutter in parking lot. No tables and/or chairs shall be permitted in the area between the building and the outdoor dining area.

36. The property and outdoor dining area shall remain clear of any storage of merchandise, equipment, or materials at all times. Furthermore, proper procedures for cleaning this area and disposal of wash water, solid waste and hazardous chemicals shall be used. No hosing down is allowed.

37. The Owner/Developer shall ensure that pedestrian safety is maintained at all times. The Owner/Developer shall ensure that pedestrian crossings shall be adequately visible to motor vehicles through signage, lighting, and/or markings.

38. The Owner/Developer shall ensure that vehicles queuing at the drive-thru shall not block ingress, egress, or circulation of any drive aisle outside of the designated drive-thru lane. In the event vehicles are found to impede ingress, egress, or circulation or if there are adequate concerns for the safety of other vehicles or

pedestrians, the Community Development Director, City Engineer, or Chief of Police Services shall have the discretion to bring this permit back to consider additional improvements, conditions, and/or modification to operations to mitigate the impacts.

39. In the event of adverse impacts on the health, safety or welfare of the neighborhood or public, or receipt of substantiated complaints directly related to the Applicant's operations and/or alternative parking plan, the Community Development Director shall investigate and, if significant adverse impacts directly related to the Applicant's business are found to exist, the Director or Chief of Police shall have the discretion to bring this Permit back to consider additional improvements and protective measures, additional conditions, amended conditions, or permit revocation.

40. The facility shall operate at all times in a manner that will allow the quiet enjoyment of residents and tenants of surrounding properties. The Applicant shall institute whatever securing and operational measures are necessary to comply with this requirement. This shall include ensuring the operations do not generate negative impacts in regard to noise, odor, and views of the site. In the event that the City receives a substantiated complaint in regard to potential impacts generated from the Project site, the Director may require additional requirements to mitigate those impacts.

41. Signage for the property shall be reviewed separately and is not part of the approval of this Project. Prior to any sign installation, the Applicant shall submit a Sign Permit Application to the Community Development Director for approval and a permit shall be issued by the Building Official. All proposed signage for the building shall be submitted to the City and processed pursuant to AVMC 15.34 standards and/or any applicable planned sign program affecting the property. No advertising devices shall be permitted on or off the project site visible to the public.

42. This Resolution and Conditions of Approval shall be incorporated into building plans to all applicable reviewing agencies or authorities.

Conditions Required Prior to the Issuance of a Grading Permit or Approval of Infrastructure Plans

Building Department Conditions

No Conditions.

Fire Department Conditions

43. Prior to issuance of a Grading Permit, a fire master plan (service code PR145) shall be submitted and approved by OCFA.

Planning Department Conditions

44. Above ground obstructions (utility cabinets, mailboxes, etc.) are to be placed within right-of-way landscaping areas whenever possible and shall be screened subject to the approval of the Community Development Director. When above ground obstructions are to be placed within sidewalk, a minimum five (5) foot clear sidewalk width must be provided around the obstruction.

45. All backflow preventers, transformers, and other above-grade utilities shall be appropriately screened from public with walls and/or plantings, unless prohibited by another governing agency.

46. Roof-mounted mechanical equipment such as air conditioning, heating or ventilating units or ducting shall be screened from a horizontal line of sight. Such screening shall be architecturally consistent with the building and an integral part of the roof design so as not to appear as an architectural "afterthought." For flat roofs, an architecturally consistent screen enclosure behind the parapet wall may be used if it is made to appear as an integral part of the building. The ground-mounting of mechanical equipment, with appropriate wall or landscape screening, as an alternative to roof mounting is encouraged.

47. The trash enclosure shall be designed and constructed as follows:

    a. The enclosure shall be constructed on a concrete pad provided with a floor drain connection to the sanitary sewer system or other approved containment method to the satisfaction of the city engineer. Interior concrete or metal curbs shall be provided to prevent damage to the enclosure's walls from collisions with heavy containers.

    b. The enclosure shall be constructed on a concrete pad provided with a floor drain connection to the sanitary sewer system or other approved containment method to the satisfaction of the city engineer. Interior concrete or metal curbs shall be provided to prevent damage to the enclosure's walls from collisions with heavy containers.

    c. The enclosure shall be provided with a solid overhead cover integrated into the enclosure design and approved by the planning director and city engineer.

    d. Enclosures shall consist of a solid wall on three sides at least six feet in height and a solid self-latching gate on the fourth side at least five feet in height. Gates shall be metal or metal-framed, of heavy-duty construction sufficient to withstand hard usage and shall be attached to metal posts securely anchored into the ground. Gates shall be maintained in good working order and shall remain closed except when in use. Walls and gates shall be consistent with the colors and finishes of nearby buildings.

e. The use of plastic or corrugated metal for enclosure walls or overhead covers is prohibited.

48. The Owner/Developer shall obtain all necessary approvals from any applicable property owners' associations prior to issuance of any permit. Copies of written approval shall be submitted to the Department of Planning Services.

49. The Owner/Developer shall provide documentation that the property owner interest for the area of improvements in the dedicated easement for Aliso Viejo Community Association has been legally transferred to the property owner.

Police Services Department Conditions

No Conditions.

Public Works Department Conditions

50. Prior to issuance of a Grading Permit, a construction phase Solid Waste Management Plan shall be prepared and submitted to the Director of Public Works for review and approval. This plan shall include specific measures to reduce refuse generated by construction of the proposed project. The Owner/Developer, property Owner/Developer, or successor in interest shall prepare a waste management plan, which shows how construction materials will be recycled, consistent with the City of Aliso Viejo Waste Reduction Ordinance.

51. Prior to issuance of a Grading Permit, a Solid Waste Management Plan for continuous solid waste handling shall be submitted to the Director of Public Works for review and approval. This Plan shall assure compliance with AB 939, AB 1594 and AB 1826 provisions to maximize recovery and recycling of solid waste generated on-site including green waste and organics. The plan shall include provisions for storing and handling of solid waste, including location and design of solid waste storage areas. Each area shall conform to the City's Municipal Code and be designed and constructed in such a manner to be properly screened to prevent precipitation from entering waste containers and to assure water quality standards are maintained for any storm water which may enter a solid waste enclosure, and to provide adequate space for separation of wastes for recycling. The plan shall be reviewed by the City's franchise solid waste hauler and appropriately modified to assure effective operations.

    The Project shall require that the Solid Waste Management Plan reduces waste to landfills by a minimum of 75 percent

52. All existing and proposed utilities shall be placed under ground, where feasible and acceptable to the utility provider, as approved by the Director of Public Works.

53. The Owner/Developer and its contractors shall use their best efforts to protect in place all survey monuments during construction. Disturbed monuments shall be reestablished.

54. Prior to issuance of a Grading Permit, the Owner/Developer shall have a geotechnical report prepared to the satisfaction of the Director of Public Works and at a minimum, the geotechnical report shall address the following:

    a. The Owner/Developer or subsequent Owner/Developers shall contract with an Engineering Geologist and Geotechnical Engineer to quantify engineering properties of the on-site soil materials, to assess potential for weak soils or bedding layers which may affect cut or natural slopes, and to verify that grading planned within the project boundary will be remediated to result in an increase in landslide stability consistent with factors of safety approved by the city's consulting Geotechnical Engineers. This geotechnical study shall, as deemed necessary by the Director of Public Works and consulting City Geologist and Geotechnical Engineer, further assess slopes adjacent to existing residential development areas. Further assessment must also address stability and mitigation measures for slopes adjacent to residential areas, as well as potential off-site impacts along access streets. Findings and recommendations of the geotechnical assessment shall be incorporated into the final design for commercial and residential structures.

    b. The Owner/Developer will determine with subsequent geotechnical studies, the location of any landslide or unstable slope areas. Landslides and slope areas shall be removed and re-compacted during grading to the satisfaction of the Director of Public Works and the City's consulting Geotechnical Engineers. All cut and fill slopes, foundations and structures, shall be designed and constructed to comply with the California Building Code (CBC) and applicable City and County Grading Ordinances. Modification to these standards shall be permitted only with written concurrence of the Director of Public Works.

    c. An engineering geologist shall define final grading requirements for the site. All geological recommendations shall be reviewed and approved by the Director of Public Works. Foundation designs in areas where fault traces are identified that have been deemed inactive should address enhancing stability of buildings in the event minor movement occurs as a secondary effect of ground shaking.

    d. An engineering geologist shall study all unanticipated faults exposed during grading to detect any evidence of possible recent activity and submit the findings to the Director of Public Works for review. No structure shall be placed within 50 feet of any fault trace.

e. Prior to issuance of a grading permit, the Developer shall submit to the Director of Public Works for review and approval, a detailed Geotechnical Engineering Report certified by a California Registered Civil Engineer. The Geotechnical Engineering Report shall include an investigation with regard to liquefaction, expansive soils, and seismic safety. Also, the Report shall discuss contents of the soils as to presence or absence of any hazardous waste or other contaminants in the soils. Should additional geotechnical studies be generated or required as a result of the geotechnical investigation, additional plan check fees will be required. The Developer shall reimburse the City for all costs including the City's administrative fee for this review.

f. All recommendations included in the approved Geotechnical Engineering Report shall be implemented during project design, grading, and construction in accordance with the approved project. The Director of Public Works shall review all plans for conformance of grading plan-check the Developer's geotechnical engineer shall sign the plans confirming that the grading plans incorporate recommendations of the approved soil report(s).

g. ROG, NOX and dust during construction grading shall be suppressed by the following activities:

   i. The Project and its contractors shall ensure that, during construction, contractors shall turn off all diesel-powered construction vehicles when those vehicles are not in use and prohibit idling of vehicles for longer than three minutes.

   ii. All diesel engines used in construction equipment should use high-pressure injectors.

   iii. All diesel engines used in construction equipment should use reformulated diesel fuel if commercially available.

   iv. Fuel injection of all diesel engines used in construction equipment should be retarded two degrees from the manufacture's recommendation.

   v. All material transported off-site shall be either sufficiently watered or securely covered to prevent excessive amounts of dust.

   vi. All active portions of the site shall be either periodically watered or treated with environmentally safe dust suppressants to prevent excessive amounts of dust.

vii. Construction vehicles and trucks exiting the project site during grading operations shall be required to have the wash-downs to minimize dispersion of dust or other debris onto local streets.

h. The Owner/Developer shall submit a detail method and procedures with support analysis for review and approval to the Director of Public Works for backcut and installation of buttress fills for cut slope remediation located throughout the project.

55. Backfill of any pipe or conduit shall be in conformance with the approved Geotechnical report or as otherwise specified by the Director of Public Works.

56. Soil testing for trench compaction shall be performed on all trenching in conformance with the approved geotechnical report or as otherwise specified by the Director of Public Works.

57. Prior to issuance of a Grading Permit, the Owner/Developer shall submit to the Director of Public Works for review and approval, street improvement plans including drainage plans and hydraulic calculations prepared by a California Registered Civil Engineer and shall post sufficient surety guaranteeing the construction of the improvements.

58. Truck noise from hauling operations shall be minimized through establishing hauling routes that avoid residential areas within the City. The hauling plan must be identified as part of the grading plan and shall be approved by the Director of Public Works prior to issuance of a Grading Permit.

a. The Owner/Developer shall ensure construction equipment is fitted with modern sound-reduction equipment.

b. Stationary noise sources that exceed 70 dbA of continuous noise generation (at 50 feet) shall be shielded with temporary barriers if existing residences are within 350 feet of the noise source.

c. Designated-parking areas for construction worker vehicles and for materials storage and assembly shall be provided. These areas shall be set back as far as reasonably attainable from or otherwise shielded from existing residential neighborhoods.

d. Prior to commencement of grading operations, immediately surrounding property owners, shall be notified in writing of construction schedules for major grading, including when clearing and grading is to begin. Content of this required communication shall be approved by the Director of Public Works.

59. Prior to issuance of a Grading Permit, the Owner/Developer shall submit to the City for review and approval, a grading plan for each phase, prepared by a California Registered Civil Engineer, and shall enter into an agreement and shall post sufficient surety guaranteeing completion of all grading approved by the Director of Public Works.

60. Off-site import or export operations requiring transport of an excess of 500 cubic yards of material shall require City approval prior to commencement of hauling or staged grading operations. The Project shall require that the site preparation and grading contractors limit the daily disturbed area to five (5) acres or less.

    A haul route plan is to be submitted for review and approval by the Director of Public Works and Community Development Director. Additional surety for cleaning and or repair of the public streets shall be required as directed by the Director of Public Works. No stockpiles shall be placed on-site or off-site within the City without a grading plan approved by the Director of Public Works.

61. All requests for staged grading shall be submitted in writing to the Director of Public Works for review and approval (the amount of disturbed area shall be minimized to accommodate only the specific construction phase being constructed.)

62. Temporary irrigation, hydro-seeding and/or erosion control measures shall be implemented on all temporary grading. Temporary grading is defined to be any grading partially completed and any disturbance of existing natural conditions due to construction activity. These measures will apply to temporary grading activity that remains or is anticipated to remain unfinished or undisturbed in its altered condition for a period of time greater than thirty (30) days or the beginning of the rainy season whichever comes first.

63. Maximum gradient for any slope shall not exceed a 2:1 slope inclination except where special circumstances exist. In the case of special circumstances where steeper slopes are warranted, a certified soils engineer will review plans and their recommendations will be subject to review and approval of the Director of Public Works.

64. During grading, the following requirements shall apply:

    a. Grading may occur during the rainy season from October 15th to April 15th subject to approval by the Director of Public Works and installation of erosion control facilities. Erosion control measures shall be in place and functional between October 1st and April 30th. In order to comply with the October 1 date, revised erosion control plans shall be submitted to the Director of Public Works no later than September 1st of each year from the start of grading or clearing operations to the time of grading bond release.

b. Prior to any work being conducted within the City right of way, the Owner/Developer shall obtain all necessary encroachment permits from Director of Public Works.

c. During site preparation and construction, the Owner/Developer shall minimize disturbance of natural groundcover on the project site until such activity is required for grading and construction purposes. During grading operation, the Owner/Developer shall employ a superintendent for National Pollutants Discharge Elimination System ("NPDES") compliance. The NPDES superintendent shall be present, on the project site Monday through Friday and on Saturday if the probability of rain is 40% or higher and prior to the start of and during all grading or clearing operations until release of grading bonds. The NPDES superintendent shall have full authority to hire personnel, rent equipment and purchase materials to the extent needed to effectuate Best Management practices. The NPDES superintendent shall provide proof to the Director of Public Works of attendance and satisfactory completion of courses satisfactory to the Director of Public Works totaling no less than 8 hours directed specifically to NPDES compliance and effective use of Best Management Practices. Proof of such attendance and completion shall be provided to the Director of Public Works prior to employment of the NPDES superintendent.

d. During clearing, grading, earth moving or excavation operations, regular watering or application of other dust palliatives acceptable to the Director of Public Works shall be used to control dust. In addition, the following measures shall apply:

    i. Water (with potable or reclaimed at Owner/Developer's discretion) all site access roads and material excavated or graded on or off-site to prevent excessive amounts of dust. Watering shall occur a minimum of at least two times daily, preferably in the late morning and after completion of work for the day. Additional watering for dust control shall occur as directed by the Director of Public Works. The grading plan shall indicate the number of water trucks that will be available for dust control at each phase of grading.

    ii. Cease all clearing, grading, earth moving, or excavation operations during periods of high winds (greater than 15 mph averaged over one hour.) The contractor shall maintain contact with the Air Pollution Control District (APCS) Meteorologist for current information about average wind speeds. Water or securely cover all material transported off-site and on-site to prevent excessive amounts of dust.

    iii. Keep all grading and construction equipment on or near the site, until these activities are completed.

iv. The area disturbed by clearing, grading, earth moving, or excavation operations shall be minimized to prevent excessive dust generation.

v. Clean mud and dirt off heavy-duty construction vehicles before they leave the site.

65. After clearing, grading, earth moving, or excavation operations, and during construction activities, fugitive dust emissions shall be controlled using the following levels.

a. Apply non-hazardous chemical stabilizers to all inactive portions of the construction site. When appropriate, see exposed surfaces with a fast growing, soil binding plant to reduce wind erosion and its contribution to local particulate levels.

b. Periodically, or as directed by the Director of Public Works, sweep public streets in the vicinity of the site to remove silt (i.e. fine earth material transported from the site by wind, vehicular activities, water runoff, etc.), which may have accumulated from construction activities.

66. Prior to commencement of grading activities, the Owner/Developer shall coordinate with utility and service organizations regarding any construction activities to ensure existing facilities are protected and any necessary expansion or relocation of facilities are planned and scheduled in consultation with the appropriate public agencies.

67. Prior to issuance of a Precise Grading Permit for any production phase, the Owner/Developer shall submit to the Director of Public Works and Community Development Director a letter from utility and service providers confirming availability of services (i.e., water, wastewater etc.) to and from the site.

68. During site preparation and construction, the Developer shall construct temporary storm water diversion structures as approved by the Director of Public Works.

69. There shall be no sheet or concentrated flow of drainage leaving the project site and crossing adjacent property or draining into the public right-of-way.

70. Prior to issuance of a Grading Permit, the Owner/Developer shall submit to the Director of Public Works for review and approval a Water Quality Management Plan to address water quality impacts of the project which is consistent with NPDES Permit (R9-2015-0100; R9-2013-0001 as amended by R9-2015-0001) and the current Orange County Model WQMP at the time of plan submittal. The plan shall address low impact development (LID) and hydromodification requirements. The management regime recommended in this Plan shall be the governing document for long-term maintenance of water quality features included in the project. The City shall periodically monitor adherence to plans and management

guidelines contained in the Plan and may initiate action as necessary to ensure compliance by the property Owner/Developer with all conditions established by the plan.

71. As required by the State Construction General Permit and City of Aliso Viejo Stormwater Quality Management Program, a Storm Water Pollution Prevention Plan (SWPPP) shall be developed by a Qualified SWPPP Developer (QSD) to address pollution prevention and solid waste management during construction activities. Temporary erosion control measures shall be used during the construction process to minimize water quality impacts. Specific measures to be applied shall be identified in the project Erosion and Sediment Control Plan. A Qualified SWPPP Practitioner (QSP) shall be onsite during all construction activities. The following water quality assurance techniques shall be considered for implementation to the satisfaction of the Director of Public Works, as deemed necessary.

    a. Provide temporary soil cover, such as hydro-seeding, mulch, binder and erosion control blankets, to protect exposed soil from wind and rain.

    b. Incorporate silt fencing, berms, straw rolls, filter material and dikes to protect storm drain inlets and drainage courses.

    c. Incorporate rough grade contours to reduce flow concentrations and velocities.

    d. Divert runoff from graded areas, using straw bale, earth, and sandbag dikes.

    e. Minimize soil exposure during the October through April rainy season.

    f. Install sediment traps or basins.

    g. Maintain and monitor erosion/sediment controls.

72. To minimize water quality effects of permanent erosion sources, the following design features shall be considered for implementation into the project-grading plan to the satisfaction of the Director of Public Works. The Director of Public Works shall review and approve the grading plan to verify compliance with Best Management Practices features including, but not limited to the following:

    a. Drainage swales, subsurface drains, slope drains, storm drain.

    b. Inlet/outlet protection and sediment traps.

    c. Check dams to reduce flow velocities.

    d. Permanent desilting basins.

e. Permanent vegetation, including grass-lined swales.

f. Design of drainage courses and storm drain outlets to reduce scour.

g. Infiltration areas.

73. Prior to issuance of a Grading Permit, Owner/Developer shall prepare an Erosion and Sediment Control Plan to address construction impacts and long-term operational effects on downstream environments and watersheds. A qualified Civil Engineer shall prepare this plan. Use of jute, polymer, or other artificial cover or alternate means as approved by the Director of Public Works will be required for all graded slopes during the period of October 1 through, and inclusive of April 30. Proposed erosion control methods shall consider provisions for use of vegetative filtering in preparation of detailed erosion control plans, as well as appropriate use of temporary debris basis, silt fences, sediment traps and other erosion control practices. The proposed plan shall also address all relevant NPDES requirements and recommendations for use of best available technology. The erosion control plan shall be reviewed and approved by the Director of Public Works prior to issuance of grading permits for grading.

74. The Owner/Developer shall be required to obtain all clearances as administered by the Regional Water Quality Board and State Water Resource Board. These permits shall be obtained prior to initiating any grading permits or clearing and grubbing activities not covered under the City's Grading Ordinance.

75. All development areas and lots shall be designed so surface drainage is collected by an on-site private storm drain system prior to leaving the site and connecting to the existing municipal storm drain facilities.

76. Drainage plans and calculations shall indicate the following conditions before and after development: quantities of water, water flow rates, major water courses, drainage areas and patterns, diversion, collection systems, flood hazard areas, sumps, sump locations, detention facilities and drainage courses.

77. Hydrology shall be per the current Orange County Flood Control Standards except as follows:

a. All storm drains shall carry a 20-year frequency storm.

b. All catch basins shall carry a 20-year storm.

78. Surface drainage to adjacent landowners shall not be increased or concentrated by this development. All drainage measures necessary to mitigate storm water flows shall be provided by the Owner/Developer.

79. All flows from V-ditches, ribbon gutters and similar devices should be deposited into the storm drain system prior to entering streets as determined to the Director of Public Works' satisfaction during final engineering. If necessary, the storm drain system shall be extended beyond the public right-of-way through easements to eliminate surface flow between parcels. Both storm drains and easements outside the public right-of-way are to be maintained by the Property Owner/Developers Association unless otherwise approved by the City Council.

80. Prior to issuance of a Grading Permit, the color of all concrete drainage structures shall be as approved by the Director of Public Works and the Community Development Director, and to the extent possible shall incorporate natural structure and landscape to reduce their visibility.

81. Drainage for the development shall be designed and installed with all necessary appurtenances to safely contain and convey storm flows to their final point of discharge to the satisfaction of the Director of Public Works.

82. The Owner/Developer shall use reasonable efforts to minimize surface drainage over sidewalks and driveways on the site, subject to the Director of Public Works' satisfaction during final engineering.

83. The Owner/Developer shall provide all necessary on-site and off-site storm drain facilities to the satisfaction of the Director of Public Works to accommodate storm flows. Facilities, as shown on existing drainage studies and approved by the Director of Public Works, shall be delineated on the final drainage plans.

84. The Owner/Developer shall be in compliance with the National Pollutant Discharge Elimination System (NPDES) Requirements as follows:

    a. Prior to issuance of any construction or Grading Permit and commencement of any clearing, grading or excavation, the Owner/Developer shall obtain coverage from the State Water Resources Control Board under Order No. R9-2015-0100 (R9-2013-0001 as amended by R9-2015-0001) and submit evidence, to the satisfaction of the Director of Public Works, that the Notice of Intent (NOI) has been filed with the State Water Resources Control Board.

    b. The SWPPP shall identify potential pollutant sources that may affect quality of discharges to storm water and shall include design and placement of recommended Best Management Practices (BMP's) to effectively prohibit entry of pollutants from the construction site into the storm drain system.

    c. The Owner/Developer shall also comply with NPDES objectives as outlined in the "Storm Water Pollution Control Guidelines for Construction Sites."

d. Prior to grading permit issuance, Owner/Developer will provide facilities to comply with NPDES requirements. Runoff from development areas shall be infiltrated on-site through use of pervious construction materials, diverted to detention basins, or underground oil and grease traps or other Best Management Practices (BMP's) to the satisfaction of the Director of Public Works. A California registered Civil Engineer shall propose and design these devices as part of the drainage improvement plans for the project. Basins, traps and all other structural and non-structural NPDES facilities shall be maintained. Provisions CC&R's shall be made by the Owner/Developer to provide for maintenance of said facilities in perpetuity, which shall be approved by the Director of Public Works.

e. Prior to City issuance of the initial Grading Permit, the Developer shall obtain all necessary NPDES related permits. Grading permits issued for the development shall require Developer to provide schedules and procedures for onsite maintenance of earthmoving and other heavy equipment and documentation of proper disposal of used oil and other lubricants.

f. Project construction plans shall note and incorporate that the contractor shall comply with the "California Storm Water Best Management Practice Handbooks" – Best Management Practices (BMP's) applicable to the development and to the satisfaction of the Director of Public Works. Said requirements shall include implementation of the following requirements by the Property Owner/Developers Association:

    i. All onsite storm drain inlets shall be labeled "Don't Dump Drains to Ocean."

    ii. No outdoor vehicle maintenance shall be allowed. For purposes of this condition, car washing shall not be considered vehicle maintenance.

    iii. All common area property shall be maintained free of litter and debris.

    iv. All on-site storm drains shall be cleaned using approved methods at least twice a year, once immediately prior to October 1 and once in January. The Director of Public Works may require additional cleaning during the construction of the project.

    v. All common sidewalks, walkways, and parking areas shall be swept regularly to prevent the accumulation of litter and debris. When swept or washed, debris must be trapped and collected to prevent entry to the storm drain system. No cleaning agent may be discharged into a storm drain system. Wash water shall not be discharged to the storm drain; wash water shall be collected and discharged to the sanitary

sewer. Discharges to the sanitary sewer are subject to review and approval of the Moulton Niguel Water District.

vi. Grease interceptors shall be installed for all commercial food preparation spaces. The Developer shall provide the City with a maintenance program for such devices. The CC&R's shall include a requirement that the grease interceptors are maintained in a manner consistent with requirements of the Maintenance Program.

85. Prior to issuance of a Grading Permit, a final drainage plan shall be submitted for review and approval by the Director of Public Works. The drainage plan shall follow criteria and requirements of the Orange County Flood Control District Hydrology Manual, Orange County Local Drainage Manual, and Orange County Flood Control District Design Manual.

86. The Owner/Developer shall design detention basins in such a way that they will be aesthetic, safe and easy to maintain, and that the basins are not an "attractive nuisance."

87. The Owner/Developer shall demonstrate all habitable structures and other non-flood proof structures will be protected for 100-year return frequency flood level.

88. The Owner/Developer shall cause surface water to be conveyed into the underground drainage system on site. No parkway (under sidewalk) drains shall be allowed.

89. Owner/Developer will be required to have all contractors and sub-contractors have all construction materials be recycled in conformance with the municipal waste reduction ordinance.

90. Prior to issuance of a Grading Permit, Owner/Developer shall prepare a hydrology study for review and approval by the Director of Public Works. The hydrology study shall include hydraulic calculations addressing the surface drainage system and the off-site system to accommodate the project generated flows.

91. Prior to commencement of grading activities, the Owner/Developer shall coordinate with utility and service organizations regarding any construction activities to ensure existing facilities are planned and scheduled in consultation with appropriate public agencies.

92. Car washing shall be prohibited on the property unless an area is designated and designed to meet all requirements for water quality. If desired, prior to issuance of a Precise Grading Permit, the Owner/Developer shall locate and design an area on the site to be dedicated for car washing by residents of the development. The plans shall be reviewed and approved by the Director of Public Works and Community Development Director.

Conditions Required Prior to the Issuance of a Building Permit

Building Department Conditions

93. Prior to issuance of a Building Permit, the Owner/Developer shall obtain all necessary and required approval of project plans from all City Departments, County of Orange, and all other applicable outside agencies.

94. Prior to issuance of a Building Permit, the Owner/Developer shall submit payment, or proof of payment prior to issuance of a building permit for that particular phase any and all applicable plan check, school, water, sewer, Transportation Corridor, and other public benefit fees, if not previously paid. Owner/Developer shall submit evidence of said payments.

95. Prior to issuance of a Building Permit, the Owner/Developer shall provide rough grade pad certification confirming the site has been graded in accordance with the approved grading plan.

96. Owner/Developer shall furnish, three (3) complete sets of plans (structural, mechanical, electrical, and plumbing). Said plans submitted shall contain two (2) copies of soil reports, liquefaction investigation reports and structural calculations.

97. The cover sheet of building construction documents shall contain a blue-line print of the City's Conditions of Approval and it shall be attached to each set of plans submitted for any construction or demolition or shall be printed on the title sheet verbatim.

98. Building addresses shall be located facing street fronting property for each building approved by the Building Department and OCFA.

99. All plans shall be designed in conformance with the 2019 editions of the California Building Code, California Plumbing Code, California Mechanical Code, California Electrical Code, and the Aliso Viejo Municipal Code.

Fire Department Conditions

100. Prior to issuance of a Building Permit, an architectural plan (service codes PR200-PR285) shall be submitted and approved by OCFA.

101. Prior to issuance of a Building Permit, underground piping for private hydrants and fire sprinkler system (service codes PR470-PR475) shall be submitted and approved by OCFA.

102. Prior to issuance of a Building Permit, a fire sprinkler system plans (service codes PR400-PR465) shall be submitted and approved by OCFA.

Planning Department Conditions

103. Prior to issuance of a Building Permit, the Owner/Developer shall include in the construction plans provisions to allow for solar thermal and photovoltaic systems to be installed if warranted.

104. Prior to issuance of a Building Permit, the Owner/Developer shall submit to the Community Development Director and the Director of Public Works for review a current title report, which clearly states all interested parties and lenders included within the limits of the project as well as any easements that affect the property.

105. Any planned entry monumentation shall not interfere with sight-distance or turning movements. Landscaping shall be provided appropriate to the entry that will not interfere with sight-distance or turning movement operations. Entrance landscaping shall extend along the full frontage of the project to provide traffic calming, consistent with current landscape design practice consistent with the requirements of the Aliso Viejo Municipal Code and applicable sign program.

106. Lighting shall comply with applicable standards of the Aliso Viejo Municipal Code. Proposed on site lighting shall be shielded and confined within project site boundaries. No direct rays or glare are permitted to shine onto public streets or adjacent single-family or multi-family residential sites or create a public nuisance.

107. Prior to issuance of a Building Permit, the Owner/Developer shall submit a Lighting Plan to the Community Development Director and the Crime Prevention Specialist for review and approval. The Lighting Plan shall identify type and location of proposed lighting fixtures for buildings, parking structures, open parking lots, walkways, and access thereto, including height of said fixtures, with an associated photometric analysis modeling showing lighting effects such as spill coverage. The Lighting Plan shall conform to the following criteria:

    a. Maintain the minimum illumination level required by CPTED, while limiting spill onto adjacent properties to the maximum extent practicable. All exterior lighting shall be directed downward and away from adjoining property, major public roadway or public area, with luminaries shielded to prevent unnecessary glare.

    b. Lighting standards for parking areas shall be the same throughout the project.

    c. Exterior lighting devices serving security purposes shall be protected by a weather and vandal-resistant covering and be illuminated from dusk to dawn.

Police Services Department Conditions

108. Pursuant to Zoning Code Appendix A: Requirements for Crime Prevention Through Environmental Design (CPTED), nonresidential buildings shall display a street address number conforming to the following specifications:

    a. Numerals shall be located where they are clearly visible from the street on which they are addressed. They shall be of a color contrasting to the background to which they are affixed. Method of attachment shall not include the use of 2-sided tape or any material not resistant to weather conditions.

    b. Numerals shall be 6 to 8 inches in height if located less than 100 feet from the centerline of the addressed street or 18 to 24 inches in height if located further than 100 feet from the centerline. The numerals shall be illuminated during the hours of darkness using a light source provided with an uninterruptible A.C. power source or controlled by a photocell device.

    c. The rear doors of all buildings shall have address numbers 6 to 8 inches in height which shall be of a color contrasting to the background to which they are affixed.

109. Pursuant to Zoning Code Appendix A: Requirements for Crime Prevention Through Environmental Design (CPTED), buildings, open parking lots, walkways, and accesses in nonresidential complexes shall conform to the following lighting standards:

    a. All types of exterior doors shall be illuminated during the hours of darkness, with a minimum maintained 1 foot-candle of light, measured within a 5-foot radius on each side of the door at ground level. The light source shall be controlled by a photocell device or an uninterruptible A.C. power source.

    b. Recessed areas of buildings or fences, which have a minimum depth of 2 feet, a minimum height of 5 feet, and do not exceed 6 feet in width and are capable of human concealment, shall be illuminated with a minimum maintained 0.5 foot-candles of light at ground level during the hours of darkness. This requirement only applies to defined recessed areas which are within 6 feet of the edge of a designated walking surface with an unobstructed pathway to it that is not hindered by walls or hedge row landscaping a minimum of 2 feet in height. The light source may be motion detectors with a photocell device.

    c. Stairways shall be illuminated with a vandal resistant light fixture with a minimum maintained 1 foot-candle of light on all landings and/or stair treads, during the hours of operation and darkness. The interior service stairways shall be painted a light, highly reflective color.

d. All interior or exterior corridors, passageways and walkways in any hotel, motel or inn shall be illuminated at all times with a minimum maintained 1 foot-candle of light on the walking surface.

e. All exterior pedestrian walkways, interior common corridors, and open parking lots shall be illuminated with a minimum maintained 1 foot-candle of light on the walking or driving surface during the hours of operation and darkness.

f. The light source utilized to comply with this section shall have a rated average bulb life of not less than 10,000 hours.

g. Accessible luminaires utilized to meet the requirements of this section shall have vandal resistant light fixtures and be not less than 3 feet in height from ground level when used to illuminate walkways and a minimum of 8 feet in height from ground level when illuminating surfaces associated with vehicles. Light fixtures shall be deemed accessible if mounted within fifteen feet vertically or 6 feet horizontally from any accessible surface or any adjoining roof, balcony, landing, stair tread, platform or similar structure.

h. A site plan shall be provided showing buildings, parking area, walkways, detailed landscaping and a point-by-point photometric calculation of the required light levels. Foot-candles shall be measured on a horizontal plane and conform to a uniformity ratio of 4:1 average/minimum. Landscaping shall not be planted so as to obscure required light levels.

i. All lighting on the property shall be designed to prevent spillover onto neighboring properties.

110. Pursuant to Zoning Code Appendix A: Requirements for Crime Prevention Through Environmental Design (CPTED), to maintain sufficient illumination for security purposes, landscaping plans shall be designed so that trees and other landscaping do not obstruct light sources from outdoor fixtures, including parking lot lighting.

111. Pursuant to Zoning Code Appendix A: Requirements for Crime Prevention Through Environmental Design (CPTED), landscaping shall be designed so that trees and other landscaping do not obstruct views of traffic signs or address numerals on buildings.

Public Works Department Conditions

112. The Owner/Developer's Landscape Plan shall be prepared by a State licensed landscape architect and shall include all proposed and existing plant materials (location, type, size, and quantity), an irrigation plan, a grading plan, an approved site plan and a copy of the entitlement conditions of approval. The

Owner/Developer shall post surety guaranteeing the construction of the improvements. The Plan shall be reviewed and approved by the Director of Public Works and the Community Development Director.

113. The Owner/Developer's Landscape Plan shall include elements to the extent practicable to protect existing and proposed pavements from root damages.

114. The Owner/Developer's Landscape Plan shall conform to the City's current Water Efficient Landscape Regulations at the time of submittal.

115. All graded slopes shall be permanently planted in a timely manner meeting the approval of the Director of Public Works and in compliance with the approved Landscape Plan with groundcover, trees and shrubs that will stabilize slopes and minimize erosion.

116. Pad certification by the Design Civil Engineer and Soil Engineer is required prior to commencing construction of any building foundation or structure.

Conditions Required Prior to Concealing Interior Construction

Fire Department Conditions

117. Prior to concealing interior construction, fire alarm system plans (service codes PR500-PR520) shall be submitted and approved by OCFA.

Conditions Required Prior to Final Building Inspection or Occupancy Permit

Building Department Conditions

118. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall obtain final approval for all City departments and County agencies.

119. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall submit final compliance report from all independent deputy inspection firms involved in the project outlining each area of inspection.

120. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall submit a final compliance report from Structural Engineer of Record.

121. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall provide copies of all Title 24, Part 6 Certificate of Acceptance Forms including all lighting, electrical and mechanical.

Fire Department Conditions

122. Prior to issuance of temporary or final certificate of occupancy, all OCFA inspections shall be completed to the satisfaction of the OCFA inspector and be in substantial compliance with codes and standards applicable to the project and commensurate with the type of occupancy (temporary or final) requested. Inspections shall be scheduled at least five days in advance by calling OCFA Inspection Scheduling at (714) 573-6150.

Planning Department Conditions

123. All temporary units, equipment, and fencing shall be removed from the site prior to final inspection for the final building construction project on site.

124. Prior to issuance of a Certificate of Occupancy, the Owner/Developer shall schedule an inspection by the Department of Planning Services to ensure the project was completed to the satisfaction of the Community Development Director and be in substantial compliance with codes and applicable standards.

Police Services Department Conditions

125. Prior to issuance of a Certificate of Occupancy, the Owner/Developer shall schedule an inspection by the Aliso Viejo Police Services Crime Prevention Specialist to confirm the implementation of CPTED standards and security hazards have been mitigated to the satisfaction of the Crime Prevention Specialist.

Public Works Department Conditions

126. Prior to issuance of a Certificate and Occupancy, the landscape architect shall provide written certification to the City stating installation is in substantial conformance with the approved landscape plans. If there are variations, the variations shall be approved by the Director of Public Works and Community Development Director.

127. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall provide a written certification for the operation of all backflow devices.

128. Prior to issuance of a Certificate of Occupancy, construction of all street and common area improvements in a given phase of the project shall be completed to the satisfaction of the Director of Public Works and the Community Development Director.

RECEIVED
JUL 21 2021
PLANNING DEPARTMENT

July 20, 2021

City of Aliso Viejo
Community Development Department
Planning Services Division
12 Journey, Suite 100
Aliso Viejo, CA 92656

Re: Proposed Amy's Drive Thru
Project Description & Justification
26641 Aliso Creek Rd.
Aliso Viejo, CA 92656

To Whom It May Concern:

Amy's Drive Thru (Applicant) is the nation's first organic, vegetarian drive thru, serving American classics with a conscience. From burgers and fries to milkshakes, salads, and burritos, everything Amy's Drive Thru serves is prepared to order using organic and non-GMO ingredients. The entire menu can also be made gluten free and/or vegan. Applicant is proposing to build a new 4,560 sq. ft. freestanding drive thru restaurant at 26641 Aliso Creek Rd. The proposed new building will be replacing the existing Romano's Macaroni Grill Restaurant and will be smaller in size than the existing condition. The Applicant intends to provide two outdoor patios - one at 900 SF and another with a family friendly focus at 600 SF. The facility will also feature a living roof and other environmentally friendly aspects of the design. 32 parking spaces will be provided on the Applicant's legal parcel. The proposed hours of operation will be Monday through Sunday 10:30 am to 10:00 pm and may expand to include breakfast in the future.

Amy's Drive Thru will be requesting a Conditional Use Permit (CUP) for the proposed restaurant drive-through, an Administrative Use Permit (AUP) for the outdoor dining, a Site Development Permit (SDP) for the building and Exemption Permits (EP) for the parking and the outdoor patio greater than 1,000 SF. Applicant is seeking these entitlements as it would like to

provide the surrounding community with quickly prepared, easily accessible and healthy food from a facility that provides an exceptional customer experience. To serve Amy's Drive Thru customers using the drive through, a thoughtfully designed service queue has been incorporated which includes space for 16 cars not including two pull-ahead spaces (18 total) where cars can wait for short periods of time if orders are not ready at the window. Staff runs food to these spaces as needed, and allows for the queue to remain flowing.

Required Findings:

1. Consistency with General Plan. The project is consistent with the general plan and any applicable specific plan.

The proposed Amy's Drive Thru will be consistent with the General Plan as the property is zoned Town Center Commercial (CT) and a restaurant is a permitted use.

2. Consistency with Zoning Code. The land use and associated development conform to the permitted use provisions and development standards of this zoning code and is consistent with this code and any applicable specific plan.

The proposed Amy's Drive Thru will be consistent with the Zoning Code as the property is zoned Town Center Commercial (CT) and a restaurant is a permitted land use in this zone. The proposed development also meets all the requirements and development standards associated with a commercial project located in the Town Center Commercial (CT) zone.

3. Compliance with CEQA. Processing and approval of the permit application are in compliance with the requirements of the California Environmental Quality Act.

The proposed Amy's Drive Thru will comply with all CEQA requirements.

4. Architectural Design. The architectural design of the project, including but not limited to the architectural style, scale, building mass, materials, colors, architectural details, and roof style, is compatible with surrounding development.

The Amy's Drive Thru team thoughtfully designs each restaurant for a great customer experience and the overall facility is beautiful, particularly when compared to other drive through brands. The scale is being reduced, with ample outdoor garden and patio areas. Architectural details and overall design are compatible with the surrounding environment and

elevate from the current condition. Applicant is proposing a living roof for this location which offers many different benefits from environmental to aesthetic.

5. Site Design. The site design of the project, including but not limited to project entries, interior circulation, pedestrian and bicycle access, pedestrian amenities, screening of equipment and trash enclosures, exterior lighting, and other site design elements, is compatible with surrounding development.

The design for this location was thoroughly vetted for several months to make sure the best design possible could be produced while also taking into account a myriad of site and area specific factors. All of the concepts referenced in this section have been addressed in a considerate manner.

6. Landscape Design. Project landscaping, including but not limited to the location, type, size, color, texture, and coverage of plant materials, has been designed so as to provide visual relief, complement buildings, visually emphasize prominent design elements and vistas, screen undesirable views, provide a harmonious transition between adjacent land uses and between development and open space, and provide an overall unifying influence to enhance the visual continuity of the project.

The landscape design is something the Amy's Drive Thru team is always very concerned about. This concern is not for how little a group can landscape as is often the case with retail and restaurant development, but what the most beautiful and welcoming area-specific design can be. In this instance the site currently has several beautiful palm trees, most of which are being adopted into the new design. Screening cars in the queue lane and creating great outdoor dining areas, among other considerations, were addressed in the landscape design.

Sincerely,

Jason Dedmore
Director of Real Estate & Development
Amy's Drive Thru

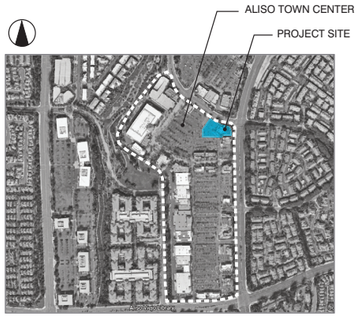
PLANNING PERMIT APPLICATION RE-SUBMITTAL 3

26641 ALISO CREEK ROAD, ALISO VIEJO,CA

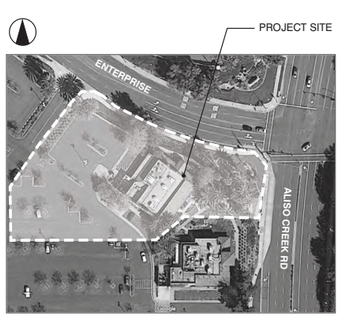
DECEMBER 10, 2021



VICINITY MAP



SITE MAP



SITE INFORMATION

ZONE: CT TOWN CENTER COMMERCIAL

PARKING SUMMARY

BUILDING AREA SQUARE FOOTAGE 1- STORY BUILDING PATIO DINING AREA SQUARE FOOTAGE	4,558 SF 615 SF
TOTAL GROSS SQUARE FOOTAGE	5,173 SF
REQUIRED 1 SPOT PER 100 SF GFA	52 SPOTS
PROVIDED PARKING (WITHIN PROPERTY LINE)	32 SPOTS

*REMAINDER OF PARKING REQUIRED IS SHARED DEVELOPMENT PARKING

APPLICABLE CODES

2019 CALIFORNIA (CA) BUILDING CODE, PART 2, TITLE 24 VOL 1&2
2019 CA ELECTRICAL CODE
2019 CA ENERGY CODE, TITLE 24, PART 6
2019 CA GREEN BUILDING STANDARDS CODE, TITLE 24 PART 11
2019 CA MECHANICAL CODE TITLE 24, PART 4
2019 CA PLUMBING CODE TITLE 24, PART 5
2019 CA RETAIL FOOD CODE & ORANGE COUNTY ENVIRONMENTAL HEALTH
2019 CA FIRE CODE
ALISO VIEJO MUNICIPAL CODE

PROJECT TEAM

CLIENT

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PETALUMA, CA 94954
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LOUISE SELIN

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708-445-1788 (FAX)
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JOE JUNIUS, KRISTIN MROZINSKI

M.P.E ENGINEERS

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HANNA LA LONDE

CIVIL ENGINEERS

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CONTACT: BRUCE KIRBY, LLOYD BUENDIA

LANDSCAPE

CAMP AND CAMP ASSOCIATES
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925-941-6490 x105 (TEL.)
CONTACT: ROCKY AVITIA

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E1.0 SITE PHOTOMETRICS PLAN

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ARIA GROUP ARCHITECTS, INC.

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Amy's DRIVE THRU

FIELD VERIFICATION
Contractor shall verify all figured dimensions and conditions at the job site and notify Aria Group Architects, Inc. of any dimensional errors, omissions or discrepancies before beginning or fabricating any work. Do not scale these drawings.

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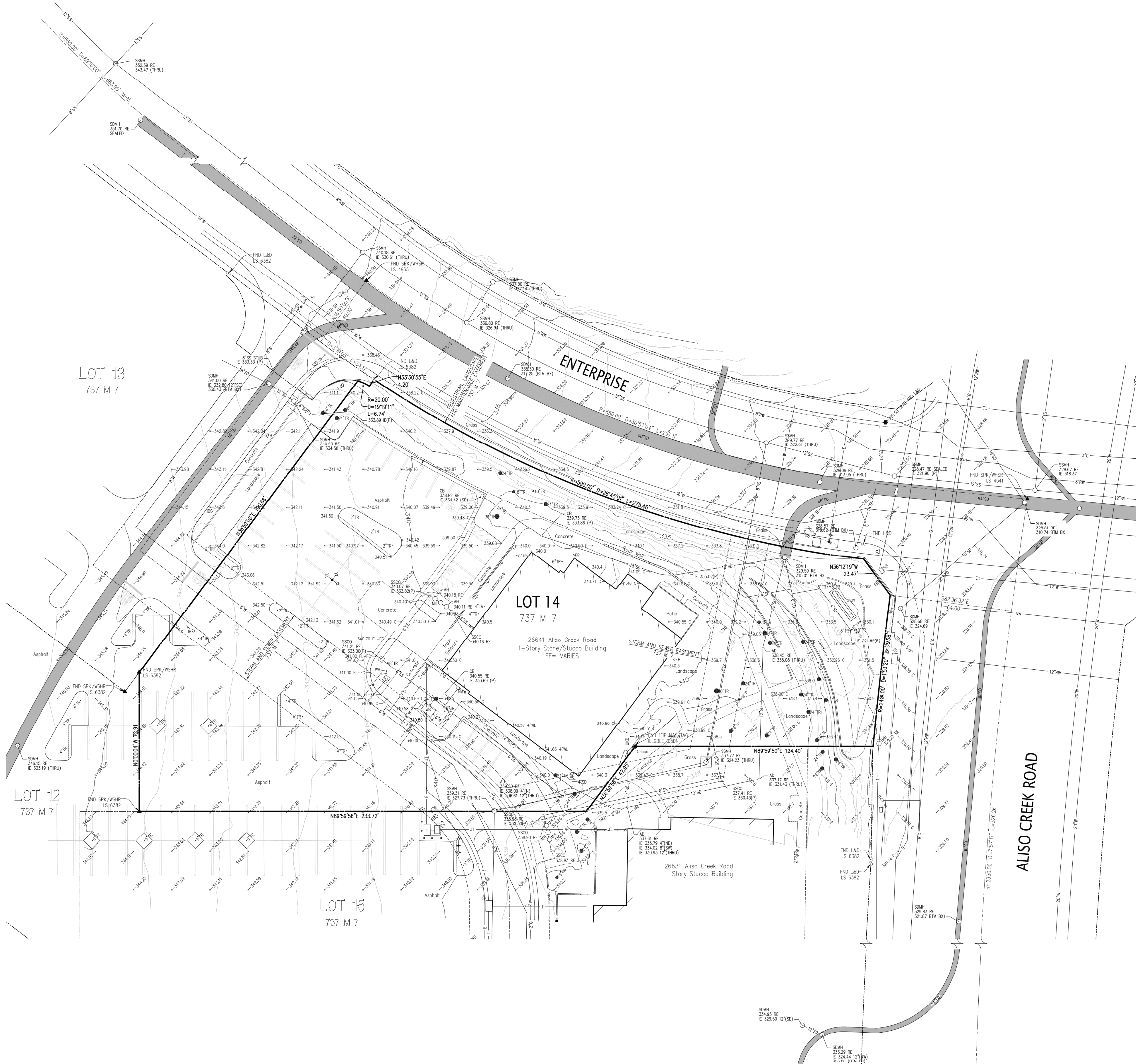
REVISIONS

Drawing Title
COVER SHEET

Job No. 214691
Drawn

Scale PER PLAN
Date 11/04/21

Sheet No.
CS



NORTH

0 10 20 40 60

Scale 1" = 20'

LEGEND

- BUILDING LINE
- CONCRETE/BLOCK WALL
- CONCRETE CURB
- CONCRETE CURB & GUTTER
- MAJOR CONTOUR LINE
- MINOR CONTOUR LINE
- EASEMENT LINE
- EDGE OF WATER/FLOWLINE
- ELECTRIC LINE
- FIBER OPTICS LINE
- FIRE SERVICE LINE & VALVE
- GAS LINE-VALVE & METER
- GUARD RAIL
- JOINT TRENCH LINE
- LOT LINE
- MONUMENT/MONUMENT LINE
- PROPERTY LINE
- RECLAIMED WATER LINE & VALVE
- SANITARY SEWER LINE-MANHOLE & CLEANOUT
- SIDEWALK
- SPOT ELEVATION
- STORM DRAIN LINE-MANHOLE & CATCH BASIN
- STORM DRAIN LINE OVER 24"DIAMETER
- TELEPHONE LINE
- TRAFFIC SIGNAL CONDUIT LINE
- CABLE TELEVISION LINE
- UNKNOWN UTILITY LINE
- WATER LINE & VALVE
- ACCESSIBLE PARKING SYMBOL
- AREA DRAIN
- BLOWOFF VALVE
- ELECTROLIER
- FIRE DEPARTMENT CONNECTION
- FIRE HYDRANT
- GAS METER
- IRON PIPE FOUND
- NAIL FOUND
- RAILROAD SPIKE FOUND
- TRANSFORMER
- TRAFFIC SIGNAL POLE
- TRAFFIC SIGN
- TREE
- UTILITY BOX
- UTILITY LINE MARKER
- WALK-BOLLARD LIGHT
- WATER VALVE

ABBREVIATIONS

AD	AREA DRAIN
BOV	BLOW-OFF VALVE
CB	CATCH BASIN
E	EAST
EB	ELECTRIC BOX
EV	ELECTRICAL VAULT
FDC	FIRE DEPARTMENT CONNECTION
FF	FINISH FLOOR
FH	FIRE HYDRANT
FND	FOUND
GM	GAS MARKER/METER
GV	GAS VALVE
IB	IRRIGATION BOX
IE	INVERT ELEVATION
JT	JOINT TRENCH
L&D	LEAD & DISC
LS	LAND SURVEYOR
LT	LIGHT
MH	MANHOLE
N	NORTH
(P)	PER PLAN
RE	RIM ELEVATION
RW	RECLAIMED WATER LINE
S	SOUTH
SDMH	STORM DRAIN MANHOLE
SLB	STREET LIGHT BOX
SS	SANITARY SEWER
SSCO	SANITARY SEWER CLEAN OUT
SSMH	SANITARY SEWER MANHOLE
TB	TELEPHONE BOX
TMH	TELEPHONE MANHOLE
TRN	TRANSFORMER
TSB	TRAFFIC SIGNAL BOX
W	WEST
WB	WATER BOX
WM	WATER METER
WTR	WATER
WV	WATER VALVE

NOTES

1. THE BOUNDARY, EASEMENT, AND OTHER ENCUMBRANCES SHOWN ON THIS DRAWING ARE BASED SOLELY UPON INFORMATION CONTAINED IN THE FOLLOWING DOCUMENTS:
TRACT NO. 15225, FILED FOR RECORD ON JUNE 24, 1996 IN BOOK 737 OF MAPS AT PAGES 7-17

2. ALL DISTANCES AND ELEVATIONS SHOWN HEREON ARE IN FEET AND DECIMALS THEREOF.

3. THE TYPES, LOCATIONS, SIZES AND/OR DEPTHS OF EXISTING UNDERGROUND UTILITIES AS SHOWN ON THIS TOPOGRAPHIC SURVEY WERE OBTAINED FROM SOURCES OF VARYING RELIABILITY. THE CONTRACTOR IS CAUTIONED THAT ONLY ACTUAL EXCAVATION WILL REVEAL THE TYPES, EXTENT, SIZES, LOCATIONS AND DEPTHS OF SUCH UNDERGROUND UTILITIES. (A REASONABLE EFFORT HAS BEEN MADE TO LOCATE AND DELINEATE ALL KNOWN UNDERGROUND UTILITIES). HOWEVER, THE ENGINEER CAN ASSUME NO RESPONSIBILITY FOR THE COMPLETENESS OR ACCURACY OF ITS DELINEATION OF SUCH UNDERGROUND UTILITIES WHICH MAY BE ENCOUNTERED, BUT WHICH ARE NOT SHOWN ON THESE DRAWINGS.

4. THIS SURVEY DOES NOT SHOW THE LOCATIONS OF THE FOLLOWING UNDERGROUND UTILITY LINES DUE TO THE FACT THAT THE CLIENT HAS NOT FURNISHED KIER & WRIGHT CIVIL ENGINEERS & SURVEYORS, INC. WITH ANY PLANS THAT DELINEATE THEIR LOCATIONS: CABLE TELEVISION LINES, NITROGEN LINES, (IF ANY). ALL PARTIES SHOULD CONSIDER THIS SURVEY AS PRELIMINARY WITH REGARDS TO THE LOCATION OF THE UTILITY FACILITIES. UPON RECEIPT OF THIS INFORMATION KIER & WRIGHT WILL UPDATE THIS SURVEY AND REISSUE IT.

5. PHYSICAL ITEMS SHOWN ON THIS SURVEY ARE LIMITED TO THOSE ITEMS VISIBLE AS OF THE DATE OF THIS SURVEY. SUBSURFACE STRUCTURES, IF ANY, ARE NOT SHOWN. SAID SUBSURFACE OBJECTS MAY INCLUDE, BUT ARE NOT LIMITED TO, CONCRETE FOOTINGS, SLABS, SHORING, STRUCTURAL PILES, UTILITY VAULTS, PIPING, UNDERGROUND TANKS, AND ANY OTHER SUBSURFACE STRUCTURES NOT REVEALED BY A SURFACE INSPECTION.

6. THE SUBJECT PROPERTY IS SHOWN ON THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA) FLOOD INSURANCE RATE MAP (FIRM) FOR ORANGE COUNTY, CALIFORNIA, MAP NUMBER 06059C0428J FOR COMMUNITY NUMBER 060770 (CITY OF ALISO VIEJO), WITH AN EFFECTIVE DATE OF DECEMBER 3, 2009, AS BEING LOCATED IN FLOOD ZONE "X". ACCORDING TO FEMA THE DEFINITION OF ZONE "X" IS: AREAS DETERMINED TO BE OUTSIDE THE 2% ANNUAL CHANCE FLOODPLAIN.

FEMA BASE FLOOD ELEVATIONS ARE BASED ON NAVD88 DATUM.

7. BENCHMARK:
CITY OF LAGUNA HILLS 1-1/2" BRASS DISK STAMPED "CLH-2-98 BM" SET ON THE WESTERLY CORNER OF A 3 FOOT BY 22 FOOT CONCRETE CATCH BASIN. MONUMENT IS LOCATED IN THE NORTHEAST PART OF THE INTERSECTION OF MOULTON PARKWAY, 65 FOOT NORTHERLY FROM THE CENTERLINE OF MOULTON PARKWAY AND 130 FEET EASTERLY FROM THE CENTERLINE OF ALICIA PARKWAY. MONUMENT IS SET LEVEL WITH THE SIDEWALK. ELEVATION=242.082 (NAVD88).

8. BASIS OF BEARINGS:
THE BEARING OF NORTH 53° 10' 00" WEST TAKEN ON THE MONUMENT LINE OF ENTERPRISE AS SHOWN ON THAT CERTAIN TRACT MAP, NUMBER 15225 FILED FOR RECORD ON JUNE 24, 1996, IN BOOK 737 OF MAPS AT PAGES 7-17, OFFICIAL RECORDS OF ORANGE COUNTY WAS TAKEN AS THE BASIS FOR ALL BEARINGS SHOWN HEREON.

9. CORNER RECORD NOTE:
THE DEVELOPER AND/OR CONTRACTOR SHALL BE RESPONSIBLE FOR THE PREPARATION AND FILING OF PRE-CONSTRUCTION AND POST-CONSTRUCTION CORNER RECORDS FOR ANY MONUMENTS OR PROPERTY CORNERS SHOWN HEREON THAT MAY BE DESTROYED DURING IMPROVEMENTS TO THE SUBJECT PROPERTY AS DEFINED IN SECTION 8771(B) OF THE PROFESSIONAL LAND SURVEYORS ACT.

PREPARED BY OR UNDER THE SUPERVISION OF JOSEPH D. THOMPSON, P.L.S. 8121 — 03/18/2021 DATE

LICENSED LAND SURVEYOR JOSEPH D. THOMPSON No. 8121 STATE OF CALIFORNIA

NOTE: TOPO SURVEY IS SHOWN FOR REFERENCE ONLY. NOT TO SCALE

NO.	REVISION	BY

KIER+WRIGHT
2850 Collier Canyon Road
Livermore, CA 94551
Phone: (925) 245-8788
www.kierwright.com

TOPOGRAPHIC SURVEY
OF
26641 ALISO CREEK ROAD
FOR
AMY'S KITCHEN, INC.

ALISO VIEJO, CALIFORNIA

DATE	JAN., 2021
SCALE	AS SHOWN
SURVEYOR	JDT
DRAWN BY	REG
JOB NO.	A21503
SHEET	C1.0
OF 1 SHEETS	

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REGISTERED PROFESSIONAL ENGINEER BRUCE W. KIRBY No. C 42393 CIVIL STATE OF CALIFORNIA

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Amy's® DRIVE THRU

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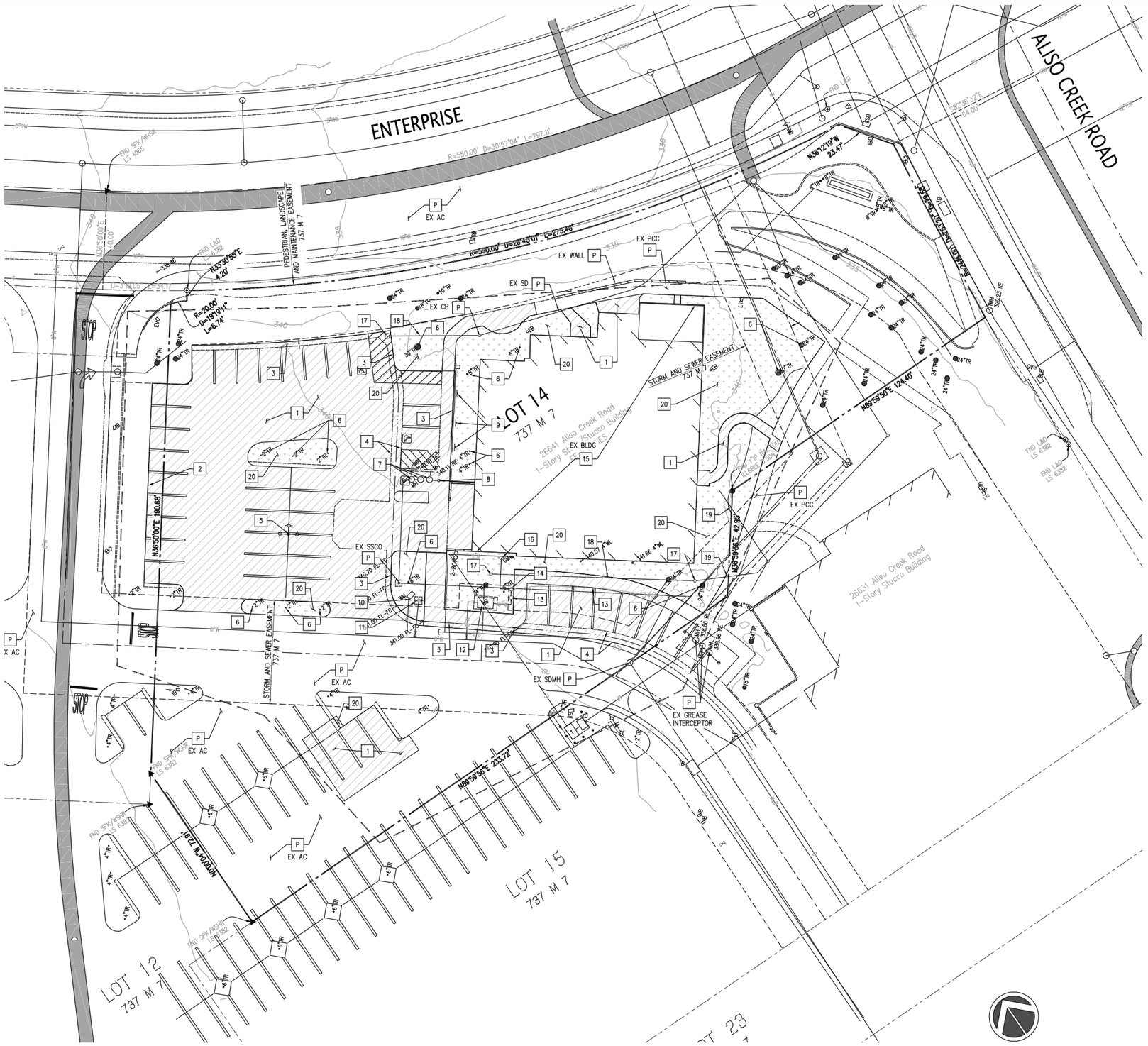
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Drawing Title
EXISTING CONDITIONS

Job No. 211085	Drawn LB
Scale PER PLAN	Date 11/04/21

Sheet No. C100

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GRAPHIC SCALE

30 0 10 20 40 80

(IN FEET)
1 inch = 20 ft.

DEMOLITION CONSTRUCTION NOTES:

	P	PROTECT EXISTING IMPROVEMENTS IN PLACE
▨	1	REMOVE EXISTING PAVEMENT (AC, PCC, OR PAVERS)
	2	REMOVE EXISTING CURB
	3	REMOVE EXISTING CURB AND GUTTER
	4	REMOVE EXISTING PCC SWALE
	5	REMOVE EXISTING SITE LIGHTING. VERIFY WITH ELECTRICAL PLANS PRIOR TO DEMO
	6	REMOVE EXISTING TREE. VERIFY WITH LANDSCAPE PLANS PRIOR TO DEMO
	7	REMOVE EXISTING GREASE INTERCEPTOR
	8	REMOVE EXISTING SEWER CLEANOUT
	9	REMOVE EXISTING SIGN
	10	REMOVE EXISTING WATER METER
	11	RELOCATE EXISTING FIRE HYDRANT. SEE SHEET C400 FOR NEW LOCATION
	12	RELOCATE EXISTING FIRE WATER VAULT. SEE SHEET C400 FOR NEW LOCATION
	13	REMOVE EXISTING POST INDICATOR VALVE
	14	REMOVE EXISTING FIRE DEPARTMENT CONNECTION
	15	REMOVE EXISTING BUILDING
	16	REMOVE EXISTING GAS METER. VERIFY WITH MEP PRIOR TO DEM
	17	REMOVE EXISTING AREA DRAIN/ CATCH BASIN
	18	REMOVE EXISTING STORM DRAIN
	19	CAP EXISTING STORM DRAIN
⋰⋱	20	REMOVE EXISTING LANDSCAPING. SEE LANDSCAPE PLANS TO PRIOR TO DEMO

ABBREVIATIONS

AC	ASPHALT CONCRETE PAVEMENT
BLDG	BUILDING
CB	CATCH BASIN
PCC	PORTLAND CEMENT CONCRETE
SD	STORM DRAIN
SDMH	STORM DRAIN MANHOLE
SSCO	SANITARY SEWER CLEANOUT

LEGEND:

PROJECT LIMITS

DEMOLITION NOTES:

1. PROTECT ALL EXISTING UNDERGROUND UTILITIES UNLESS OTHERWISE NOTED ON THE PLAN.
2. UTILITIES SHOWN ON THIS PLAN ARE DERIVED FROM RECORD DATA, SURFACE OBSERVATION, AND FIELD SURVEY. ACTUAL LOCATIONS AND SIZE, TOGETHER WITH THE PRESENCE OF ANY ADDITIONAL UTILITIES NOT SHOWN ON THIS PLAN, SHALL BE VERIFIED BY THE CONTRACTOR PRIOR TO COMMENCING DEMOLITION ACTIVITIES.
3. REFER TO IMPROVEMENT PLANS FOR LIMITS OF IMPROVEMENT PRIOR TO COMMENCING DEMOLITION ACTIVITIES.
4. PROTECT ALL OFFSITE FEATURES NOT EXPRESSLY NOTED FOR DEMOLITION OR IMPROVEMENT ON THIS PLAN.
5. PROTECT ALL EXISTING TREES UNLESS OTHERWISE NOTES.
6. REFER TO ARCHITECTURAL PLAN FOR FINAL DEMOLITION OR REMOVAL OF BUILDINGS.

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Drawing Title
DEMOLITION PLAN

Job No.	Drawn
211085	LB
Scale	Date
PER PLAN	11/04/21

Sheet No.
C200



GRAPHIC SCALE

30 0 10 20 40 80

(IN FEET)

SITE IMPROVEMENT CONSTRUCTION NOTES:

1. CONSTRUCT 7.5" PCC OVER 6" AB PER DETAIL 6/ C600
2. CONSTRUCT 4" PCC OVER 4" AB PER GEOTECHNICAL REPORT BY GEOTEK, INC DATED JULY 15, 2021. SEE DETAIL 7/ C600
3. CONSTRUCT 4"AC/8" AB PER GEOTECHNICAL REPORT BY GEOTEK, INC DATED JULY 15, 2021. SEE DETAIL 5/ C600
4. CONSTRUCT LANDSCAPING PER LANDSCAPE PLANS
5. CONSTRUCT 8" CURB PER SPPWC STD. PLAN 120-2 (A=8)
6. CONSTRUCT 8" CURB WITH 24" GUTTER PER SPPWC STD. PLAN 120-2 (A=8)
7. CONSTRUCT CURB RAMP #1 SEE DETAIL 2/ C600
8. PAINT 8" WIDE PARKING STRIPING (COLOR PER ARCHITECTURAL PLAN)
9. INSTALL/PAINT CLEAN AIR VEHICLE STRIPING AND MARKINGS
10. ACCESSIBLE PARKING STALL STRIPING AND MARKINGS PER DETAIL X/XX
11. VAN ACCESSIBLE PARKING STALL STRIPING AND MARKINGS PER DETAIL X/XX
12. INSTALL ACCESSIBLE SIGNS (VAN SIGN WHERE APPLICABLE)
13. INSTALL WHEELSTOPS PER DETAIL 7/C600
14. PAINT PAVEMENT MARKINGS PER SPPWC STD. PLAN 131
15. PAINT CROSSWALK MARKINGS PER SPPWC STD. PLAN 7 (CONSPICUITY STRIPE)
16. NEW TRASH ENCLOSURE PER ARCHITECTURAL PLANS
17. NEW RETAINING WALL PER STRUCTURAL PLANS
18. NEW BUILDING PER ARCHITECTURAL PLANS
19. NEW FENCE PER ARCHITECTURAL PLANS
20. MATCH EXISTING CURB
21. MATCH EXISTING PCC SWALE
22. MATCH EXISTING PAVING
23. INSTALL/PAINT CLEAN AIR VEHICLE STRIPING AND MARKINGS PER ARCHITECTURAL PLANS
24. CONSTRUCT CURB RAMP #2 SEE DETAIL 3/ C600
25. CONSTRUCT EV CHARGING STATION PER ARCHITECTURAL PLANS
26. CARPORT PER ARCHITECTURAL PLANS
27. CONSTRUCT TYPE 1 CASE A CURB RAMP PER SPPWC STD PLAN 111-5
28. CONSTRUCT TYPE 2 CASE D CURB RAMP PER SPPWC STD PLAN 111-5
29. CONSTRUCT DECOMPOSED GRANITE PER ARCHITECTURAL PLANS
30. CONSTRUCT RAMP AND HANDRAILS PER ARCHITECTURAL PLANS
31. INSTALL STOP SIGN, STOP BAR, AND STRIPING

ABBREVIATIONS:

AC	ASPHALT CONCRETE PAVEMENT
BLDG	BUILDING
EG	EXISTING GRADE
FFE	FINISHED FLOOR ELEVATION
FS	FINISHED SURFACE
TC	TOP OF CURB
TYP	TYPICAL

LEGEND:

PROJECT LIMITS

HORIZONTAL CONTROL NOTES:

1. CONTRACTOR SHALL LAYOUT THE CONTROL FOR THE SITE AS SPECIFIED ON THIS SHEET. CONTRACTOR SHALL LAYOUT HARDSCAPE PER LANDSCAPE PLANS.
2. ALL DIMENSIONS ON THE PLANS ARE IN FEET OR DECIMALS THEREOF UNLESS SPECIFICALLY CALLED OUT AS FEET AND INCHES.
3. ALL DIMENSIONS ARE TO FACE OF CURB UNLESS OTHERWISE NOTED.
4. TRAFFIC STRIPING PER STANDARD PLANS AND SPECIFICATIONS FOR PUBLIC WORKS CONSTRUCTIONS (SPPWC).
5. ALONG THE ADA PATH OF TRAVEL, ALL CROSS SLOPES AND LONGITUDINAL SLOPES SHALL NOT EXCEED 2% AND 5%, RESPECTIVELY. UNLESS OTHERWISE NOTED.

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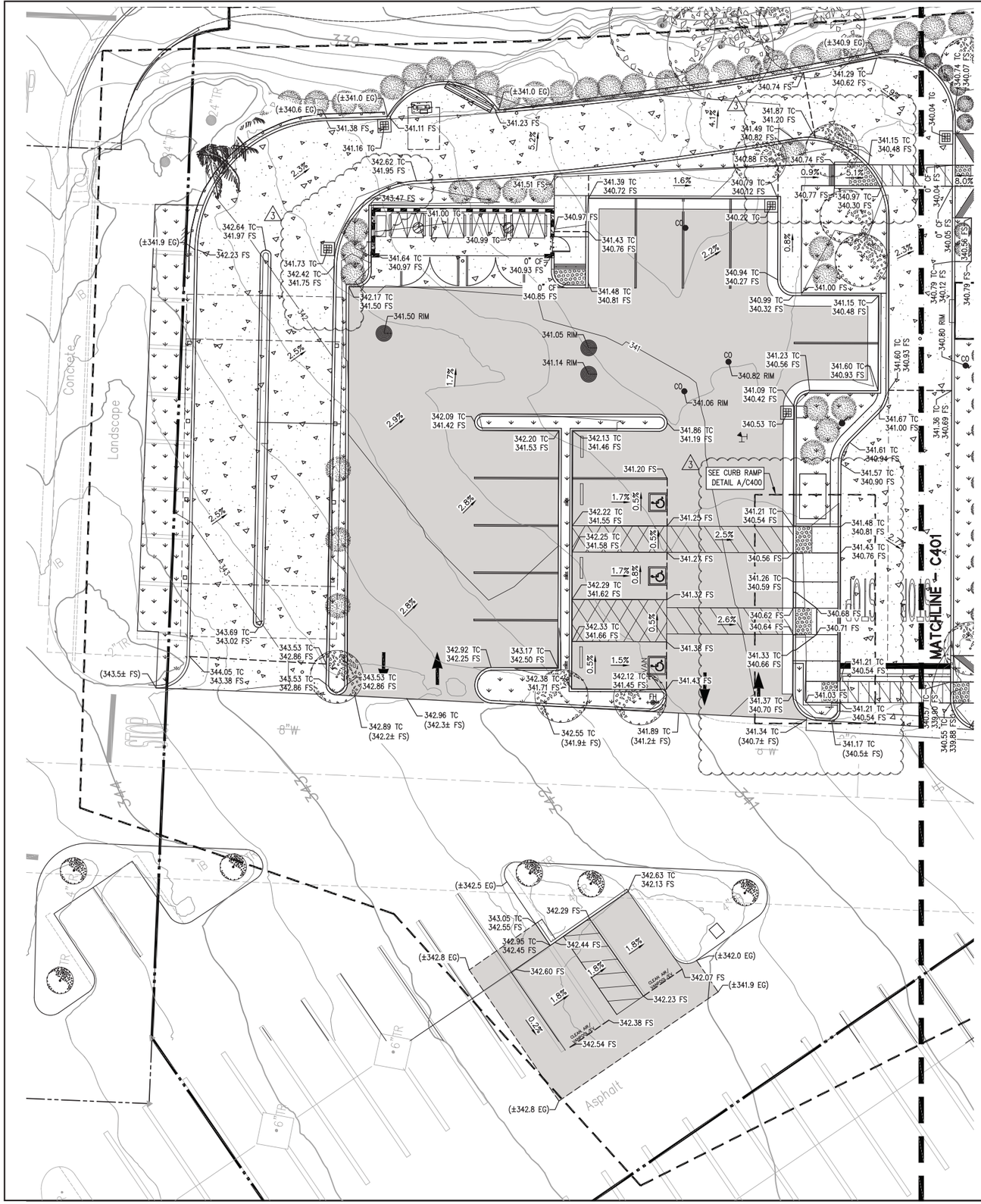
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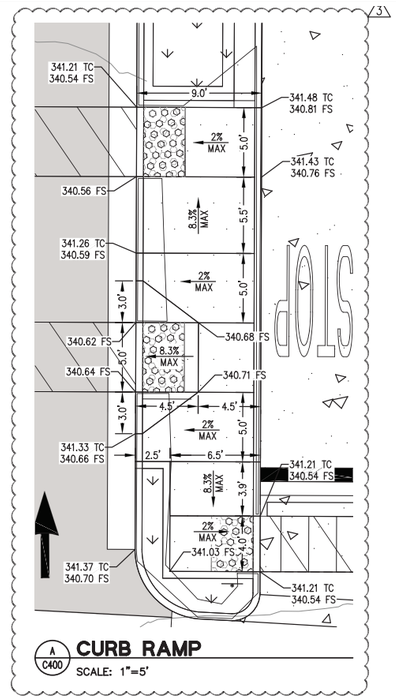
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Drawing Title
SITE IMPROVEMENTS PLANS

Job No.	Drawn
211085	LB
Scale	**Date**
PER PLAN	11/04/21

Sheet No.
C300





A C400 **CURB RAMP**
SCALE: 1"=5'

LEGEND:

- PROJECT LIMITS
- ℄
- GRADEBREAK

ABBREVIATIONS

AC	ASPHALT CONCRETE PAVEMENT
BLDG	BUILDING
EG	EXISTING GRADE
FFE	FINISHED FLOOR ELEVATION
FS	FINISHED SURFACE
℄	PROPERTY LINE
TC	TOP OF CURB
TYP	TYPICAL

GRADING NOTES:

1. TC ELEVATION SHOWN IS FOR 8" CURB HEIGHT UNLESS OTHERWISE NOTED ON PLAN.
2. ALL EXISTING UTILITY COVERS WITHIN LIMIT OF WORK ARE TO BE ADJUSTED TO GRADES SHOWN ON PLAN.
3. SEE LANDSCAPE PLANS FOR ALL GRADING IN LANDSCAPE AREAS AND FOR FINE GRADING.
4. FOR WALKS IN ADA ACCESSIBLE AREAS CROSS SLOPES SHOULD NOT EXCEED 2% GRADE.
5. REFER TO LANDSCAPE AND STRUCTURAL PLANS FOR WALL DETAILS.
6. CONTRACTOR SHALL SAWCUT AND REMOVE PORTION OF EXISTING CONCRETE TO CREATE STRAIGHT AND SMOOTH EDGE WHERE NEW CONCRETE JOINS TO EXISTING.
7. REFER TO LANDSCAPE IRRIGATION PLANS FOR DESIGN SPECIFICATIONS.
8. PER 2016 CBC 1804.4, THE FINISHED SURFACE IMMEDIATELY ADJACENT TO THE FOUNDATION SHALL SLOPE AWAY FROM THE BUILDING AT A MINIMUM OF 2% FOR IMPERVIOUS SURFACES AND 5% FOR PERVIOUS SURFACES.

DRAINAGE NOTES:

1. CONTRACTOR SHALL VERIFY EXISTING SEWER AND STORM DRAIN INVERTS PRIOR TO CONSTRUCTION AND SHALL NOTIFY CIVIL ENGINEER OF ANY ELEVATION DISCREPANCIES BASED ON THEIR FINDINGS.
2. EXISTING UTILITY DATA SHOWN ON THESE DRAWINGS ARE PER RECORD DRAWINGS. THE TYPE AND LOCATION OF THE UTILITIES SHOWN ON THESE DRAWINGS MAY HAVE CHANGED AND THERE MAY BE ADDITIONAL EXISTING UTILITIES NOT SHOWN.
3. ALL UTILITIES SHOWN ON THIS PLAN ARE PRELIMINARY UNTIL VERIFIED BY UTILITY AGENCIES.
4. THE CONTRACTOR SHALL COMMUNICATE DIRECTLY WITH THE UTILITY COMPANIES WHEN REQUESTING FACILITIES TO BE LOCATED, MARKED OR REPAIRED, NO EXCAVATIONS ARE PERMITTED UNTIL ALL UTILITIES ARE MARKED.
5. APPROVAL OF THIS PLAN BY CITY ENGINEER DOES NOT CONSTITUTE A REPRESENTATION OF THE ACCURACY OF THE LOCATION OF, OR THE EXISTENCE OR NON-EXISTENCE OF ANY UNDERGROUND UTILITY PIPES OR STRUCTURES WITHIN THE LIMITS OF THE PROJECT. IT SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR TO DETERMINE THE TRUE LOCATION OF ALL PUBLIC AND PRIVATE UTILITIES, AND FOR MAINTAINING SERVICE TO ANY INDIVIDUAL PROPERTY WHOSE UTILITY SERVICE MAY BE DAMAGED BY THE CONTRACTOR IN THE PERFORMANCE OF THE WORK.
6. IT SHALL BE THE CONTRACTOR'S RESPONSIBILITY TO VERIFY THE LOCATION OF ALL EXISTING UNDERGROUND UTILITIES (BY POTHOLING OR OTHER MEANS) AND TO COORDINATE THE RELOCATION OF ANY EXISTING UTILITIES DEEMED NECESSARY BY THE PROPOSED IMPROVEMENT. CONTRACTOR SHALL NOTIFY UNDERGROUND SERVICE ALERT (USA) 1-800-227-2600 AT LEAST 72 HOURS PRIOR TO ANY EXCAVATION TO LOCATE EXISTING UTILITIES.
7. REFER TO LANDSCAPE IRRIGATION PLANS FOR DESIGN SPECIFICATIONS.

GRAPHIC SCALE

10 0 5 10 20 40

(IN FEET)
1 inch = 10 ft.

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Amy's DRIVE THRU

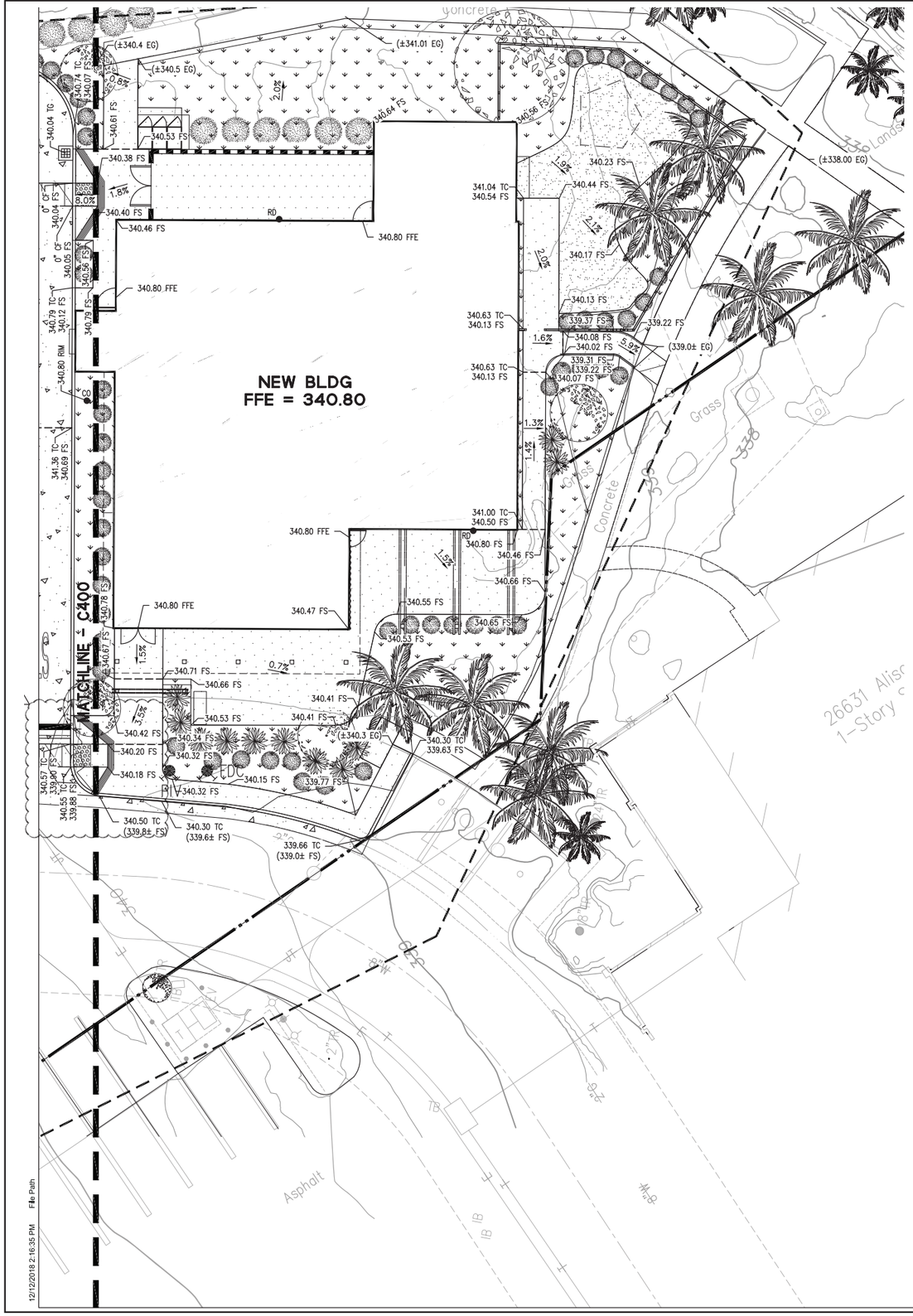
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REVISIONS

Drawing Title
GRADING & DRAINAGE PLAN

Job No.	Drawn
211085	LB
Scale	**Date**
PER PLAN	11/04/21

Sheet No.
C400



LEGEND:

- PROJECT LIMITS
- $\mathcal{L}$
- GRADEBREAK

ABBREVIATIONS

AC	ASPHALT CONCRETE PAVEMENT
BLDG	BUILDING
EG	EXISTING GRADE
FFE	FINISHED FLOOR ELEVATION
FS	FINISHED SURFACE
$\mathcal{L}$	PROPERTY LINE
TC	TOP OF CURB
TYP	TYPICAL

GRADING NOTES:

1. TC ELEVATION SHOWN IS FOR 8" CURB HEIGHT UNLESS OTHERWISE NOTED ON PLAN.
2. ALL EXISTING UTILITY COVERS WITHIN LIMIT OF WORK ARE TO BE ADJUSTED TO GRADES SHOWN ON PLAN.
3. SEE LANDSCAPE PLANS FOR ALL GRADING IN LANDSCAPE AREAS AND FOR FINE GRADING.
4. FOR WALKS IN ADA ACCESSIBLE AREAS CROSS SLOPES SHOULD NOT EXCEED 2% GRADE.
5. REFER TO LANDSCAPE AND STRUCTURAL PLANS FOR WALL DETAILS.
6. CONTRACTOR SHALL SAWCUT AND REMOVE PORTION OF EXISTING CONCRETE TO CREATE STRAIGHT AND SMOOTH EDGE WHERE NEW CONCRETE JOINS TO EXISTING.
7. REFER TO LANDSCAPE IRRIGATION PLANS FOR DESIGN SPECIFICATIONS.
8. PER 2016 CBC 1804.4, THE FINISHED SURFACE IMMEDIATELY ADJACENT TO THE FOUNDATION SHALL SLOPE AWAY FROM THE BUILDING AT A MINIMUM OF 2% FOR IMPERVIOUS SURFACES AND 5% FOR PERVIOUS SURFACES.

DRAINAGE NOTES:

1. CONTRACTOR SHALL VERIFY EXISTING SEWER AND STORM DRAIN INVERTS PRIOR TO CONSTRUCTION AND SHALL NOTIFY CIVIL ENGINEER OF ANY ELEVATION DISCREPANCIES BASED ON THEIR FINDINGS.
2. EXISTING UTILITY DATA SHOWN ON THESE DRAWINGS ARE PER RECORD DRAWINGS. THE TYPE AND LOCATION OF THE UTILITIES SHOWN ON THESE DRAWINGS MAY HAVE CHANGED AND THERE MAY BE ADDITIONAL EXISTING UTILITIES NOT SHOWN.
3. ALL UTILITIES SHOWN ON THIS PLAN ARE PRELIMINARY UNTIL VERIFIED BY UTILITY AGENCIES.
4. THE CONTRACTOR SHALL COMMUNICATE DIRECTLY WITH THE UTILITY COMPANIES WHEN REQUESTING FACILITIES TO BE LOCATED, MARKED OR REPAIRED, NO EXCAVATIONS ARE PERMITTED UNTIL ALL UTILITIES ARE MARKED.
5. APPROVAL OF THIS PLAN BY CITY ENGINEER DOES NOT CONSTITUTE A REPRESENTATION OF THE ACCURACY OF THE LOCATION OF, OR THE EXISTENCE OR NON-EXISTENCE OF ANY UNDERGROUND UTILITY PIPES OR STRUCTURES WITHIN THE LIMITS OF THE PROJECT. IT SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR TO DETERMINE THE TRUE LOCATION OF ALL PUBLIC AND PRIVATE UTILITIES, AND FOR MAINTAINING SERVICE TO ANY INDIVIDUAL PROPERTY WHOSE UTILITY SERVICE MAY BE DAMAGED BY THE CONTRACTOR IN THE PERFORMANCE OF THE WORK.
6. IT SHALL BE THE CONTRACTOR'S RESPONSIBILITY TO VERIFY THE LOCATION OF ALL EXISTING UNDERGROUND UTILITIES (BY POTHOLING OR OTHER MEANS) AND TO COORDINATE THE RELOCATION OF ANY EXISTING UTILITIES DEEMED NECESSARY BY THE PROPOSED IMPROVEMENT. CONTRACTOR SHALL NOTIFY UNDERGROUND SERVICE ALERT (USA) 1-800-227-2600 AT LEAST 72 HOURS PRIOR TO ANY EXCAVATION TO LOCATE EXISTING UTILITIES.
7. REFER TO LANDSCAPE IRRIGATION PLANS FOR DESIGN SPECIFICATIONS.

GRAPHIC SCALE

10 0 5 10 20 40

(IN FEET)
1 inch = 10 ft.

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Amy's DRIVE THRU

NO.	DATE	REMARKS
3	12/10/21	PLANNING COMMENTS
2	11/04/21	PLANNING COMMENTS
1	09/24/21	PLANNING COMMENTS
	06/16/21	PLANNING SUBMITTAL

REVISIONS

Drawing Title
GRADING & DRAINAGE PLAN

Job No.	Drawn
211085	LB
Scale	Date
PER PLAN	11/04/21

Sheet No.
C401

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COMPOSITE UTILITY CONSTRUCTION NOTES:

40 CONSTRUCT 18"X18" CONCRETE BOX WITH TRAFFIC RATED GRATE

41 CONSTRUCT 12" STORM DRAIN PIPE

42 CONSTRUCT 12" TRENCH DRAIN

43 CONSTRUCT WATER QUALITY UNDERGROUND BASIN (DETENTION SYSTEM) PER DETAIL 1, C600, C601, C602, 1/C603

44 CONSTRUCT MAXWELL DRYWELL SYSTEM

45 CONNECT TO EXISTING STORM DRAIN LINE

46 CONNECT TO EXISTING SEWER LINE

47 CONSTRUCT 6" SEWER LINE

48 CONSTRUCT SEWER CLEANOUT PER DETAIL 8/C600

49 NEW 1500 GALLON GREASE INTERCEPTOR (INSIDE DIMENSION 124"L X 71"W X 59"D) PER PLUMBING PLANS

50 SEWER POC TO BUILDING

51 NEW LOCATION OF RELOCATED FIRE WATER VAULT

52 CONSTRUCT 8" FIRE LINE

53 CONSTRUCT POST INDICATOR VALVE (PIV) PER DETAIL 2/C600

54 CONSTRUCT FIRE DEPARTMENT CONNECTION (FDC) PER DETAIL 9/C600

55 FIRE POC TO BUILDING

56 CONNECT TO EXISTING FIRE LATERAL

57 CONSTRUCT FIRE HYDRANT PER MNWD STD. W-7

58 CONNECT TO EXISTING WATER MAIN

59 CONNECT TO EXISTING WATER LATERAL

60 CONSTRUCT 3" WATER METER PER MNWD STD. W-4

61 CONSTRUCT THRUST BLOCKS PER MNWD STD. W-12

62 CONSTRUCT 3" WATER LINE. PIPE TRENCHING PER MNWD STD. W-11

63 CONSTRUCT 3" DOMESTIC BACKFLOW PREVENTION DEVICE PER MNWD STD. W-8

64 CONSTRUCT SHUTOFF VALVE PER MNWD STD. W-8

65 WATER POC TO BUILDING

66 ADJUST EXISTING UTILITY TO NEW GRADE

67 VERIFY LOCATION WITH LANDSCAPE PLANS, CONTINUE PER LANDSCAPE PLANS

68 CONSTRUCT 6" AREA DRAIN (TRAFFIC RATED) WITH P-TRAP

69 HOSE BIB POINT OF CONNECTION

ABBREVIATIONS

BLDG BUILDING
FDC FIRE DEPARTMENT CONNECTION
FH FIRE HYDRANT
INV INVERT
PIV POST INDICATOR VALVE
TG TOP OF GRATE
TYP. TYPICAL
WM WATER METER

LEGEND:

PROJECT LIMITS
FW FIRE WATER LINE
DW DOMESTIC WATER LINE
SS SANITARY SEWER LINE
STORM DRAIN LINE
T TELECOM LINE
C CATV LINE
E ELECTRICAL LINE
G GAS LINE
CO CLEANOUT
DS ROOF DOWNSPOUT
MANHOLE
FH FIRE HYDRANT
CATCH BASIN
JUNCTION STRUCTURE
WM WATER METER
WV WATER VALVE

UTILITY NOTES:

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(IN FEET)
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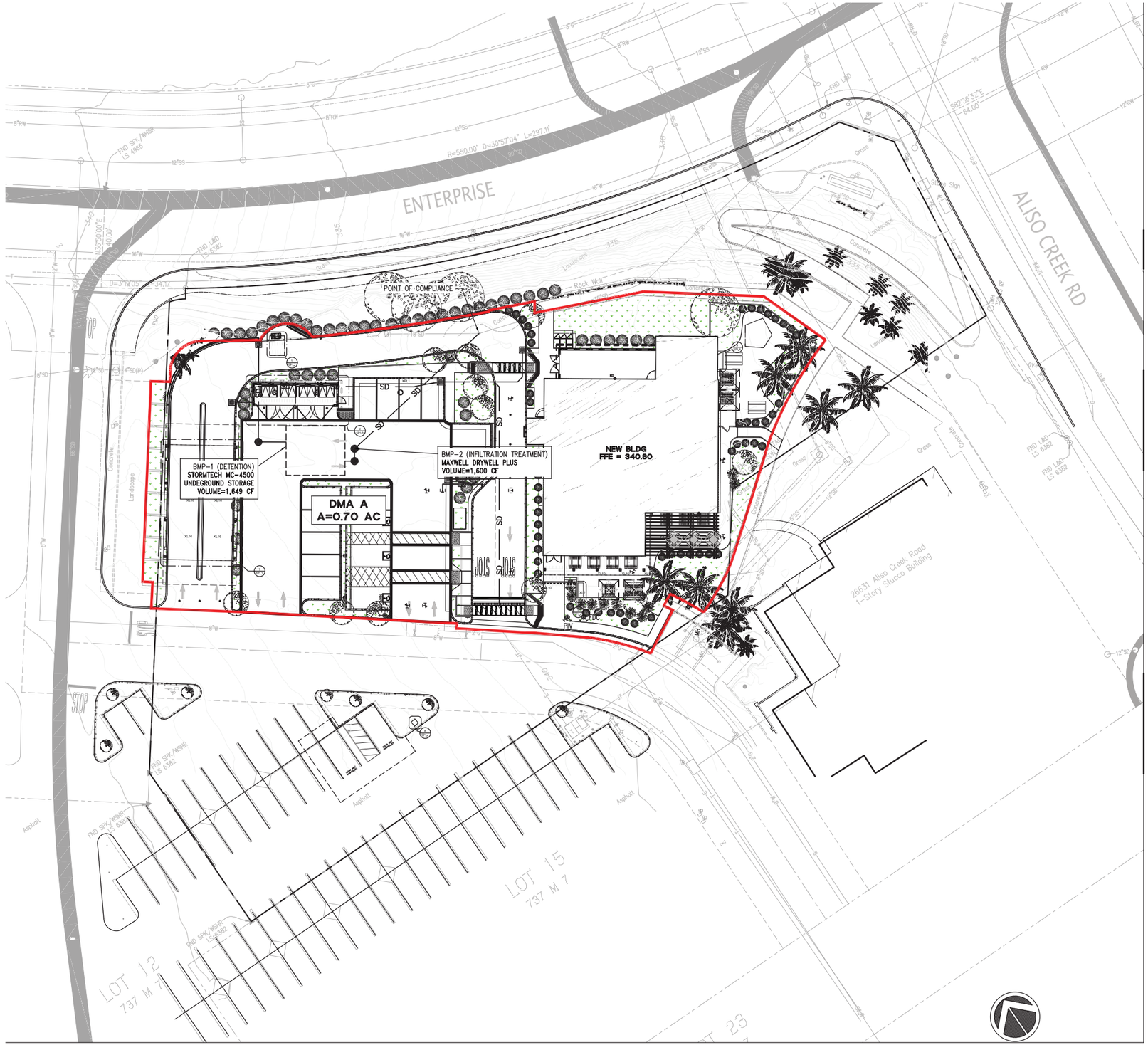
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3	09/24/21	PLANNING COMMENTS
2	06/16/21	PLANNING SUBMITTAL

REVISIONS

Drawing Title
COMPOSITE UTILITY PLAN

Job No. 211085
Drawn LB
Scale PER PLAN
Date 11/04/21

Sheet No.
C500



LEGEND:

DMA BOUNDARY

STORM DRAIN LINE

LANDSCAPE AREA

SITE INFORMATION

TOTAL AREA = 0.70 ACRES
PERVIOUS AREA = 0.15 ACRES
IMPERVIOUS AREA = 0.55 ACRES

PER GEOTECH REPORT
FOUND INFILTRATION RATE = 1.14 TO 1.26 IN/HR

DCV CALCULATION

Worksheet 5: Simple Design Capture Volume Sizing Method for Full Infiltration BMPs

Part 1: Calculate the DCV				
			DMA A	
1	Enter design capture storm depth, *d* (inches)	d=	0.80	inches
2a	Enter the combined effect of provided HSCs, d_{HSC} (inches) (based on Worksheet 4) including any other upstream BMPs	d_{HSC}=	0.00	Inches
2b	Calculate the remainder of the design capture storm depth, $d_{remainder} = d - d_{HSC}$	$d_{remainder}$ =	0.80	inches
3a	Enter DMA area tributary to BMP(s), *A* (acres) excluding any self-retaining areas	A=	0.7	acres
3b	Enter DMA Imperviousness, imp (unitless) after removal of self-retaining areas	imp=	0.80	
3c	Calculate runoff coefficient, *C= (0.75 x imp) + 0.15*	C=	0.75	
3d	Calculate runoff volume, *DCV = (C x $d_{remainder}$ x A x 43560 x (1/12)) (See Section E.2.2)*	DCV=	1,525	cu-ft

TREATMENT SUMMARY

DRAINAGE MANAGEMENT AREA	AREA (ACRES)	LID BMP USED	DCV (CU-FT)	TREATMENT PROVIDED (CU-FT)
DMA A	0.70	UNDERGROUND CHAMBERS (BMP#1)	1,525	1,649
DMA A	0.70	DRY WELL (BMP#2)	1,525	1,600

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REVISIONS

Drawing Title
WQMP
SITE PLAN
EXHIBIT

Job No. 211085
Drawn LB
Scale PER PLAN
Date 11/04/21

Sheet No.
C600

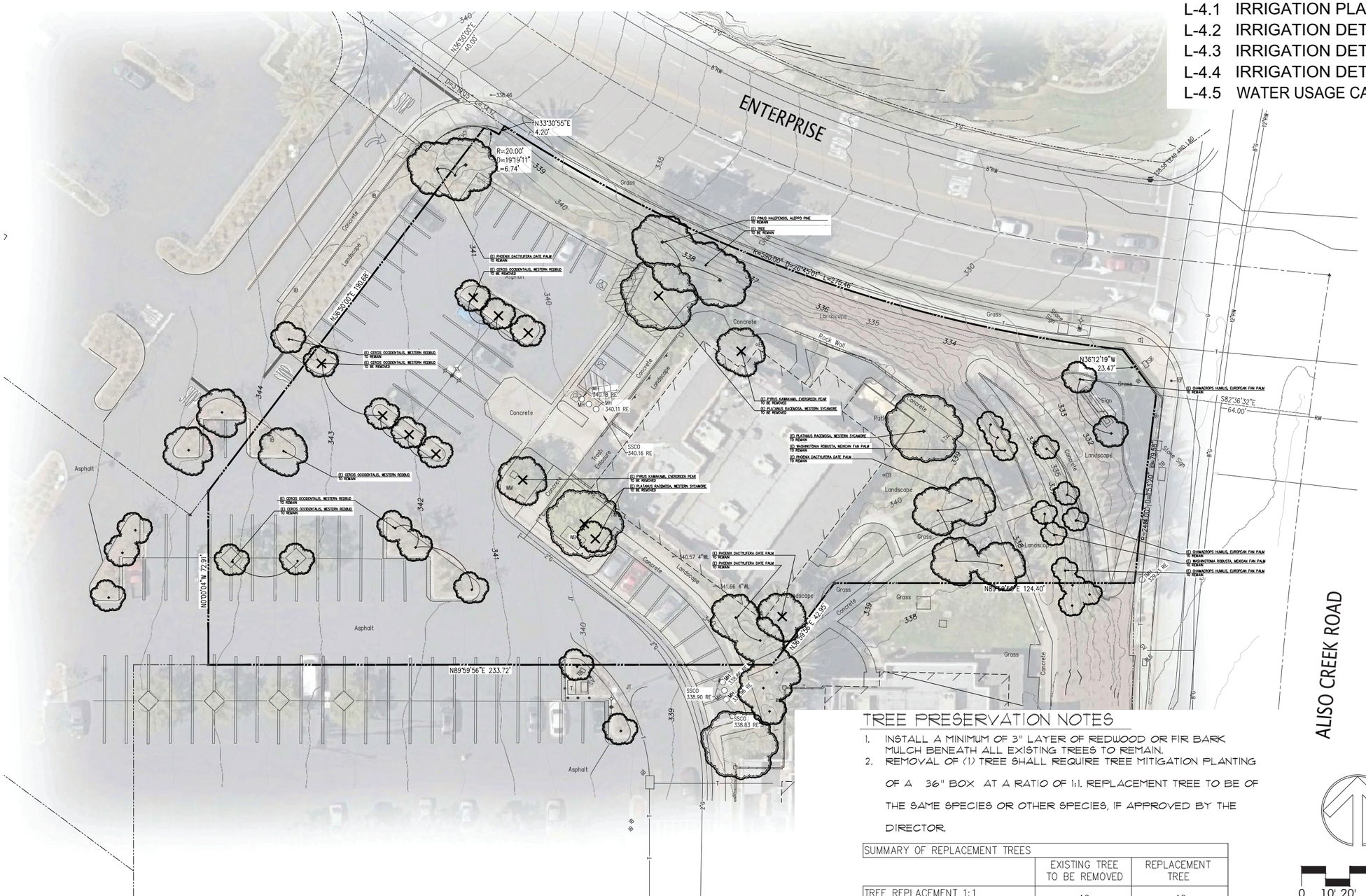
AMY'S DRIVE THRU

26641 ALISO VIEJO ROAD, ALISO VIEJO, CA

LANDSCAPE PLANS FOR ENTITLEMENT SUBMITTAL

SHEET INDEX

L-1.0 LANDSCAPE COVER & TREE REMOVAL PLAN
L-2.0 LANDSCAPE PLAN
L-3.0 PLANT PALETTE, PLANTING NOTES, & PLANT IMAGES
L-4.0 IRRIGATION NOTES & LEGEND
L-4.1 IRRIGATION PLAN
L-4.2 IRRIGATION DETAILS
L-4.3 IRRIGATION DETAILS
L-4.4 IRRIGATION DETAILS
L-4.5 WATER USAGE CALCULATIONS



TREE PRESERVATION NOTES

1. INSTALL A MINIMUM OF 3" LAYER OF REDWOOD OR FIR BARK MULCH BENEATH ALL EXISTING TREES TO REMAIN.
2. REMOVAL OF (1) TREE SHALL REQUIRE TREE MITIGATION PLANTING OF A 36" BOX AT A RATIO OF 1:1. REPLACEMENT TREE TO BE OF THE SAME SPECIES OR OTHER SPECIES, IF APPROVED BY THE DIRECTOR.

SUMMARY OF REPLACEMENT TREES		
	EXISTING TREE TO BE REMOVED	REPLACEMENT TREE
TREE REPLACEMENT 1:1 MINIMUM 36" BOX SIZE	12	12

0 10' 20' 40' 60'

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REVISIONS

Drawing Title
LANDSCAPE COVER & TREE REMOVAL PLAN

Job No.	Drawn
21-026	RA

Scale	Date
PER PLAN	11/04/21

Sheet No.
L-1.0

LANDSCAPE STATISTIC

1. NET PROJECT AREA = 58,590 SF
2. BUILDING AREA = 5476 SF
3. INTERIOR LANDSCAPE WITHIN PARKING AREAS = 1,171 SF, 51.6%
   PARKING AREAS = 22,370 SF
   (NOTE: MINIMUM OF 2.5% REQUIRED)
4. INTERIOR LANDSCAPE WITHIN NON PARKING AREAS = 13,416 SF, 51.6%
   NET PROJECT AREA NON-PARKING AREAS = 25,957 SF
   (NOTE: MINIMUM OF 2.5% REQUIRED)
5. BOUNDARY LANDSCAPE = 3,839 SF
   MINIMUM AVERAGE DEPTH = 20 FT
   (NOTE: MINIMUM AVERAGE DEPTH OF 10 FEET REQUIRED)
6. DROUGHT TOLERANT LANDSCAPE PERCENTAGE OF LANDSCAPE THAT IS LOW OR MODERATELY DROUGHT TOLERANT = 95%

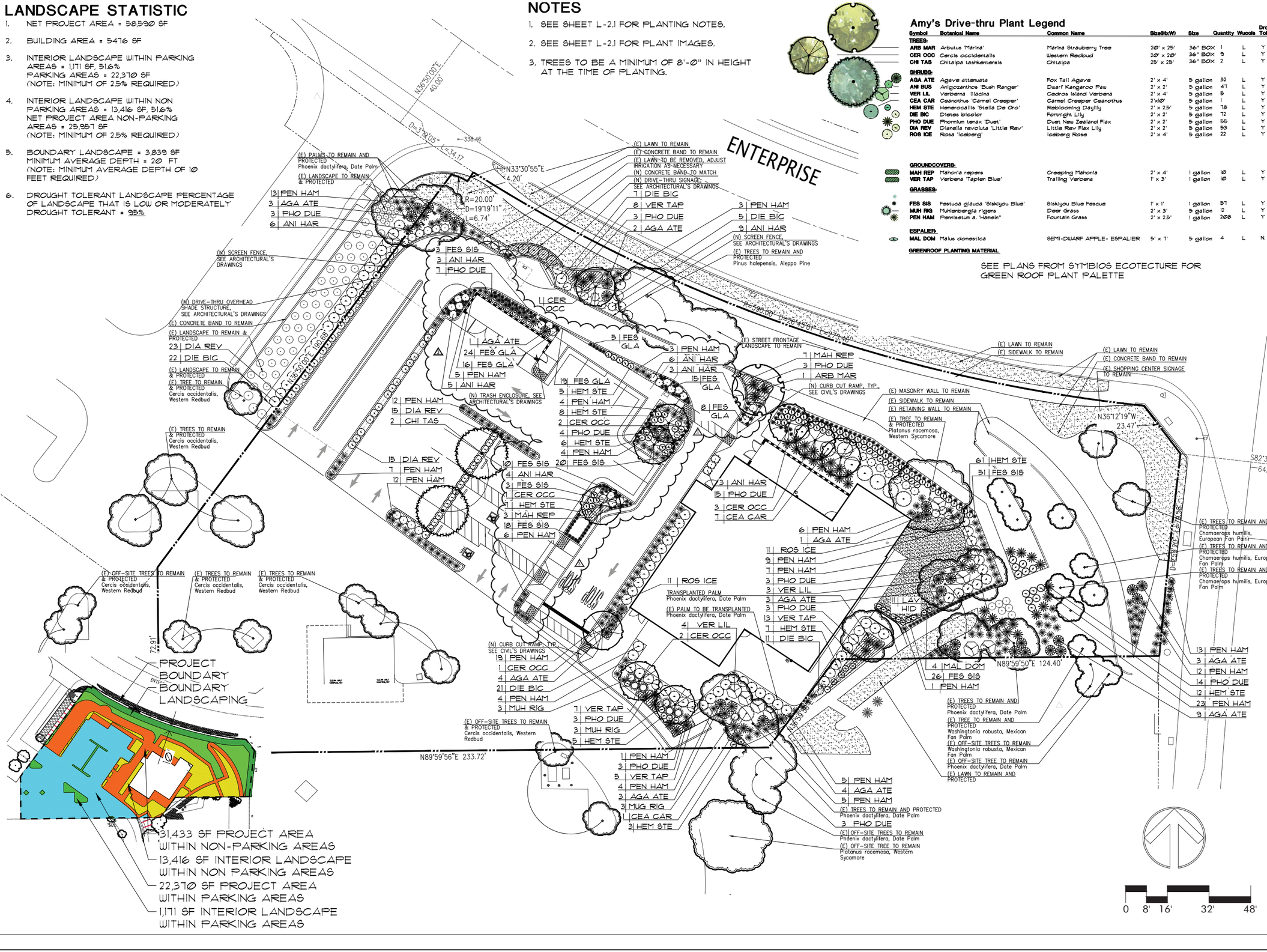
NOTES

1. SEE SHEET L-2.1 FOR PLANTING NOTES.
2. SEE SHEET L-2.1 FOR PLANT IMAGES.
3. TREES TO BE A MINIMUM OF 8'-Ø" IN HEIGHT AT THE TIME OF PLANTING.

Amy's Drive-thru Plant Legend

Symbol	Botanical Name	Common Name	Size@tx(W)	Size	Quantity	Wucols	Drought Tolerant
TREES:							
ARB MAR	Arbutus 'Marina'	Marina Strawberry Tree	20' x 25'	36" BOX	1	L	Y
CER OCC	Cercis occidentalis	Western Redbud	20' x 20'	36" BOX	9	L	Y
CHI TAS	Chitalpa tashkentensis	Chitalpa	25' x 25'	36" BOX	2	L	Y
SHRUBS:							
AGA ATE	Agave attenuata	Fox Tail Agave	2' x 4'	5 gallon	32	L	Y
ANI BUS	Anigozanthos 'Bush Ranger'	Dwarf Kangaroo Paw	2' x 2'	5 gallon	47	L	Y
VER LIL	Verbena lilacina	Cedros Island Verbena	2' x 4'	5 gallon	5	L	Y
CEA CAR	Ceanothus 'Carmel Creeper'	Carmel Creeper Ceanothus	2'x10'	5 gallon	1	L	Y
HEM STE	Hemerocallis 'Stella De Oro'	Reblooming Daylily	2' x 2.5'	5 gallon	78	L	Y
DIE BIC	Dietes bicolor	Fortnight Lily	2' x 2'	5 gallon	72	L	Y
PHO DUE	Phormium tenax 'Duet'	Duet New Zealand Flax	2' x 2'	5 gallon	55	L	Y
DIA REV	Dianella revoluta 'Little Rev'	Little Rev Flax Lily	2' x 2'	5 gallon	53	L	Y
ROS ICE	Rosa 'Iceberg'	Iceberg Rose	2' x 4'	5 gallon	22	L	Y
GROUNDCOVERS:							
MAH REP	Mahonia repens	Creeping Mahonia	2' x 4'	1 gallon	10	L	Y
VER TAP	Verbena 'Tapien Blue'	Trailing Verbena	1' x 3'	1 gallon	10	L	Y
GRASSES:							
FES SIS	Festuca glauca 'Siskiyou Blue'	Siskiyou Blue Fescue	1' x 1'	1 gallon	57	L	Y
MUH RIG	Muhlenbergia rigens	Deer Grass	2' x 3'	5 gallon	12	L	Y
PEN HAM	Pennisetum a. 'Hamelin'	Fountain Grass	2' x 2.5'	1 gallon	208	L	Y
ESPALIER:							
MAL DOM	Malus domestica	SEMI-DWARF APPLE- ESPALIER	5' x 1'	5 gallon	4	L	N
GREENROOF PLANTING MATERIAL							

SEE PLANS FROM SYMBIOS ECOTECTURE FOR GREEN ROOF PLANT PALETTE



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REVISIONS

Drawing Title: LANDSCAPE PLAN

Job No.	Drawn
21-026	RA

Scale	Date
1/16" = 1'-0"	11/04/21

Sheet No. L-2.0

TREES



Arbutus 'Marina'
Marina Strawberry Tree



Cercis occidentalis
Western Redbud



Chitalpa tashkentensis
Chitalpa

SHRUBS



Agave attenuata
Fox Tail Agave



Anigozanthos 'Bush Ranger'
Dwarf Kangaroo Paw



Verbena lilicina
Cedros Island Verbena

SHRUBS CONT.



Ceanothus thyrsiflorus var. griseus 'Carmel Creeper'
Carmel Ceanothus



Hemerocallis 'Stella de Oro'
Reblooming Daylily



Dietes bicolor
Fortnight Lily



Phormium tenax 'Jack Spratt'
Jack Spratt New Zealand Flax



Phormium tenax 'Duet'
Duet New Zealand Flax

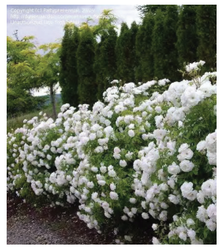
SHRUBS CONT.



Dianella revoluta 'Little Rev'
Little Rev Flax Lily



Nandina domestica 'Harbor Dwarf'
Harbor Dwarf Nandina



Rosa 'Iceberg'
Iceberg Rose

GROUNDCOVERS



Mahonia repens
Creeping Mahonia



Lantana montevidensis
Trailing Lantana

GRASSES



Festuca glauca
Blue Fescue



Muhlenbergia rigens
Deer Grass



Pennisetum alopecuroides 'Hameln'
Fountain Grass

GREEN ROOF PLANT MATERIAL

SEE PLANS FROM SYMBIOS ECOTECTURE FOR GREEN ROOF PLANT PALETTE

PLANTING NOTES

1. The scope of work includes furnishing all materials necessary for the installation of the planting, backfill, irrigation and drainage work outlined in these drawings. All work shall be performed by persons familiar with planting work and under supervision of a qualified planting foreman.
2. Plant material locations are diagramatic and may be subject to change by the landscape architect before the maintenance period begins.
3. All trees to be staked as shown in the tree planting detail.
4. Contractor shall ensure trees do not conflict with utilities.
5. If a discrepancy between these plans and actual on-site conditions occurs, the Landscape Contractor is to notify the Landscape Architect immediately, before proceeding with his work, for a decision.
6. All plants will be inspected for acceptable form and condition by Landscape Architect. Unacceptable plants will be replaced by the Landscape Contractor at no additional cost to the owner. All plants shall be tagged with the name of the plant in accordance with the standards of practice recommended by the American Association of Nurserymen. In all cases, botanical names shall take precedence over common names.
7. All work shall be performed by persons familiar with planting work and under supervision of a qualified planting foreman.
8. Plant material locations are diagrammatic and may be subject to change by the landscape architect before the maintenance period begins.
9. All plants brought onto the site shall be watered and protected from excessive wind, sun, frost, physical damage and theft until planted.
10. Landscape Architect shall be notified at least two working days prior to estimated time of setting out plants so a mutually acceptable time can be scheduled for final plant placement. All plants shall be placed in approximate locations shown on plans by Landscape Contractor prior to arrival of Landscape Architect. Final adjustments of locations shall be made by Landscape Architect.
11. The Landscape Architect reserves the right to make deletions, additions or substitutions in the field as necessary with adjustments in the contract as appropriate.
12. Prior to commencement of planting procedures, soil must be inspected for the following:
    a. Rough Grading: such that all stones over 1" diameter and pockets of road base, asphalt, gravel and concrete have been removed and planting areas slope toward drains and away from structures.
    b. Amendment: amendments have been incorporated into the soil per the soils test.
    c. Weeds: all weeds have been removed from all planting areas and pernicious weeds have been treated with appropriate herbicides or approved equal.
7. All asphalt, base course and other debris are to be removed completely below planting areas. Contractor is responsible for supplying top soil as necessary for all planting areas.

It shall be the Landscape Contractor's responsibility to provide adequate drainage of all plantings, sufficient to insure healthy growth.

8. All trees to be staked as shown in the tree planting detail.
9. Contractor shall ensure trees do not conflict with utilities.
10. Mulch all planting areas with 3 inch deep layer of Fir or Redwood walk on bark mulch except where only groundcover occurs, depth shall be 2 inches.
11. After planting has been approved by Landscape Architect, all plant tags are to be removed.
12. Dig planting pits 3 times the width of tree rootball and 2 times the width of shrub root ball. Backfill pits with 70% native on-site soil and 30% nitrolized shavings or equivilant.

    Backfill:
    70% native soil by volume
    30% nitrolized shavings or equivilant
    16 lbs. gro-power plus, per cubic yard mix
    other amendments per soil analysis
    grow-power planting tablets
13. An automatic low water use irrigation system is to be provided to water all planting areas which shall comply with MWELO. Landscape Contractor is to provide adequate coverage for all indicated planting areas prior to plant installation.

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REVISIONS

Drawing Title
PLANTING NOTES & PLANT IMAGES

Job No.	Drawn
21-026	RA
Scale	Date
NTS	11/04/21

Sheet No.
L-3.0

IRRIGATION NOTES

1. THESE IRRIGATION DRAWINGS ARE DIAGRAMMATIC AND INDICATIVE OF THE WORK TO BE INSTALLED. ALL PIPING, VALVES, AND OTHER IRRIGATION COMPONENTS MAY BE SHOWN WITHIN PAVED AREAS FOR GRAPHIC CLARITY ONLY AND ARE TO BE INSTALLED WITHIN PLANTING AREAS. DUE TO THE SCALE OF THE DRAWINGS, IT IS NOT POSSIBLE TO INDICATE ALL OFFSETS, FITTINGS, SLEEVES, CONDUIT, AND OTHER ITEMS WHICH MAY BE REQUIRED. INVESTIGATE THE STRUCTURAL AND FINISHED CONDITION AFFECTING THE CONTRACT WORK INCLUDING OBSTRUCTIONS, GRADE DIFFERENCES OR AREA DIMENSIONAL DIFFERENCES. IN THE EVENT OF FIELD DISCREPANCY WITH CONTRACT DOCUMENTS, PLAN THE INSTALLATION WORK ACCORDINGLY BY NOTIFICATION AND APPROVAL OF THE OWNER'S AUTHORIZED REPRESENTATIVE AND ACCORDING TO THE CONTRACT SPECIFICATIONS. NOTIFY AND COORDINATE IRRIGATION CONTRACT WORK WITH APPLICABLE CONTRACTORS FOR THE LOCATION AND INSTALLATION OF PIPE, CONDUIT OR SLEEVES THROUGH OR UNDER WALLS, ROADWAYS, PAVING AND STRUCTURES BEFORE CONSTRUCTION. IN THE EVENT THESE NOTIFICATIONS ARE NOT PERFORMED, THE CONTRACTOR ASSUMES FULL RESPONSIBILITY FOR REQUIRED REVISIONS.

2. THE CONTRACTOR SHALL COMPLY WITH ALL APPLICABLE CODES, STANDARDS, AND REGULATIONS. ALL WORK AND MATERIALS SHALL BE IN FULL ACCORDANCE WITH THE LATEST RULES AND REGULATIONS OF THE NATIONAL ELECTRIC CODE; THE UNIFORM PLUMBING CODE, PUBLISHED BY THE WESTERN PLUMBING OFFICIALS ASSOCIATION; AND OTHER STATE OR LOCAL LAWS OR REGULATIONS. NOTHING IN THESE DRAWINGS IS TO BE CONSTRUED TO PERMIT WORK NOT CONFORMING TO THESE CODES OR REGULATIONS. THE CONTRACTOR SHALL FURNISH WITHOUT ANY EXTRA CHARGE, ANY ADDITIONAL MATERIAL AND LABOR WHEN REQUIRED BY THE COMPLIANCE WITH THESE CODES AND REGULATIONS.

3. THE CONTRACTOR SHALL COORDINATE INSTALLATION OF IRRIGATION SYSTEM WITH LAYOUT AND INSTALLATION OF THE PLANT MATERIALS TO INSURE THAT THERE WILL BE COMPLETE AND UNIFORM IRRIGATION COVERAGE OF PLANTING IN ACCORDANCE WITH THESE DRAWINGS, AND CONTRACT DOCUMENTS. THE IRRIGATION LAYOUT SHALL BE CHECKED BY THE CONTRACTOR AND OWNER'S AUTHORIZED REPRESENTATIVE PRIOR TO CONSTRUCTION TO DETERMINE IF ANY CHANGES, DELETIONS, OR ADDITIONS ARE REQUIRED. IRRIGATION SYSTEM SHALL BE INSTALLED AND TESTED PRIOR TO INSTALLATION OF PLANT MATERIAL.

4. THE INTENT OF THIS IRRIGATION SYSTEM IS TO PROVIDE THE MINIMUM AMOUNT OF WATER REQUIRED TO SUSTAIN GOOD PLANT HEALTH.

5. IT IS THE RESPONSIBILITY OF THE MAINTENANCE CONTRACTOR AND/OR OWNER TO PROGRAM THE IRRIGATION CONTROLLER(S) TO PROVIDE THE MINIMUM AMOUNT OF WATER NEEDED TO SUSTAIN GOOD PLANT HEALTH. THIS INCLUDES MAKING ADJUSTMENTS TO THE PROGRAM FOR SEASONAL WEATHER CHANGES, PLANT MATERIAL, WATER REQUIREMENTS, MOUNDS, SLOPES, SUN, SHADE AND WIND EXPOSURE.

6. IT IS THE RESPONSIBILITY OF A LICENSED ELECTRICAL CONTRACTOR TO PROVIDE 120 VOLT A.C. (2.5 AMP DEMAND PER CONTROLLER) ELECTRICAL SERVICE TO THE CONTROLLER LOCATION(S). IT IS THE RESPONSIBILITY OF THE IRRIGATION CONTRACTOR TO COORDINATE THE ELECTRICAL SERVICE STUB-OUT TO THE CONTROLLER(S). PROVIDE PROPER GROUNDING PER CONTROLLER MANUFACTURER'S INSTRUCTIONS AND IN ACCORDANCE WITH LOCAL CODES.

7. PROVIDE EACH IRRIGATION CONTROLLER WITH ITS OWN INDEPENDENT LOW VOLTAGE COMMON GROUND WIRE.

8. SCHEDULE A MEETING WHICH INCLUDES REPRESENTATIVES OF THE IRRIGATION CONTROLLER MANUFACTURER, THE MAINTENANCE CONTRACTOR, THE OWNER AND THE IRRIGATION CONTRACTOR AT THE SITE FOR INSTRUCTION ON THE PROPER PROGRAMMING AND OPERATION OF THE IRRIGATION CONTROLLER.

9. IRRIGATION CONTROL WIRES: SOLID COPPER WITH U.L. APPROVAL FOR DIRECT BURIAL IN GROUND. COMMON GROUND WIRE: SIZE #12-1 WIRE WITH A WHITE INSULATING JACKET. CONTROL WIRE SERVICING REMOTE CONTROL VALVES: SIZE #14-1 WIRE WITH INSULATING JACKET OF COLOR OTHER THAN WHITE. SPLICES SHALL BE MADE WITH 3M-DBY SEAL PACKS OR APPROVED EQUAL.

10. INSTALL TWO SPARE CONTROL WIRES OF A DIFFERENT COLOR ALONG THE ENTIRE MAIN LINE. LOOP 36" EXCESS WIRE INTO EACH SINGLE VALVE BOX AND INTO ONE VALVE BOX IN EACH GROUP OF VALVES.

11. SPLICING OF LOW VOLTAGE WIRES IS PERMITTED IN VALVE BOXES ONLY. LEAVE A 36" LONG, 1" DIAMETER COIL OF EXCESS WIRE AT EACH SPLICE AND A 36" LONG EXPANSION LOOP EVERY 100 FEET ALONG WIRE RUN. TAPE WIRES TOGETHER EVERY TEN FEET. DO NOT TAPE WIRES TOGETHER WHERE CONTAINED WITHIN SLEEVING OR CONDUIT.

12. INSTALL BLACK PLASTIC VALVE BOXES WITH BOLT DOWN, NON HINGED COVER MARKED "IRRIGATION". BOX BODY SHALL HAVE KNOCK OUTS. ACCEPTABLE VALVE BOX MANUFACTURER'S INCLUDE NDS, CARSON OR APPROVED EQUAL.

13. VALVE LOCATIONS SHOWN ARE DIAGRAMMATIC. INSTALL IN GROUND COVER/SHRUB AREAS.

14. FLUSH AND ADJUST IRRIGATION OUTLETS AND NOZZLES FOR OPTIMUM PERFORMANCE AND TO PREVENT OVER SPRAY ONTO WALKS, ROADWAYS, AND/OR BUILDINGS. SELECT BEST DEGREE OF ARC AND RADIUS TO FIT THE EXISTING SITE CONDITIONS AND THROTTLE THE FLOW CONTROL AT EACH VALVE TO OBTAIN THE OPTIMUM OPERATING PRESSURE FOR EACH CONTROL ZONE.

15. SET SPRINKLER HEADS PERPENDICULAR TO FINISH GRADE.

16. INSTALL A HUNTER HCV SERIES, KBI CV SERIES, OR APPROVED EQUAL SPRING LOADED CHECK VALVE WHERE LOW OUTLET DRAINAGE WILL CAUSE EROSION AND/OR EXCESS WATER.

17. WHERE IT IS NECESSARY TO EXCAVATE ADJACENT TO EXISTING TREES, USE CAUTION TO AVOID INJURY TO TREES AND TREE ROOTS. EXCAVATE BY HAND IN AREAS WHERE TWO (2) INCH AND LARGER ROOTS OCCUR. BACK FILL TRENCHES ADJACENT TO TREE WITHIN TWENTY-FOUR (24) HOURS. WHERE THIS IS NOT POSSIBLE, SHADE THE SIDE OF THE TRENCH ADJACENT TO THE TREE WITH WET BURLAP OR CANVAS.

18. THE IRRIGATION SYSTEM DESIGN IS BASED ON THE MINIMUM OPERATING PRESSURE SHOWN ON THE IRRIGATION DRAWINGS. VERIFY WATER PRESSURE PRIOR TO CONSTRUCTION. REPORT ANY DIFFERENCE BETWEEN THE WATER PRESSURE INDICATED ON THE DRAWINGS AND THE ACTUAL PRESSURE READING AT THE IRRIGATION POINT OF CONNECTION TO THE OWNER'S AUTHORIZED REPRESENTATIVE.

19. IRRIGATION DEMAND: REFER TO PLANS.

20. PIPE SIZING SHOWN ON THE DRAWINGS IS TYPICAL. AS CHANGES IN LAYOUT OCCUR DURING STAKING AND CONSTRUCTION THE SIZE MAY NEED TO BE ADJUSTED ACCORDINGLY.

21. PIPE THREAD SEALANT COMPOUND SHALL BE RECTOR SEAL #5.

22. THE LANDSCAPE CONTRACTOR SHALL BE RESPONSIBLE FOR MINOR CHANGES IN THE IRRIGATION LAYOUT DUE TO OBSTRUCTIONS NOT SHOWN ON THE IRRIGATION DRAWINGS SUCH AS LIGHTS, FIRE HYDRANTS, SIGNS, ELECTRICAL ENCLOSURES, ETC.

23. THE LANDSCAPE CONTRACTOR SHALL BE RESPONSIBLE FOR CHANGES IN THE IRRIGATION LAYOUT AND VALVE ZONING DUE TO VARIATIONS IN THE EXISTING SITE CONDITIONS SUCH AS EXPOSURE FROM BUILDINGS, TRELLISES, TREES, ETC., AS WELL AS SLOPE AND SOIL CONDITIONS. THE CONTRACTOR SHALL NOTIFY THE LANDSCAPE ARCHITECT AND IRRIGATION CONSULTANT OF THE PROPOSED CHANGES PRIOR TO INSTALLATION FOR APPROVAL.

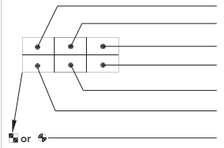
24. WHEN WORK OF THIS SECTION HAS BEEN COMPLETED AND SUCH OTHER TIMES AS MAY BE DIRECTED, REMOVE ALL TRASH, DEBRIS, SURPLUS MATERIALS AND EQUIPMENT FROM SITE.

25. CONTRACTOR SHALL BE RESPONSIBLE FOR SUPPLEMENTAL HAND WATERING OF ALL PLANT MATERIAL WITHIN DRIPLINE AREAS UNTIL THE PLANTS ARE SUFFICIENTLY ESTABLISHED.

26. VERIFY LOCATIONS OF ALL IRRIGATION COMPONENTS INSTALLED WITHIN A VALVE BOX WITH LANDSCAPE ARCHITECT PRIOR TO INSTALLATION. DO NOT INSTALL UNTIL LANDSCAPE ARCHITECT PROVIDES ACCEPTABLE LOCATIONS.

IRRIGATION LEGEND

SYMBOL	MODEL NUMBER	DESCRIPTION	NOZZLE GPM	OPERATING PSI	OPERATING RADIUS (FEET)
■	DB-15-PC-CV-E	TORO BUBBLER, MIN. 2 PER TREE. REFER TO BUBBLER DETAIL FOR QUANTITY OF BUBBLERS PER TREE SIZE.	0.25	30	TRICKLE
	T-YD-500-34	TORO DRIPLINE AIR RELIEF VALVE			
	WLT-0500-T	NDS SCH 40 BALL VALVE OR APPROVED EQUAL			
	570-DRIP-IND	TORO POP-UP DRIPLINE INDICATOR WITH SIDE INLET.			
	P-220-26 SERIES RWSG-KIT	TORO REMOTE CONTROL VALVE			
	DZK-700-MF RWSG-KIT	TORO DRIP ZONE KIT WITH IRRITROL 700 SERIES REMOTE CONTROL VALVE, PRESSURE REGULATOR (40 PSI) AND A 1" FILTER			
	33-DNP	RAIN BIRD 3/4" TWO-PIECE QUICK COUPLING VALVE (PURPLE LOCKING RUBBER COVER)			
	LGT-XX-SS	LEEMCO STAINLESS STEEL GATE VALVE (LINE SIZE)			
	975XL2SEU-1"/ VIT SBBC-22AL/ PBB-20	WILKINS REDUCED PRESSURE BACKFLOW ASSEMBLY WITH VIT STRONGBOX ALUMINUM ENCLOSURE AND FREEZE BLANKET.			
MV	WT-MV-100G-SNO	WeatherTRAK 1" BRASS MASTER VALVE (NORMALLY OPEN)			
FS	WTFLOW-HD-P-100	WeatherTRAK 1" FLOW SENSOR			
C	WTPRO3-C-18-SWM	WeatherTRAK ET PRO3 18 STATION CONTROLLER IN A STAINLESS STEEL WALL MOUNTED ENCLOSURE.			
—	CIM-5YA	5 YEAR EXTENSION OF WeatherTRAK Central.			
R	WT-WRS	WIRELESS RAIN SENSOR SYSTEM. AUTOMATICALLY SHUTS THE SYSTEM OFF AS SOON AS IT STARTS RAINING.			
SM	WM-100-1.0-RS-P	NETAFIM SUB WATER METER			



CONTROLLER AND STATION NUMBER

REMOTE CONTROL VALVE SIZE (IN INCHES)

FLOW (GPM)

WATER USE CLASSIFICATION OF ZONE

APPLICATION RATE (IN/HR) or DRIPLINE SPACING

AREA (SQ. FT.)

ASSOCIATED REMOTE CONTROL VALVE

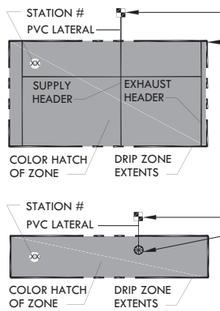
RECYCLED PURPLE MAIN LINE: 1.5" THROUGHOUT: 1120-SCHEDULE 40 PVC PLASTIC PIPE WITH SCHEDULE 40 PVC SOLVENT WELD FITTINGS. 18" COVER.

FLOW SENSOR/ MASTER CABLE: APPROXIMATE ROUTING OF FLOW SENSOR AND MASTER VALVE WIRES IN SEPARATE 1" CONDUITS. REFER TO DETAILS FOR MORE INFORMATION.

RECYCLED PURPLE LATERAL LINE: 3/4" AND LARGER: 1120-SCHEDULE 40 PVC PLASTIC PIPE WITH SCHEDULE 40 PVC SOLVENT WELD FITTINGS. 12" COVER.

PURPLE DRIPLINE LATERAL LINE: 3/4" AND LARGER: 1120-SCHEDULE 40 PVC PLASTIC PIPE WITH SCHEDULE 40 PVC SOLVENT WELD FITTINGS. 12" COVER.

PURPLE SLEEVING: SCHEDULE 40 PVC PLASTIC PIPE. COVER TO BE AS INDICATED IN SPECIFICATIONS OR AS INDICATED ABOVE FOR PIPE DEPTH OF COVER.



DRIPLINE REMOTE CONTROL VALVE

DRIP ZONE:

TORO DL2000 SERIES DRIPLINE WITH DL2000 INSERT FITTINGS, PART #RGP-212-E. TUBING TO BE INSTALLED 4" BELOW GRADE IN A 12" O.C. GRID ACCORDING TO DETAILS. SIZE EXHAUST HEADERS AS FOLLOWS: 1": 0-10 GPM, 1.25": 11-20 GPM. ALL EXHAUST HEADERS SHALL BE 1" SCH 40 PVC OR 1" SCH 40 FLEXIBLE PVC. USE SCH. 40 PVC SOLVENT WELD FITTINGS. EXTEND PVC HEADERS TO THE ENDS OF ALL DRIP ZONES TO BALANCE FLOW IF REQUIRED. SEE DETAILS FOR FURTHER INFORMATION.

DRIPLINE REMOTE CONTROL VALVE

APPROXIMATE CONNECTION POINT BETWEEN DRIPLINE TUBING AND PVC SUPPLY WHEN DRIP ZONE IS LESS THAN 3 GPM AND NO PVC SUPPLY/EXHUST HEADERS ARE NEEDED. REFER TO DRIPLINE TUBING CONNECTION DETAIL FOR MORE INFORMATION.

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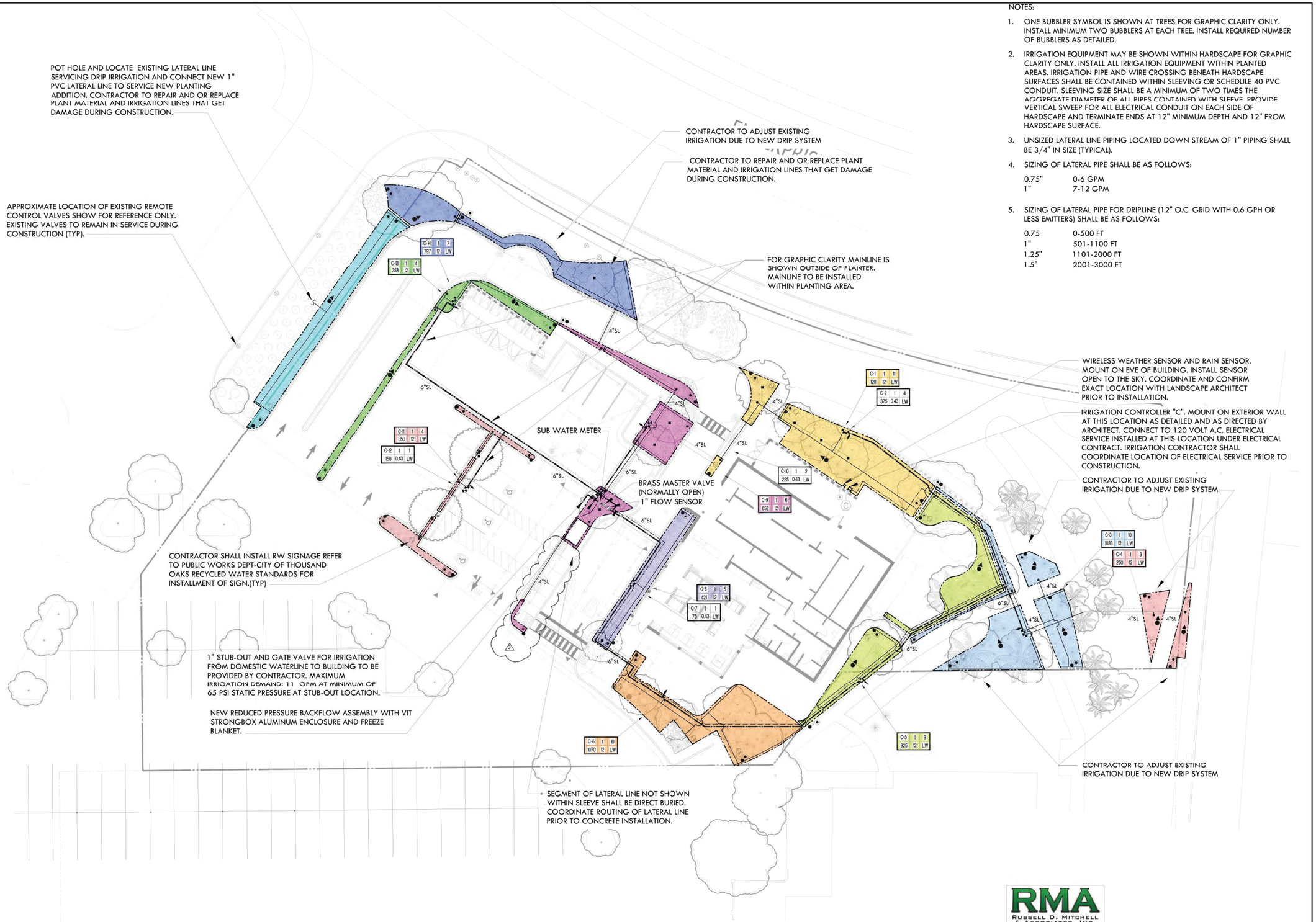
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3	12/10/21	PLANNING COMMENTS
2	11/04/21	PLANNING COMMENTS
1	09/24/21	PLANNING COMMENTS
	06/16/21	PLANNING SUBMITTAL

REVISIONS

Drawing Title
IRRIGATION NOTES & LEGEND

Job No. 21-026
Drawn IS
Scale NTS
Date 11/04/21

Sheet No.
L-4.0



NOTES:

1. ONE BUBBLER SYMBOL IS SHOWN AT TREES FOR GRAPHIC CLARITY ONLY. INSTALL MINIMUM TWO BUBBLERS AT EACH TREE. INSTALL REQUIRED NUMBER OF BUBBLERS AS DETAILED.
2. IRRIGATION EQUIPMENT MAY BE SHOWN WITHIN HARDSCAPE FOR GRAPHIC CLARITY ONLY. INSTALL ALL IRRIGATION EQUIPMENT WITHIN PLANTED AREAS. IRRIGATION PIPE AND WIRE CROSSING BENEATH HARDSCAPE SURFACES SHALL BE CONTAINED WITHIN SLEEVING OR SCHEDULE 40 PVC CONDUIT. SLEEVING SIZE SHALL BE A MINIMUM OF TWO TIMES THE AGGREGATE DIAMETER OF ALL PIPES CONTAINED WITH SLEEVE. PROVIDE VERTICAL SWEEP FOR ALL ELECTRICAL CONDUIT ON EACH SIDE OF HARDSCAPE AND TERMINATE ENDS AT 12" MINIMUM DEPTH AND 12" FROM HARDSCAPE SURFACE.
3. UNSIZED LATERAL LINE PIPING LOCATED DOWN STREAM OF 1" PIPING SHALL BE 3/4" IN SIZE (TYPICAL).
4. SIZING OF LATERAL PIPE SHALL BE AS FOLLOWS:

0.75"	0-6 GPM
1"	7-12 GPM

5. SIZING OF LATERAL PIPE FOR DRIPLINE (12" O.C. GRID WITH 0.6 GPH OR LESS EMITTERS) SHALL BE AS FOLLOWS:

0.75	0-500 FT
1"	501-1100 FT
1.25"	1101-2000 FT
1.5"	2001-3000 FT

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0 8' 16' 32' 48'

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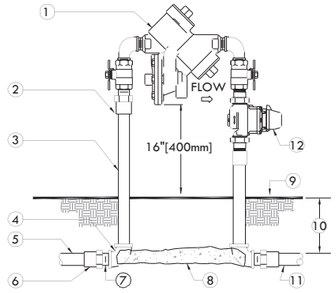
NO.	DATE	REMARKS
3	12/10/21	PLANNING COMMENTS
2	11/04/21	PLANNING COMMENTS
1	09/24/21	PLANNING COMMENTS
	06/16/21	PLANNING SUBMITTAL

REVISIONS

Drawing Title
IRRIGATION PLAN

Job No. 21-026
Drawn IS
Scale 1/16" = 1'-0"
Date 11/04/21

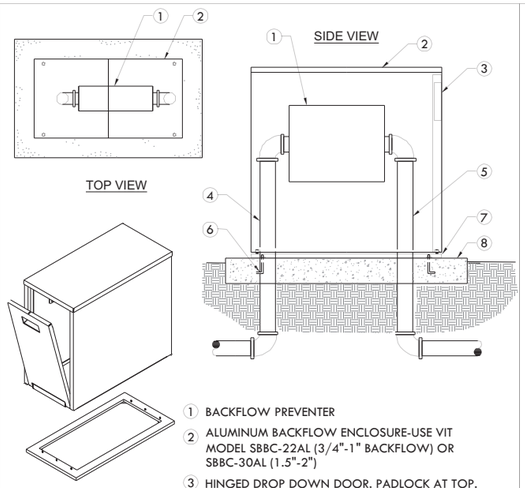
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1. REDUCED PRESSURE BACKFLOW ASSEMBLY.
2. WROUGHT COPPER MALE ADAPTER-2 TOTAL (SOLDER x THREAD CONNECTION).
3. COPPER TYPE "K" PIPE (LENGTH AS REQUIRED).
4. WROUGHT COPPER 90° ELBOW-2 TOTAL (SOLDER x THREAD CONNECTION).
5. PVC MAIN LINE TO POINT OF CONNECTION.
6. BUSH AS NECESSARY FOR SIZE TRANSITION.
7. SCHEDULE 40 PVC MALE ADAPTER-2 TOTAL.
8. CONCRETE SUPPORT BLOCK.
9. FINISH GRADE.
10. REFER TO IRRIGATION LEGEND.
11. PVC MAIN LINE TO IRRIGATION SYSTEM.
12. SUB-METER.

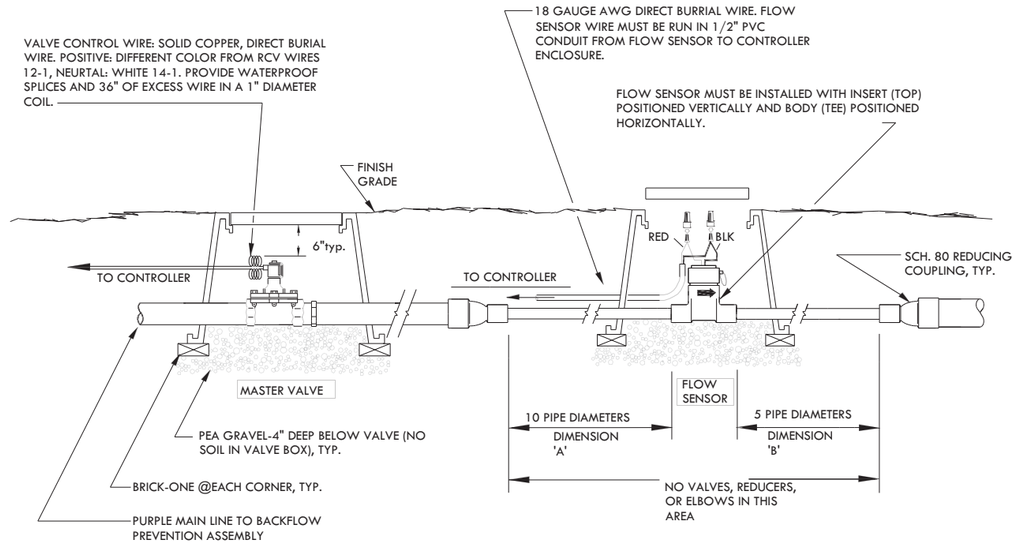
NOTES:
1. INSTALL A FREEZE PREVENTATIVE BLANKET AROUND BACKFLOW ASSEMBLY. BLANKET SHALL BE GREEN.
2. DO NOT SOLDER CONNECT FITTINGS WHILE THREADED INTO BACKFLOW ASSEMBLY. THIS MAY CAUSE DAMAGE TO DEVICE.
3. NIPPLES AND FITTINGS TO BE SAME IPT SIZE AS BACKFLOW ASSEMBLY.

1 REDUCED PRESSURE BACKFLOW ASSEMBLY
SCALE: NONE

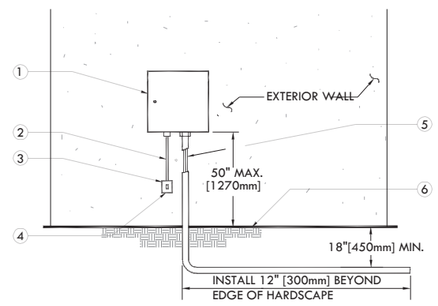


1. BACKFLOW PREVENTER
2. ALUMINUM BACKFLOW ENCLOSURE-USE VIT MODEL SBBC-22AL (3/4"-1" BACKFLOW) OR SBBC-30AL (1.5"-2")
3. HINGED DROP DOWN DOOR. PADLOCK AT TOP.
4. WATER SERVICE INLET PIPING
5. WATER SERVICE OUTLET PIPING
6. 3/8" "L" STYLE ANCHOR BOLTS SET IN CONCRETE BASE
7. SECURED ANCHOR PLATE MOUNTING BASE IN CONCRETE WITH 3#8" J BOLTS (4 PLACES).
8. POURED CONCRETE BASE - 6" MIN. THICKNESS - EXTEND 4" BEYOND OUTSIDE DIMENSIONS OF ENCLOSURE

2 ALUMINUM BACKFLOW ENCLOSURE-LOW PROFILE
SCALE: NONE

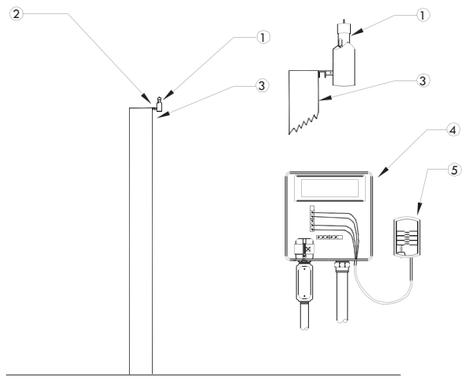


3 INSTALLATION DETAIL - MASTER VALVE/FLOW SENSOR
SCALE: NONE



1. IRRIGATION CONTROLLER.
2. 120 VOLT SERVICE IN RIGID STEEL CONDUIT.
3. 120 VOLT LOCKABLE WEATHERPROOF ON/OFF SWITCH PROVIDED UNDER IRRIGATION CONTRACT.
4. 120 VOLT SERVICE TO CONTROLLER LOCATION PROVIDED BY CONTRACTOR.
5. LOW VOLTAGE WIRE IN SCHEDULE 40 PVC CONDUIT. PAINT CONDUIT ABOVE GRADE TO MATCH BUILDING SURFACE COLOR.
6. FINISH GRADE OR HARDSCAPE.

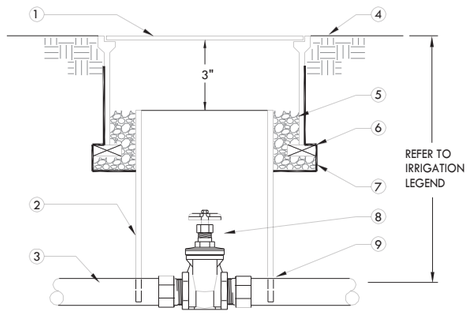
4 CONTROLLER - EXTERIOR WALL MOUNTED
SCALE: NONE



NOTE: MAXIMUM LINE OF SIGHT FROM RAIN SENSOR TO RECEIVER IS 300 FT. DISTANCE IS LESS IF OBSTRUCTIONS EXIST. SENSOR MUST BE INSTALLED IN "CLEAR SPACE" WHERE IT IS EXPOSED TO UNOBSTRUCTED RAINFALL AND IS CLEAR OF IRRIGATION SPRAY.

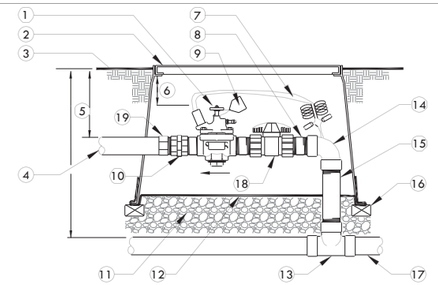
1. WIRELESS RAIN SENSOR TRANSMITTER (WALL MOUNTED)
2. MOUNT RAIN SENSOR ON WALL
3. WALL
4. CONTROLLER
5. RAIN SENSOR RECEIVER

5 WIRELESS RAIN SENSOR-WALL MOUNT
SCALE: NONE



1. 10" PURPLE ROUND PLASTIC VALVE BOX WITH BOLT DOWN LID.
2. 8" CLASS 160 OR SCHEDULE 40 PVC PIPE (NOTCH TO FIT OVER MAIN LINE PIPE).
3. PURPLE PVC MAIN LINE.
4. FINISH GRADE.
5. PEA GRAVEL OR 3/4" DRAIN ROCK - 4" DEEP (NO SOIL IN VALVE BOX).
6. BRICK-2 TOTAL.
7. 19 GAUGE 1/2" SQUARE WIRE MESH. WRAP UP SIDES OF BOX.
8. GATE VALVE WITH X-TOP HANDLE.
9. MALE ADAPTER. REFER TO LEGEND FOR FITTING TYPE.

6 GATE VALVE - 3" [75mm] AND SMALLER
SCALE: NONE



1. REMOTE CONTROL VALVE WITH FLOW CONTROL AND MANUAL BLEED (PRESSURE REGULATOR WHERE SHOWN ON PLANS).
2. USE A NDS PRO SERIES 14" X 19" RECTANGULAR PURPLE PLASTIC VALVE BOX WITH BOLT DOWN LID FOR 1" VALVES. FOR 1.5" AND LARGER VALVES INSTALL BALL VALVE WITHIN A SEPARATE 10" ROUND BOX OR ONE BALL VALVE PER MANIFOLD OF VALVES. GATE VALVE SIZE SHALL BE SAME AS LARGEST VALVE WITHIN MANIFOLD. ONE VALVE PER BOX-NO EXCEPTIONS. INSTALL BOX AS SHOWN IN BOX INSTALLATION DETAIL.
3. FINISH GRADE.
4. PURPLE PVC LATERAL LINE.
5. REFER TO IRRIGATION SPECS.
6. 3" [75mm] MIN, 6" [150mm] MAX.
7. VALVE CONTROL WIRE- PROVIDE SEAL PACKS AT ALL SPLICES AND 3' [1m] OF EXCESS UF WIRE IN A 1" [25mm] DIAMETER COIL.
8. SCHEDULE 80 PVC NIPPLE (3 TOTAL).
9. VALVE I.D. TAG (CONTROLLER AND STATION NUMBER) AND PURPLE RECYCLED WATER WARNING TAG (2 TAGS TOTAL)
10. SCHEDULE 80 PVC THREADED UNION.
11. PEA GRAVEL OR 3/4" DRAIN ROCK- 4" [100mm] DEEP BELOW VALVE (NO SOIL IN VALVE BOX).
12. 19 GAUGE 1/2" [12mm] SQUARE WIRE MESH.
13. SCHEDULE 40 OR 80 PVC TEE. REFER TO LEGEND FOR TYPE.
14. SCHEDULE 80 PVC 90° ELBOW (TxT).
15. SCHEDULE 80 PVC NIPPLE- LENGTH AS REQUIRED.
16. BRICK-1 EACH CORNER.
17. PURPLE PVC MAIN LINE.
18. SCHEDULE 80 PVC UNION BALL VALVE (ONE PER VALVE).
19. SCHEDULE 40 MALE ADAPTER

7 REMOTE CONTROL VALVE
SCALE: NONE

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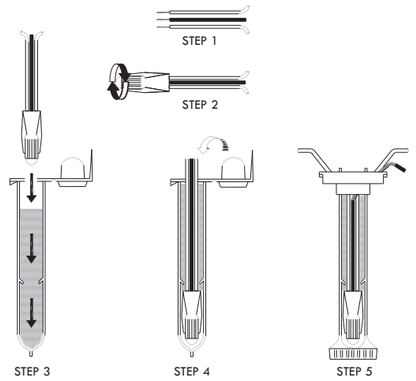
NO.	DATE	REMARKS
3	12/10/21	PLANNING COMMENTS
2	11/04/21	PLANNING COMMENTS
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REVISIONS

Drawing Title
IRRIGATION DETAILS

Job No. 21-026
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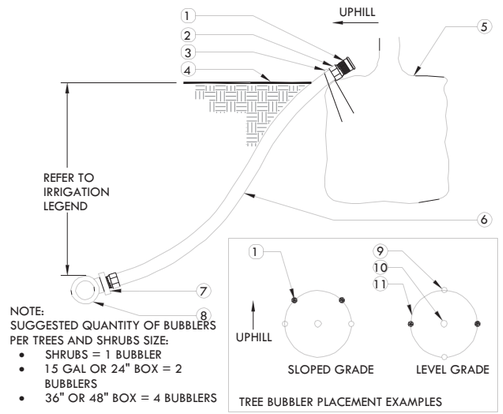
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NOTE:
MAXIMUM # OF WIRES PER CONNECTOR:
- 3-#14 GAUGE
- 2-#12 GAUGE

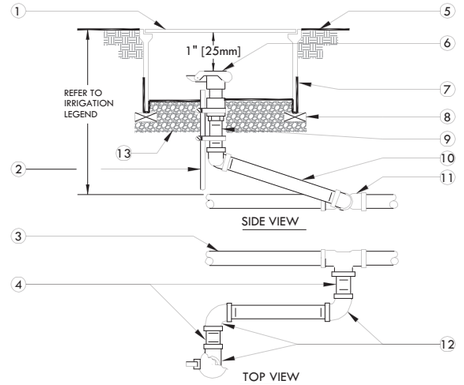
INSTRUCTIONS:
1. STRIP WIRES APPROXIMATELY 1/2" FROM ENDS TO EXPOSE WIRE.
2. TWIST CONNECTOR AROUND WIRES CLOCKWISE UNTIL HAND TIGHT, DO NOT OVERTIGHTEN.
3. INSERT WIRE ASSEMBLY TO BOTTOM OF GEL-FILLED TUBE. CHECK TO MAKE SURE CONNECTOR HAS BEEN PUSHED PAST LOCKING FINGERS AND IS SEATED AT THE BOTTOM OF THE TUBE.
4. PLACE WIRES WHICH EXIT TUBE IN WIRE EXIT HOLES AND CLOSE CAP UNTIL IT SNAPS.
5. INSPECT FINAL SPLICE ASSEMBLY THAT IT IS SECURED.

1 WEATHERPROOF WIRE SPLICE ASSEMBLY
SCALE: NONE



1. BUBBLER (TO BE INSTALLED ON TOP OF ROOTBALL).
2. 1/2" SCH. 40 MALE ADAPTER (2 TOTAL).
3. 6" STAPLE.
4. FINISH GRADE.
5. TREE OR SHRUB ROOTBALL.
6. 1/2" IPS FLEXIBLE PVC. USE WELD-ON 795 SOLVENT CEMENT OR EQUAL WHEN BONDING PVC HOSE TO FITTINGS.
7. PVC TEE (SST), ELBOW (ST) OR FEMALE ADAPTER.
8. PURPLE PVC LATERAL LINE.
9. TREE STAKES.
10. TREE OR SHRUB.
11. EDGE OF ROOTBALL (TYPICAL).

2 TREE AND SHRUB BUBBLER
SCALE: NONE

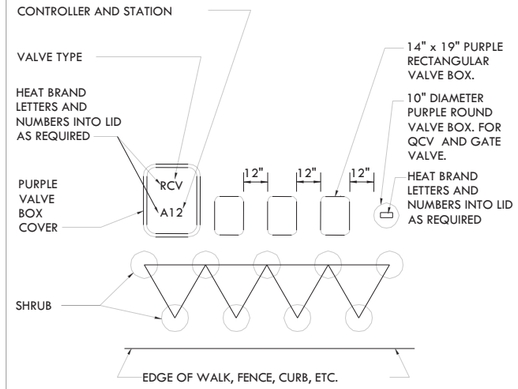


1. 10" PURPLE ROUND PLASTIC VALVE BOX WITH BOLT DOWN LID.
2. 1 1/4" x 1 1/4" x 3/16" [30mm x 30mm x 5mm] ANGLE IRON 30" [760mm] LONG W/2 STAINLESS STEEL STRAPS (ONE AROUND QCV).
3. PURPLE PVC MAIN LINE.
4. 3" [75mm] LONG SCHEDULE 80 PVC THREADED NIPPLE.
5. FINISH GRADE.
6. QUICK COUPLING VALVE WITH PURPLE CAP.
7. 19 GAUGE 1/2" [13mm] SQUARE WIRE MESH.
8. BRICK - 2 TOTAL.
9. SCHEDULE 80 PVC THREADED NIPPLE.
10. 10" [250mm] LONG SCHEDULE 80 PVC THREADED NIPPLE.
11. UPC APPROVED SCHEDULE 40 PVC TEE OR ELBOW.
12. SCHEDULE 80 PVC THREADED 90° ELL.
13. PEA GRAVEL OR 3/4" DRAIN ROCK- 4" [100mm] DEEP BELOW VALVE (NO SOIL IN VALVE BOX).

NOTE:
NIPPLES AND FITTINGS TO BE SAME SIZE AS VALVE IPT INLET THREAD SIZE.

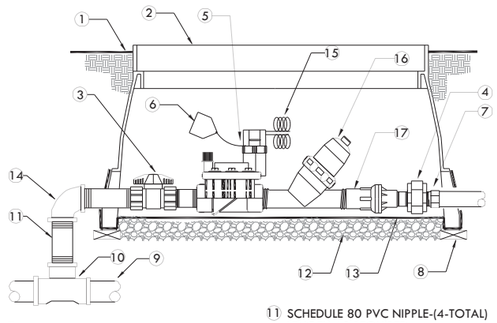
3 QUICK COUPLING VALVE
SCALE: NONE

ALL VALVE BOXES TO BE PURPLE IN COLOR AND LABELED "RECYCLED WATER FOR IRRIGATION".



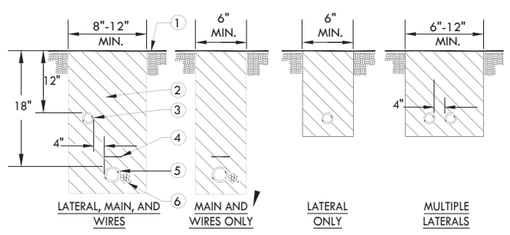
INSTRUCTIONS:
1. CENTER VALVE BOX OVER REMOTE CONTROL VALVE TO FACILITATE SERVICING VALVE.
2. SET BOXES 1" ABOVE FINISH GRADE OR MULCH COVER IN GROUND COVER/SHRUB AREA AND FLUSH WITH FINISH GRADE IN TURF AREA.
3. SET RCV AND VALVE BOX ASSEMBLY IN GROUND COVER/SHRUB AREA. PLACE BEHIND SECOND ROW OF SHRUBS (TYPICAL).
4. SET BOXES PARALLEL TO EACH OTHER AND PERPENDICULAR TO EDGE OF LAWN, WALK, FENCE, CURB, ETC.
5. AVOID HEAVILY COMPACTING SOIL AROUND VALVE BOXES TO PREVENT COLLAPSE AND DEFORMATION OF VALVE BOX SIDES.
6. INSTALL EXTENSION BY VALVE BOX MANUFACTURER AS REQUIRED TO COMPLETELY ENCLOSE ASSEMBLY FOR EASY ACCESS.

4 VALVE BOX INSTALLATION (PURPLE)
SCALE: NONE



1. FINISH GRADE
2. PURPLE RECTANGULAR JUMBO PLASTIC VALVE BOX WITH BOLT DOWN LID. ONE VALVE PER BOX- NO EXCEPTIONS. INSTALL BOX AS SHOWN IN BOX INSTALLATION DETAIL.
3. SCHEDULE 80 PVC UNION BALL VALVE (ONE PER VALVE)
4. SCHEDULE 80 PVC THREADED UNION
5. REMOTE CONTROL VALVE
6. VALVE I.D. TAG (CONTROLLER AND STATION NUMBER) AND PURPLE RECYCLED WATER WARNING TAG (2 TAGS TOTAL)
7. SCHEDULE 40 MALE ADAPTER
8. BRICK-1 EACH CORNER.
9. PURPLE PVC MAIN LINE.
10. SCHEDULE 40 OR 80 PVC TEE. REFER TO LEGEND FOR TYPE.
11. SCHEDULE 80 PVC NIPPLE-(4-TOTAL) LENGTH AS REQUIRED.
12. PEA GRAVEL OR 3/4" [20mm] DRAIN ROCK - 4" [102mm] DEEP BELOW VALVE (NO SOIL IN VALVE BOX).
13. 19 GAUGE 1/2" [13mm] SQUARE WIRE MESH.
14. SCHEDULE 80 PVC 90° ELBOW (TxT).
15. VALVE CONTROL WIRE- PROVIDE 3M-DBY SEAL PACKS AT ALL SPLICES AND 3' [1m] OF EXCESS UF WIRE IN A 1" [25mm] DIAMETER COIL.
16. DISC FILTER
17. PRESSURE REGULATOR (40 PSI)

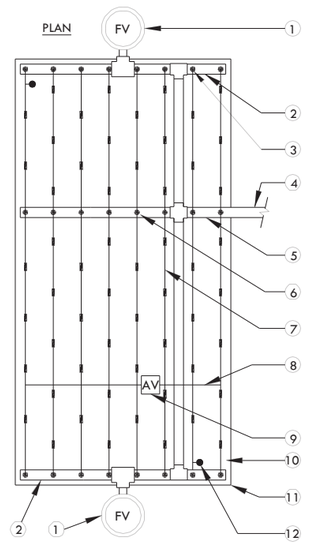
5 REMOTE CONTROL VALVE (DRIPZONE)
SCALE: NONE



NOTES:
1. ALL MAIN SUPPLY LINES AND LATERAL LINES SHALL BE PLACED IN SLEEVES UNDER PAVED SURFACES. INSTALL LOW VOLTAGE WIRES WITHIN A SEPARATE CONDUIT UNDER PAVED SURFACES. DO NOT TAPE WIRES WITHIN CONDUIT.
2. REUSE SALVAGED EXCAVATED FILL AND COMPACT TO ORIGINAL DENSITY IN LANDSCAPE AREAS. ALL OTHER AREAS SHALL BE AT 95% COMPACTION. BACKFILL MATERIAL SHALL BE THE EARTH EXCAVATED FROM THE TRENCHES, FREE FROM ROCKS (ANYTHING LARGER THAN 2"), CONCRETE CHUNKS, AND OTHER FOREIGN OR COARSE MATERIALS.
3. WHEN 12" POP-UP SPRINKLER HEADS ARE USED, INCREASE THE DEPTH OF LATERAL TO 18" AT THE SPRINKLER LOCATION ONLY.

1. FINISH GRADE.
2. CLEAN BACKFILL MATERIAL.
3. PURPLE LATERAL LINE.
4. 3" DETECTABLE WARNING TAPE OVER MAIN LINE. INSTALL 3" ABOVE MAIN LINE. USE CHRISTY MODEL #TA-DT-3-BIRR FOR POTABLE IRRIGATION SYSTEMS OR #TA-DT-3-PRW FOR RECYCLED IRRIGATION WATER SYSTEMS
5. PURPLE MAIN LINE.
6. LOW VOLTAGE CONTROL WIRES, TWO-WIRE CABLE, OR CONDUIT WITH WIRES. FOR MULTIPLE WIRES, TAPE AND BUNDLE WIRES AT 10 FT. INTERVALS. WIRING SHALL BE LAID OUT LOOSELY IN THE TRENCH.

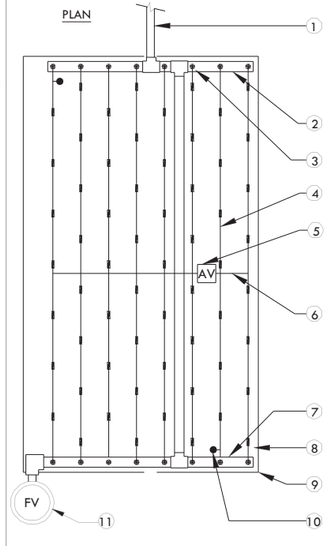
6 TRENCHING
SCALE: NONE



1. FLUSH VALVE PLUMBED TO FLUSH MANIFOLD AT LOW POINT
2. PVC FLUSH MANIFOLD. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
3. MANIFOLD-TO-ELBOW CONNECTION (TYP).
4. PURPLE PVC LATERAL LINE FROM VALVE. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
5. PVC SUPPLY MANIFOLD. EXTEND TO END OF ZONE/EXHAUST HEADER.
6. MANIFOLD-TO-TEE CONNECTION.
7. DRIPLINE LATERAL.
8. AIR/VACUUM RELIEF LATERAL, BLANK POLY TUBING CENTERED ON MOUND OR BERM.
9. AIR/VACUUM RELIEF PLUMBED TO BLANK 5/8" POLY TUBING AT EACH HIGH POINT.
10. PERIMETER LATERALS 2" [50mm] TO 4" [100mm] FROM EDGE.
11. AREA PERIMETER.
12. DRIPLINE OPERATION INDICATOR LOCATED AT THE ENDS OF EACH DRIPLINE ZONE.

NOTE:
1. THE TOTAL LENGTH OF ALL INTERCONNECTED DRIP LINE OFF A SINGLE PVC SUPPLY LINE CONNECTION OR A SINGLE RUN OF DRIPLINE SHALL NOT EXCEED 300 FT.
2. INSTALL DRIPLINE 2-4" BELOW GRADE AND STAKE DOWN EVERY 4' OR AS REQUIRED.

7 TORO DL 2000 CENTER FEED LAYOUT
SCALE: NONE



1. PURPLE PVC LATERAL LINE FROM VALVE. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
2. PVC FLUSH MANIFOLD. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
3. MANIFOLD-TO-ELBOW CONNECTION (TYP).
4. DRIPLINE LATERAL.
5. AIR/VACUUM RELIEF VALVE PLUMBED TO BLANK 5/8" TUBING AT EACH HIGH POINT.
6. AIR/VACUUM RELIEF LATERAL, BLANK 5/8" POLY TUBING CENTERED ON MOUND OR BERM.
7. PVC FLUSH MANIFOLD. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
8. PERIMETER LATERALS 2" [50mm] TO 4" [100mm] FROM EDGE.
9. AREA PERIMETER.
10. DRIP OPERATION INDICATOR LOCATED AT THE ENDS OF EACH DRIPLINE ZONES.
11. AUTOMATIC FLUSH VALVE PLUMBED TO FLUSH MANIFOLD AT LOW POINT.

NOTE:
1. THE TOTAL LENGTH OF ALL INTERCONNECTED DRIP LINE OFF A SINGLE PVC SUPPLY LINE CONNECTION OR A SINGLE RUN OF DRIPLINE SHALL NOT EXCEED 300 FT.
2. INSTALL DRIPLINE 2-4" BELOW GRADE AND STAKE DOWN EVERY 4' OR AS REQUIRED.

8 TORO DL 2000 END FEED LAYOUT
SCALE: NONE

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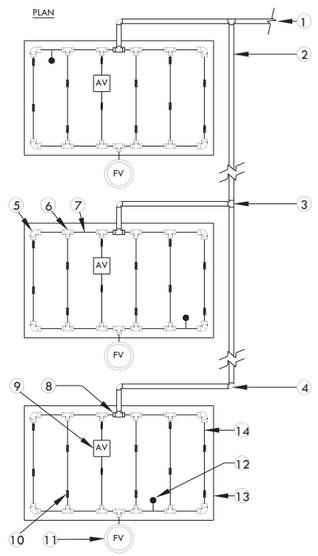
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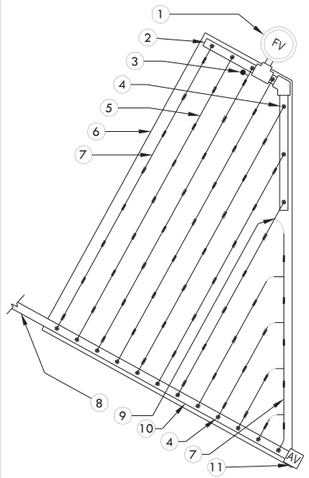
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1. PURPLE PVC LATERAL LINE FROM VALVE. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
2. PVC FLUSH MANIFOLD. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
3. PVC TEE (SxSxS).
4. PVC ELL (SxS).
5. TORO TRI-LOC ELL (TL-E).
6. TORO TRI-LOC TEE (TL-T).
7. BLANK 5/8" [16mm] POLY TUBING AT SUPPLY AND FLUSH END OF EACH ISLAND.
8. REFER TO DRIPLINE TO PVC CONNECTION DETAIL.
9. AIR/VACUUM RELIEF VALVE PLUMBED TO TUBING AT HIGH POINT.
10. DRIPLINE LATERAL.
11. MANUAL FLUSH VALVE PLUMBED TO TUBING AT LOW POINT.
12. DRIPLINE OPERATION INDICATOR LOCATED AT THE ENDS OF EACH DRIPLINE ZONE.
13. ISLAND PERIMETER.
14. PERIMETER LATERALS 2" [50mm] TO 4" [100mm] FROM EDGE.

NOTE:
1. THE TOTAL LENGTH OF A SINGLE DRIP LINE RUN SHALL NOT EXCEED 300 FT.
2. INSTALL DRIPLINE 2-4" BELOW GRADE AND STAKE DOWN EVERY 4' OR AS REQUIRED.

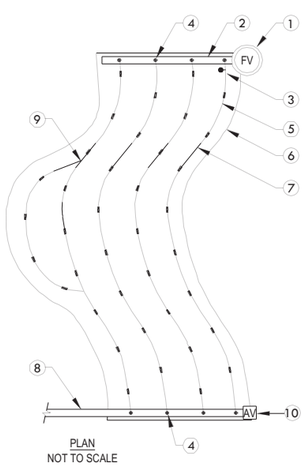
1 TORO DL 2000 ISLAND LAYOUT
SCALE: NONE



1. FLUSH VALVE PLUMBED TO FLUSH MANIFOLD AT LOW POINT
2. PVC FLUSH MANIFOLD. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
3. DRIPLINE OPERATION INDICATOR LOCATED AT THE ENDS OF EACH DRIPLINE ZONE.
4. MANIFOLD-TO-ELBOW CONNECTION.
5. DRIPLINE LATERAL.
6. AREA PERIMETER.
7. PERIMETER LATERALS 2" [50mm] TO 4" [100mm] FROM EDGE.
8. PURPLE PVC LATERAL LINE FROM VALVE. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
9. TORO TRI-LOC TEE (TL-T)
10. PVC SUPPLY MANIFOLD.
11. TORO DL2000 AIR/VACUUM RELIEF VALVE (YD-500-34) PLUMBED TO SUPPLY MANIFOLD AT HIGH POINT.

NOTE:
1. THE TOTAL LENGTH OF ALL INTERCONNECTED DRIP LINE OFF A SINGLE PVC SUPPLY LINE CONNECTION OR A SINGLE RUN OF DRIPLINE SHALL NOT EXCEED 300 FT.
2. INSTALL DRIPLINE 2-4" BELOW GRADE AND STAKE DOWN EVERY 4' OR AS REQUIRED.

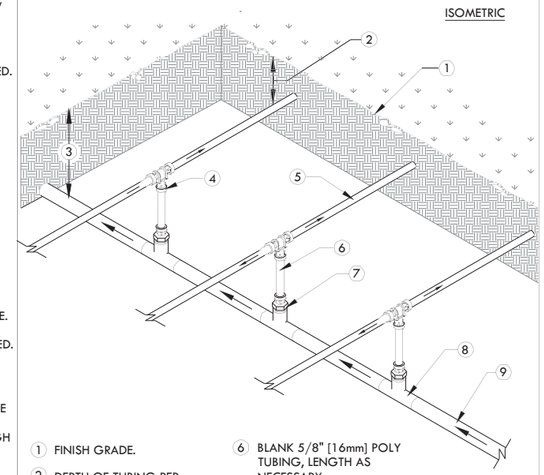
2 TORO DL2000 TRIANGULAR LAYOUT
SCALE: NONE



1. FLUSH VALVE PLUMBED TO FLUSH MANIFOLD AT LOW POINT
2. PVC FLUSH MANIFOLD. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
3. DRIPLINE OPERATION INDICATOR LOCATED AT THE ENDS OF EACH DRIPLINE ZONE.
4. MANIFOLD-TO-ELBOW CONNECTION.
5. DRIPLINE LATERAL.
6. AREA PERIMETER.
7. PERIMETER LATERALS 2" [50mm] TO 4" [100mm] FROM EDGE.
8. PURPLE PVC SUPPLY LINE/HEADER FROM VALVE. MINIMUM SIZE TO BE 1" UNLESS OTHERWISE NOTED.
9. TORO TRI-LOC TEE (TL-T)
10. TORO DL2000 AIR/VACUUM RELIEF VALVE (YD-500-34) PLUMBED TO SUPPLY MANIFOLD AT HIGH POINT.

NOTE:
1. THE TOTAL LENGTH OF ALL INTERCONNECTED DRIP LINE OFF A SINGLE PVC SUPPLY LINE CONNECTION OR A SINGLE RUN OF DRIPLINE SHALL NOT EXCEED 300 FT.
2. INSTALL DRIPLINE 2-4" BELOW GRADE AND STAKE DOWN EVERY 4' OR AS REQUIRED.

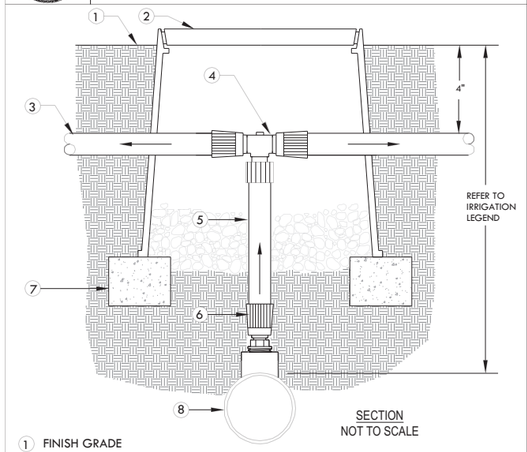
3 TORO DL2000 ODD CURVE LAYOUT
SCALE: NONE



1. FINISH GRADE.
2. DEPTH OF TUBING PER IRRIGATION LEGEND.
3. DEPTH OF PVC LATERAL LINE PER IRRIGATION LEGEND
4. TORO TRI-LOC TEE (TL-T)
5. DRIPLINE TUBING.
6. BLANK 5/8" [16mm] POLY TUBING, LENGTH AS NECESSARY.
7. TORO TRI-LOC MPT ADAPTER (TL-M50)
8. PVC TEE (SxSxT) WITH 1/2" FPT OUTLET.
9. PURPLE PVC LATERAL LINE FROM REMOTE CONTROL VALVE.

NOTE:
THE TOTAL LENGTH OF A SINGLE DRIP LINE RUN SHALL NOT EXCEED 300 FT.

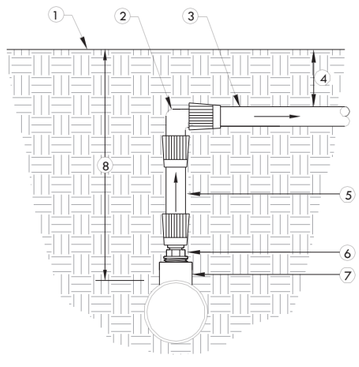
4 TORO DL 2000 CENTER FEED MANIFOLD
SCALE: NONE



1. FINISH GRADE
2. CARSON 708 OR EQUAL. COLOR: PURPLE FOR RECYCLED WATER SYSTEMS.
3. DRIPLINE TUBING
4. TORO TRI-LOC TEE
5. BLANK 5/8" [16mm] POLY TUBING, LENGTH AS NECESSARY.
6. TORO TRI-LOC MPT ADAPTER (TL-M50)
7. BRICK (1 OF 2)
8. SCH 40 PVC TEE (SxSxT) WITH 1/2" FPT OUTLET.
8. PURPLE PVC LATERAL LINE SUPPLY. MINIMUM SIZE TO BE 1" UNLESS SIZED DIFFERENTLY ON DRAWINGS. USE SCH 40 PVC 1"x1"x1/2" TEE OR 90° ELBOW.

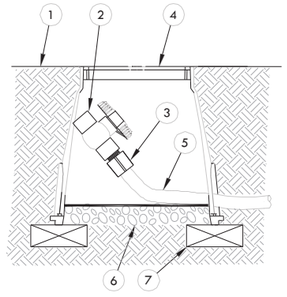
NOTE:
USE ONLY WHEN THE TOTAL LENGTH OF DRIP LINE SERVICED FROM THIS PVC CONNECTION IS LESS THAN 300 FT.

5 DRIPLINE TO PVC CONNECTION-SINGLE SOURCE DRIP AREAS ONLY
SCALE: NONE



1. FINISH GRADE
2. TORO TRI-LOC ELBOW (TL-E)
3. DRIPLINE TUBING
4. DEPTH OF TUBING PER IRRIGATION LEGEND.
5. BLANK 5/8" [16mm] POLY TUBING, LENGTH AS NECESSARY.
6. TORO TRI-LOC MPT ADAPTER (TL-M50)
7. SCH 40 PVC TEE (SxSxT) WITH 1/2" FPT OUTLET.
8. DEPTH OF PVC LATERAL LINE PER IRRIGATION LEGEND

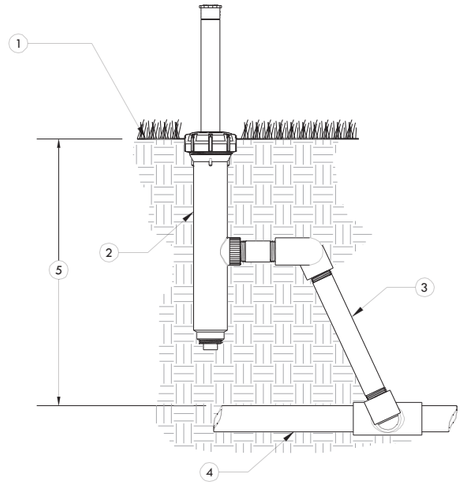
6 DRIPLINE MANIFOLD TO ELBOW CONNECTION
SCALE: NONE



NOTE:
ALLOW A 12" MINIMUM OF PVC HOSE IN VALVE BOX IN ORDER TO DIRECT FLUSHED WATER OUTSIDE VALVE BOX.

1. FINISH GRADE
2. 1/2" SCH 40 THREADED BALL VALVE.
3. 1/2" SCH 40 MALE ADAPTER.
4. 6" PURPLE ROUND PLASTIC VALVE BOX.
5. 1" IPS PVC HOSE FROM EXHAUST HEADER OR BLANK DRIP TUBING.
6. PEA GRAVEL SUMP (6" DEEP).
7. BRICK (1 OF 2)

7 DRIPLINE-FLUSH POINT
SCALE: NONE



1. FINISH GRADE.
2. 570 POP-UP DRIP OPERATION INDICATOR ASSEMBLY (TORO MODEL 570-DRIP-IND) INSTALLED AT FURTHEST POINT DOWNSTREAM OF ZONE VALVE.
3. PVC OR SWING PIPE SWING JOINT ASSEMBLY.
4. PVC DRIP ZONE FOOTER.
5. DEPTH OF PVC LINE PER SPECIFICATIONS.

NOTE: TEFLON TAPE ALL THREADED JOINTS

8 570 POP-UP DRIP OPERATION INDICATOR
SCALE: NONE

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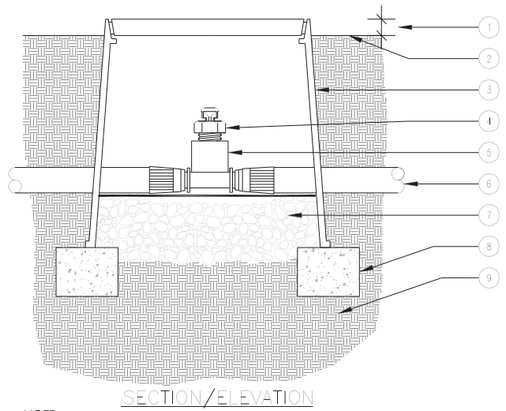
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Sheet No.
L-4.4

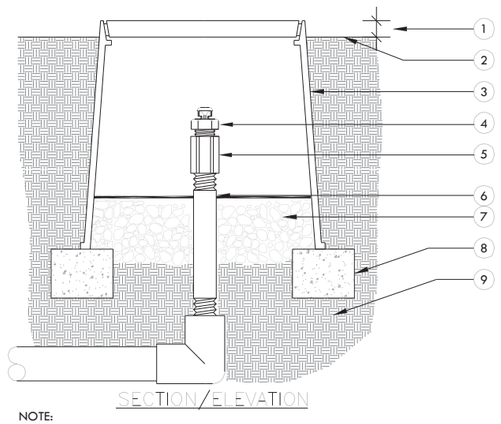


SECTION/ELEVATION

NOTE:
USE ONE AIR/RELIEF VALVE FOR EVERY 7 GPM PER ZONE. LOCATE AT HIGH POINTS.

1. 1" ABOVE FINISH GRADE.
2. FINISH GRADE.
3. 6" PURPLE ROUND PLASTIC VALVE BOX. HEAT BRAND "AR" ON LID IN 1" HIGH CHARACTERS.
4. TORO DL2000 AIR/VACUUM RELIEF VALVE (YD-500-34).
5. TORO TRI-LOC TEE X 1/2" FPT ADAPTER (TL-T-F50)
6. TORO DL2000 TUBING/ AIR-RELIEF LATERAL.
7. PEA GRAVEL (4" DEEP).
8. BRICK SUPPORTS (2 COMMON BRICKS REQUIRED).
9. NATIVE SOIL PER SPECIFICATIONS.

1 AIR VACUUM RELIEF VALVE IN DRIPLINE
SCALE: NONE



SECTION/ELEVATION

NOTE:
USE ONE AIR/RELIEF VALVE FOR EVERY 7 GPM PER ZONE. LOCATE AT HIGH POINTS.

1. 1" ABOVE FINISH GRADE.
2. FINISH GRADE.
3. 6" PURPLE ROUND PLASTIC VALVE BOX. HEAT BRAND "AR" ON LID IN 1" HIGH CHARACTERS.
4. TORO DL2000 AIR/VACUUM RELIEF VALVE (YD-500-34).
5. 1/2" SCH 40 PVC COUPLING (TxT)
6. 1/2" SCH 80 PVC NIPPLE (LENGTH AS REQUIRED).
7. PEA GRAVEL (4" DEEP).
8. BRICK SUPPORTS (2 COMMON BRICKS REQUIRED).
9. NATIVE SOIL PER SPECIFICATIONS.

2 AIR VACUUM RELIEF VALVE ON PVC ELL
SCALE: NONE

WATER USAGE CALCULATIONS

WATER USE ESTIMATION & IRRIGATION SCHEDULE -Amy's Drive Thru-Aliso Viego

WATER TYPE	POTABLE
CITY	Laguna Beach
ETO	43.3
DATE	9/30/2021

Nearest City to project with published ET data

REGULAR LANDSCAPE AREAS

STATION /HYDROZONE	GPM	AREA (sq.ft) (HA)	WATER USE TYPE (LW=LOW, MW=MOD, HW=HIGH)	PLANT TYPE	IRRIGATION TYPE	PLANT FACTOR (PF)	IRRIGATION EFFICIENCY (IE)	PRECIP. RATE/ APPLICATION RATE (IN/HR)	ETAF (PF/IE)	CYCLES PER DAY	DAYS PER WEEK	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEP	OCT	NOV	DEC	ETWU (GALLONS PER YEAR)	PERCENTAGE OF LANDSCAPE
												MONTHLY ETO													
												2.2	2.7	3.4	3.8	4.6	4.6	4.9	4.9	4.4	3.4	2.4	2.0		
												TOTAL RUN TIME IN MINUTES PER DAY													
C-1	11	1211	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	12,041	15%
C-2	4	375	LW	TREE LW	BUBBLER (TREE) 0.25 GPM	0.3	0.81	0.43	0.4	2	2	0.0	0.0	20.0	23.0	27.0	27.0	29.0	29.0	26.0	20.0	15.0	0.0	3,729	5%
C-3	10	1033	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	10,271	13%
C-4	3	250	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	2,486	3%
C-5	9	925	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	9,197	12%
C-6	10	1070	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	10,639	14%
C-7	1	75	LW	TREE LW	BUBBLER (TREE) 0.25 GPM	0.3	0.81	0.43	0.4	2	2	0.0	0.0	20.0	23.0	27.0	27.0	29.0	29.0	26.0	20.0	15.0	0.0	746	1%
C-8	5	420	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	4,176	5%
C-9	6	652	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	6,483	8%
C-10	2	225	LW	TREE LW	BUBBLER (TREE) 0.25 GPM	0.3	0.81	0.43	0.4	2	2	0.0	0.0	20.0	23.0	27.0	27.0	29.0	29.0	26.0	20.0	15.0	0.0	2,237	3%
C-11	4	350	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	3,480	4%
C-12	1	150	LW	TREE LW	BUBBLER (TREE) 0.25 GPM	0.3	0.81	0.43	0.4	2	2	0.0	0.0	20.0	23.0	27.0	27.0	29.0	29.0	26.0	20.0	15.0	0.0	1,491	2%
C-13	4	358	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	3,560	5%
C-14	7	797	LW	SHRUB GC LW	DRIP LINE 12"	0.3	0.81	0.9	0.4	2	2	0.0	0.0	10.0	11.0	13.0	13.0	14.0	14.0	13.0	10.0	7.0	0.0	7,925	10%
	TOTAL	7,891																					TOTAL	78,460	100%

SPECIAL LANDSCAPE AREAS

HYDROZONE #	HYDROZONE NAME	AREA (sq.ft) (HA)	Percentage of Landscape
			0%

MAWA	GALLONS/YR	95,329
	ACRE FEET/YR	0.29
	HCF/YR	127.44
ETWU	GALLONS/YR	78,460
	ACRE FEET/YR	0.24
	HCF/YR	104.89

SITE IRRIGATION EFFICIENCY	SITE PLANT FACTOR	MAWA COMPLIANT
81.0%	0.30	YES

ETAF Calculations	
REGULAR LANDSCAPE AREAS	
TOTAL ETAF x AREA	2,923
TOTAL AREA	7,891
AVG. ETAF	37.04%

THE IRRIGATION VALVE SCHEDULE SHOWN ABOVE IS INTENDED TO BE USED AS A GUIDELINE ONLY AND INDICATES THE APPROXIMATE RUN TIMES IN MINUTES FOR EACH VALVE BASED ON ESTIMATED WEEKLY WATER REQUIREMENTS FOR ESTABLISHED PLANT MATERIAL. THE TIMES SHOWN ARE APPROXIMATE AND HAVE BEEN DEVELOPED FROM LOCAL AND CURRENT AVERAGES FOR EVAPOTRANSPIRATION, AND REFLECTTHE WATER REQUIREMENTS OF THE PLANT MATERIAL BASED ON PLANT TYPE AND THE APPROXIMATE PRECIPITATION OR APPLICATION RATES OF THE IRRIGATION SYSTEM TYPE. ACTUAL RUN TIMES MAY BE DIFFERENT DEPENDING ON A VARIETY OF FACTORS INCLUDING TOPOGRAPHY, SOIL STRUCTURE, SUN AND WIND EXPOSURE, WEATHER, ACTUAL PLANT WATER REQUIREMENTS, OVERALL PRECIPITATION RATE OF ZONE, ETC.

MAWA FORMULA

MAXIMUM APPLIED WATER ALLOWANCE (MAWA) GALLONS PER YEAR

MAWA = (ETo)(0.62)[(LA x 0.45) + (0.55 x SLA)]

ETo = REFERENCE EVAPOTRANSPIRATION

0.45= ET ADJUSTMENT FACTOR

LA=LANDSCAPED AREA (SQUARE FEET)
0.62 = CONVERSION FACTOR (GALLONS/SQ.FT/YR)

ETWU FORMULA

ESTIMATED TOTAL WATER USE (ETWU) GALLONS PER YEAR

ETWU= ((ETO)(.62)(ETAF x LA))

ETo = REFERENCE EVAPOTRANSPIRATION

PF = PLANT FACTOR FOR HYDROZONES

HA = HYDROZONE AREA (SQ.FT)
0.62 = CONVERSION FACTOR (GALLONS/SQ.FT/YR)

IE = IRRIGATION EFFICIENCY (0.81)-BUBBLER/DRIP

IE = IRRIGATION EFFICIENCY (0.75)-ROTORS/SPRAY

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3	12/10/21	PLANNING COMMENTS
2	11/04/21	PLANNING COMMENTS
1	09/24/21	PLANNING COMMENTS
	06/16/21	PLANNING SUBMITTAL

REVISIONS

Drawing Title
IRRIGATION DETAILS, WATER USAGE CALCULATIONS & SCHEDULES

Job No.	Drawn
21-026	IS
Scale: NTS	Date: 11/04/21

Sheet No.
L-4.5



Bulbine frutescens 'Tiny Tangerine'



Sedum moranense



Senecio serpens



Sedum ellacombianum



Teucrium chamaedrys



Sedum hybrid 'Immergrunchen'



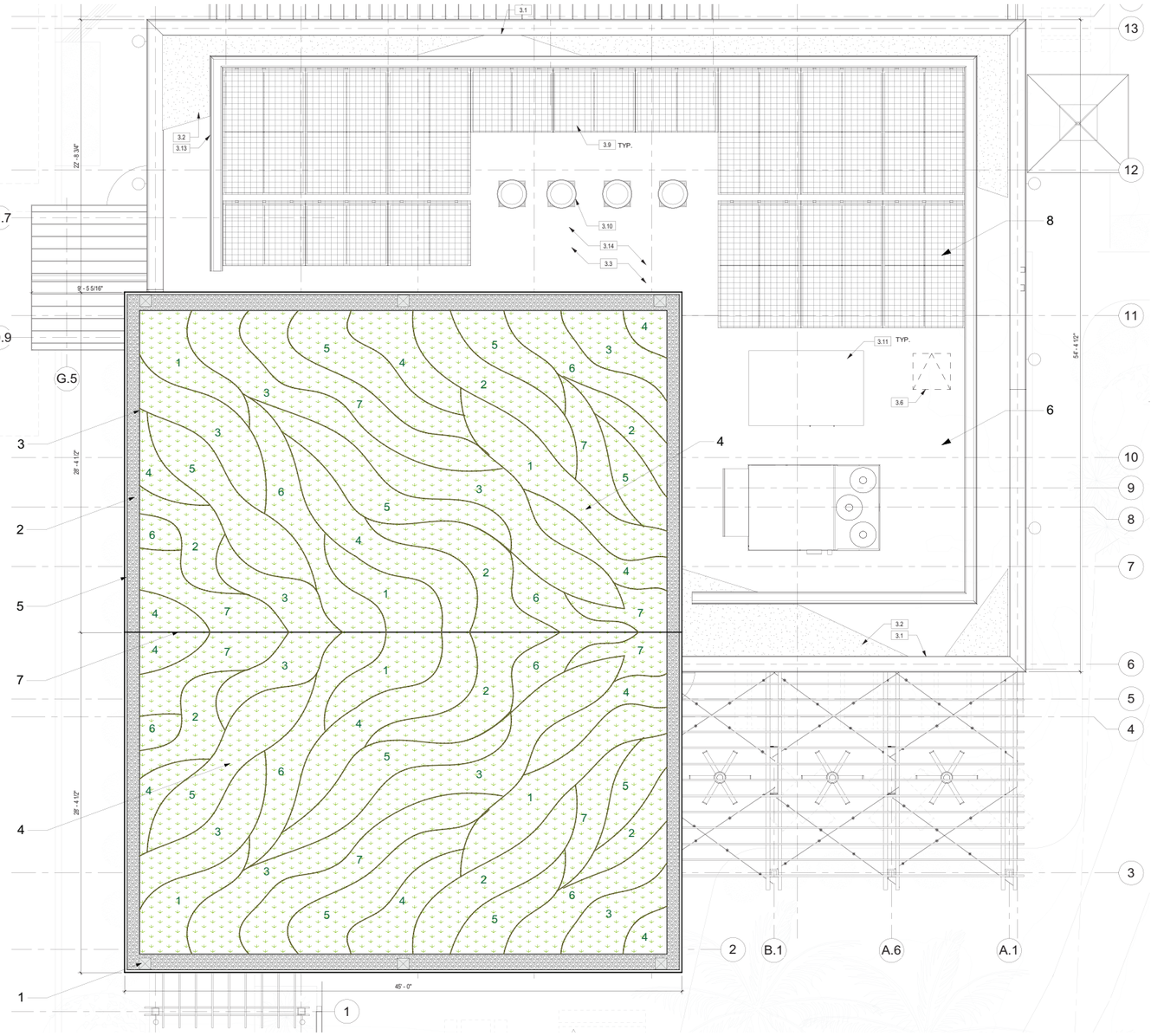
Sedum hybrid 'Plum dazzled'



Tulbaghia violacea 'White'

KEY NOTES - ROOF PLAN

#	Botanical name	Common Name	Wucols	Drought Tolerant
1	Sedum ellacombianum	Japanese Stonecrop	L	Y
2	Senecio serpens	Blue Chalksticks	L	Y
3	Sedum moranense	Red Stonecrop	L	Y
4	Bulbine frutescens	Cat's Tail	L	Y
5	Teucrium chamaedrys	Wall Germander	L	Y
6	Sedum 'Immergrunchen'	Stonecrop	L	Y
7	Sedum 'Plum Dazzeled'	Stonecrop	L	Y



1 ROOF PLAN - MAIN BUILDING
N.T.S. Planting plan - schematic

KEY NOTES - ROOF PLAN

1 Inspection chamber over roof drains

2 Ballast - non-vegetative zone gravel - drain rock

3 Edge restraint system

4 Vegetative planted area

5 Roof curb

6 Lower flat roof

7 Ridge

8 PV solar array - below

9 Access ladder

LEGEND - ROOF PLAN

Non-vegetative - ballast zones

Vegetative roofing system

PLANTING CONCEPT
LIVING ROOF

Overall the planting scheme will provide a diverse, interesting and pollinator-friendly vegetative rooftop landscape. All of the plants will provide year-round interest (evergreen) while also expressing seasonal changes. A diversity of form, texture, color and flower types among the species will create an artful dynamic landscape while being environmentally responsive to the site's location.

Plant species will be chosen to foster healthy plant communities and successful roof coverage. The selected plant species are a mix of hardy succulents with some perennials. The succulent plant species that were selected are both cold and drought hardy.

Sebastopol CA 95465
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PLAN NORTH

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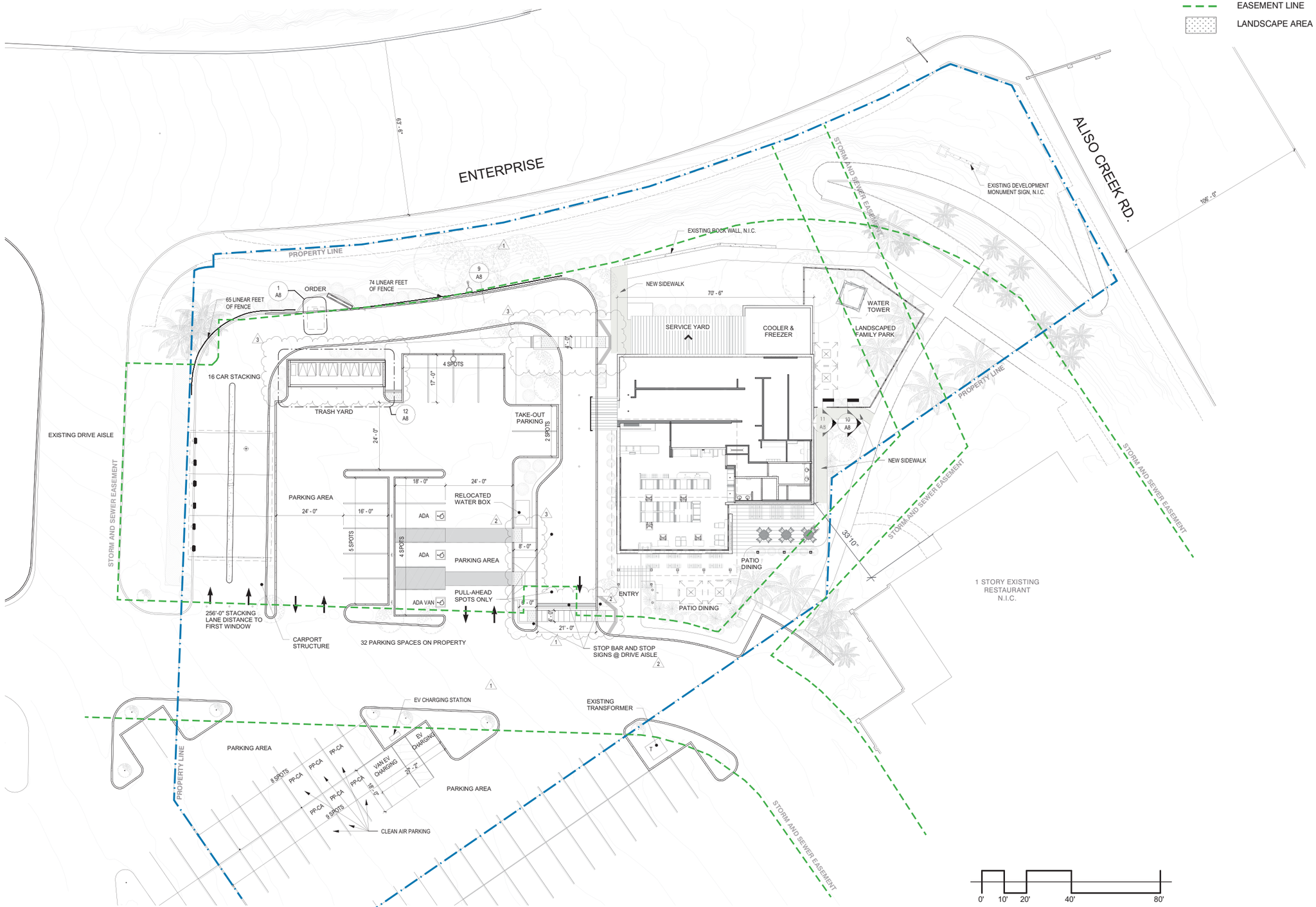
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REVISIONS

Drawing Title
ROOF PLAN
LIVING ROOF
VEGETATIVE BUILDING SYSTEM

Job No.	Drawn
214691	KF
Scale	Date
PER PLAN	11/04/21

Sheet No.
LR-1



1 SITE PLAN
1/16" = 1'-0"

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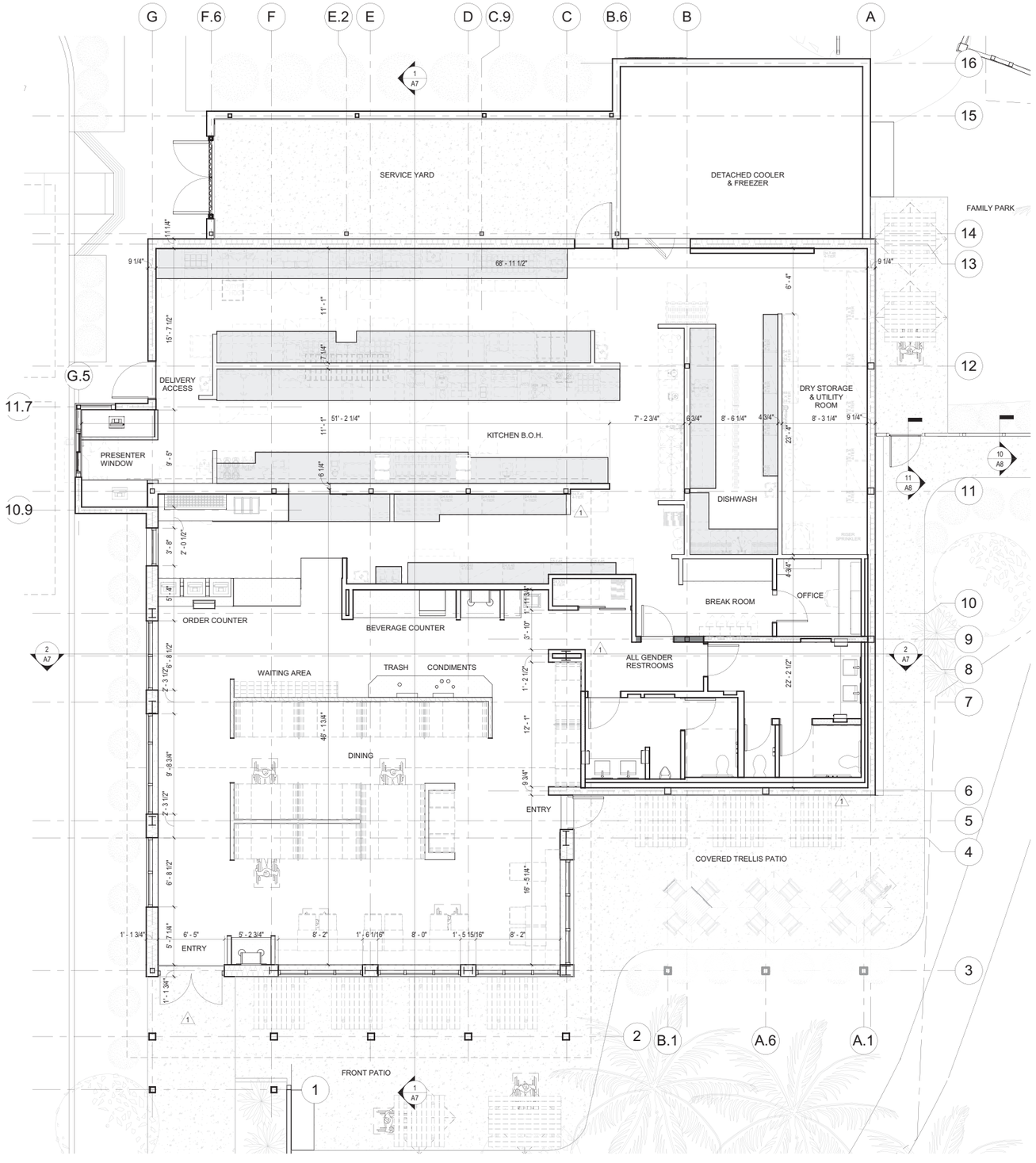
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REVISIONS

Drawing Title
SITE PLAN

Job No.	Drawn
214691	
Scale	**Date**
PER PLAN	11/04/21

Sheet No.
A1



1 FLOOR PLAN
3/16" = 1'-0"

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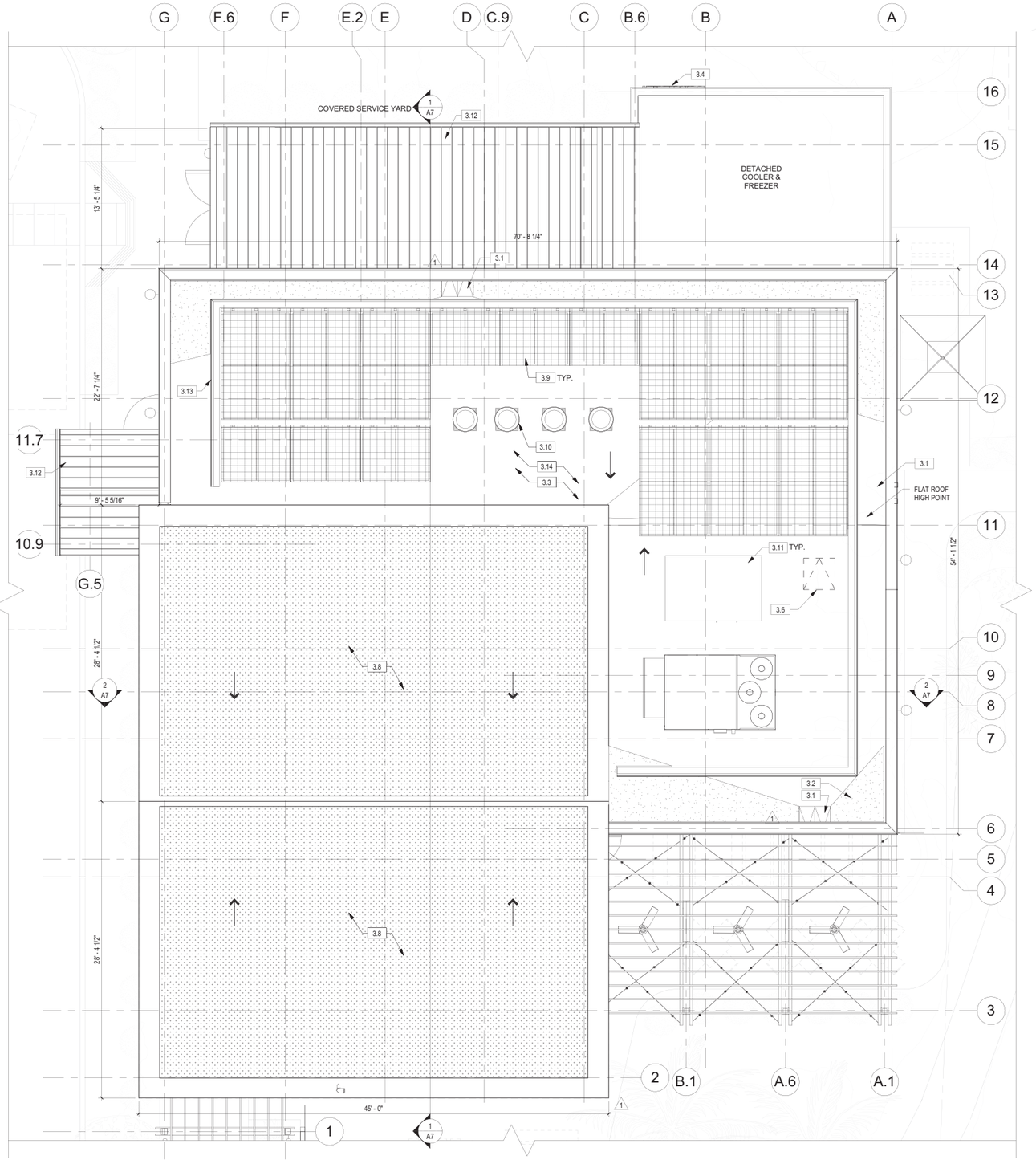
REVISIONS

Drawing Title
FLOOR PLAN

Job No.	Drawn
214691	

Scale	Date
PER PLAN	11/04/21

Sheet No.
A2



1 ROOF PLAN
3/16" = 1'-0"

KEYNOTES

X	
3.1	ROOF LEADERS IN WALL.
3.2	BUILT UP, TAPERED, RIGID INSULATION TO CREATE 1/4" PER 12" SLOPE."
3.3	LOCATE WALKWAY TREADS SURROUNDING ROOFTOP EQUIPMENT WITH OWNERSHIP, REFER TO DETAIL 7/A3.2.
3.4	EXTERIOR SIGNAGE BY OWNER'S VENDOR, SHOWN DASHED. REFER TO EXTERIOR ELEVATIONS. REFER TO E-SHEETS FOR POWER INFORMATION. G.C. TO PROVIDE BACKING AS NEC."
3.6	ROOF HATCH.
3.8	VEGETATIVE ROOF SYSTEM OVER COLD APPLIED POLYURETHANE-BASED WATERPROOFING SYSTEM.
3.9	PHOTOVOLTAIC PANELS.
3.10	HOOD EXHAUST, REFER TO M-SHEETS.
3.11	MECHANICAL ROOFTOP EQUIPMENT, REFER TO M-SHEETS.
3.12	STANDING SEAM METAL ROOF.
3.13	ROOFTOP EQUIPMENT SCREEN WALL.
3.14	SIKAPLAN ROOFING MEMBRANE FASTENED 60 ENERGYSMART WHITE - WITH A MINIMUM TOTAL SOLAR REFLECTANCE OF 0.70 WHEN TESTED IN ACCORDANCE WITH ASTM C1549, ASTM E903, ASTM E1175, OR ASTM E1918 AND A MINIMUM SOLAR EMITTANCE OF 0.75 WHEN TESTED IN ACCORDANCE WITH ASTM C835, ASTM C1371 OR ASTM E408.

GENERAL NOTES

1. ROOFER AND MECHANICAL CONTRACTOR TO VERIFY ALL ROOF ELEMENTS PRIOR TO CONSTRUCTION AND NOTIFY ARCHITECT AND MECHANICAL ENGINEER OF ANY INCONSISTENCIES PRIOR TO COMMENCING SCOPE OF WORK.
2. CONTRACTOR TO VERIFY LOCATIONS OF ALL ROOF PENETRATIONS, INCLUDING BUT NOT LIMITED TO ROOF VENTS, ROOF TOP UNITS, PITCH BOXES, AND ROOF HATCH OPENING.
3. ALL PENETRATIONS THROUGH ROOF BY ROOFING CONTRACTOR - COORDINATE FLASHING DETAILS WITH EXISTING ROOF WARRANTIES.
4. ALL WOOD THAT IS USED ON THE PROJECT SHALL CONFORM WITH SECTION 603 OF THE INTERNATIONAL BUILDING CODE WITH RELATION TO FIRE TREATED WOOD CONSTRUCTION. PER THIS SECTION IT DOES NOT INCLUDE: INTERIOR FLOOR FINISHES OR INTERIOR FINISHES, TRIM AND MILLWORK SUCH AS DOORS, DOOR FRAMES, WINDOW SASHES, AND WINDOW FRAMES.
5. REFER TO MECHANICAL DRAWINGS FOR EXACT LOCATIONS OF ROOF-TOP EQUIPMENT AND PLUMBING CONNECTIONS.
6. VERIFY ALL MECHANICAL UNIT OPENING DIMENSIONS & LOCATIONS IN FIELD PRIOR TO INSTALLATION, TYP.

SYMBOLS LEGEND

SLOPE →	DIRECTION OF SLOPE
	PLANTING AREA
	SOLAR PANELS
	STANDING SEAM METAL CANOPY

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REVISIONS

Drawing Title
ROOF
PLAN

Job No.	Drawn
214691	

Scale	Date
PER PLAN	11/04/21

Sheet No.
A3

N



2 EXTERIOR ELEVATION - SOUTH
3/16" = 1'-0"

M-1:
WESTERN STATES METAL
FASCIA
COLOR: ASH GRAY

M-2:
STANDING SEAM ROOF
WESTERN STATES METAL ROOFING
COLOR: ASH GRAY

R-1:
VEGETATED ROOF

FS-1:
STO - STUCCO
SW- 6290 ROSE

WD-1:
CEDAR BOARD & BATTEN
MINWAX GREY
EXTERIOR WOOD STAIN

WD-2:
CEDAR WOOD
MINWAX GREY
EXTERIOR WOOD STAIN

WD-3:
CEDAR WOOD
FENCE, CLEAR
WOOD STAIN

P-1:
SHERWIN WILLIAMS
SW-6902
DESICIVE YELLOW
FLAG PAINT

P-2:
SHERWIN WILLIAMS
SW-6767
AQUARIUM
METAL COPING -
FLAG PAINT



1 EXTERIOR ELEVATION - WEST
3/16" = 1'-0"

SIGNAGE IS CONCEPTUAL ONLY AND MAY BE CHANGE TO MEET SIGN PROGRAM REQUIREMENTS

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REVISIONS

Drawing Title
EXTERIOR ELEVATIONS

Job No.	Drawn
214691	

Scale	Date
PER PLAN	11/04/21

Sheet No.
A5



2 EXTERIOR ELEVATION - NORTH
3/16" = 1'-0"

T/SLOPED ROOF 126'-0"
T/ SCREEN 121'-0"
T/ PARAPET 115'-3"
H.P SLOPED ROOF 114'-0"
L.P SLOPED ROOF 110'-4"
T/SLAB 100'-0"


M-1:
WESTERN STATES METAL
FASCIA
COLOR: ASH GRAY


M-2:
STANDING SEAM ROOF
WESTERN STATES METAL ROOFING
COLOR: ASH GRAY


R-1:
VEGETATED ROOF


FS-1:
STO - STUCCO
SW- 6290 ROSE


WD-1:
CEDAR BOARD & BATTEN
MINWAX GREY
EXTERIOR WOOD STAIN


WD-2:
CEDAR WOOD
MINWAX GREY
EXTERIOR WOOD STAIN


WD-3:
CEDAR WOOD
FENCE, CLEAR
WOOD STAIN


P-1:
SHERWIN WILLIAMS
SW-6902
DESICIVE YELLOW
FLAG PAINT


P-2:
SHERWIN WILLIAMS
SW-6767
AQUARIUM
METAL COPING -
FLAG PAINT



1 EXTERIOR ELEVATION -EAST
3/16" = 1'-0"

T/TOWER 128'-4"
T/SLOPED ROOF 126'-0"
T/ SCREEN 121'-0"
T/ PARAPET 115'-3"
B/SLOPED ROOF 113'-4"
T/TRELLIS 112'-10"
B/TRELLIS 112'-0"
T/SLAB 100'-0"

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1	09/24/21	PLANNING COMMENTS
	06/16/21	PLANNING SUBMITTAL

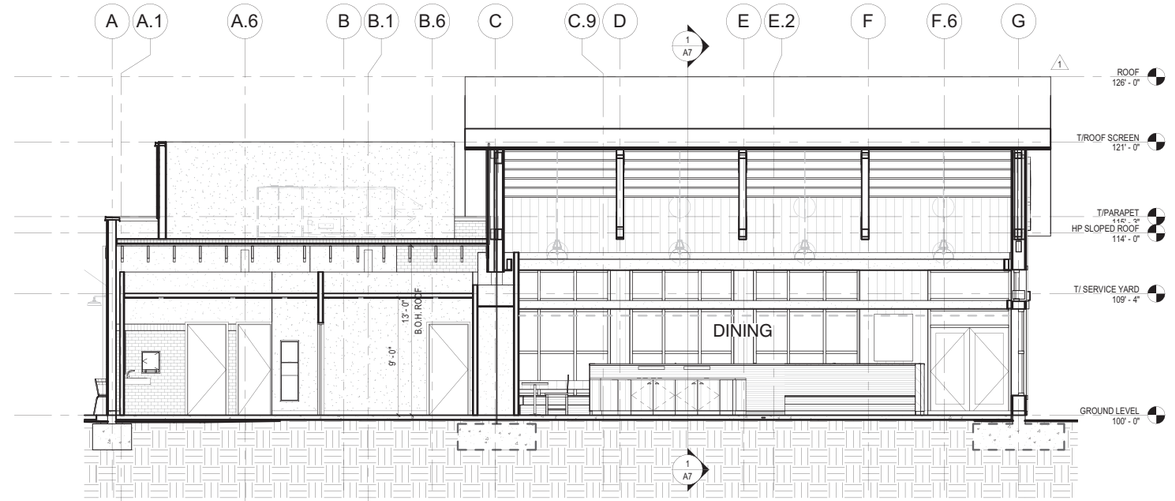
REVISIONS

Drawing Title
EXTERIOR ELEVATIONS

Job No.	Drawn
214691	

Scale	Date
PER PLAN	11/04/21

Sheet No.
A6



2 BUILDING SECTION
3/16" = 1'-0"



1 BUILDING SECTION
1/4" = 1'-0"

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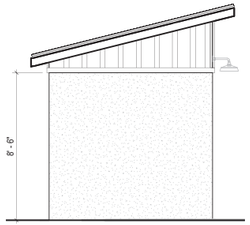
REVISIONS

Drawing Title
BUILDING SECTION

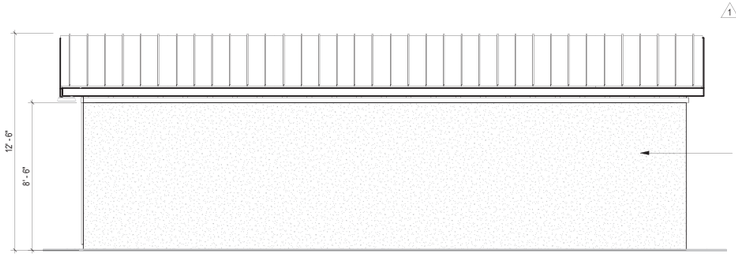
Job No.	Drawn
214691	

Scale	Date
PER PLAN	11/04/21

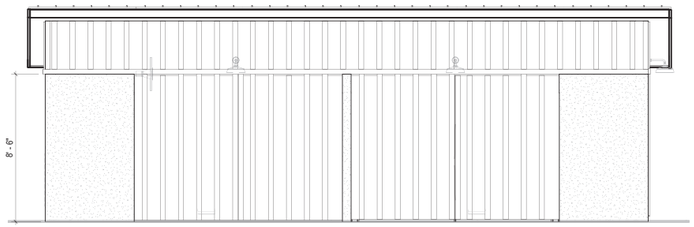
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A7



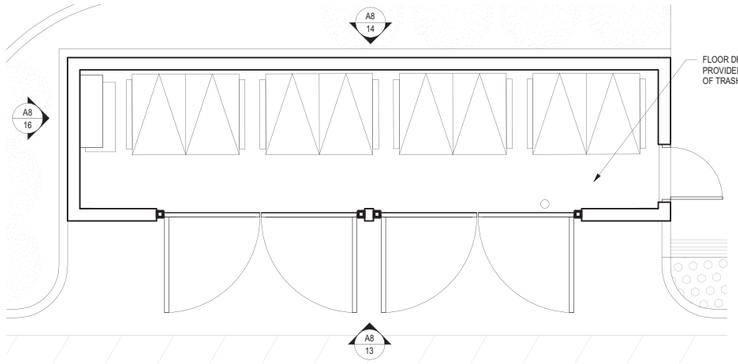
16 TRASH SIDE ELEVATION
1/4" = 1'-0"



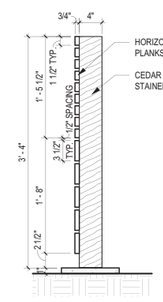
14 TRASH ENCLOSURE ELEVATION
1/4" = 1'-0"



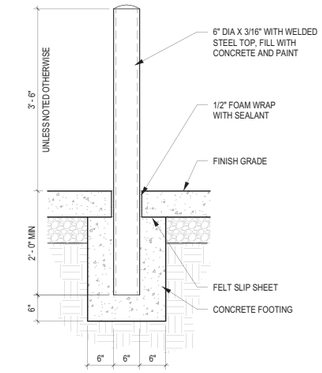
13 TRASH ENCLOSURE ELEVATION
1/4" = 1'-0"



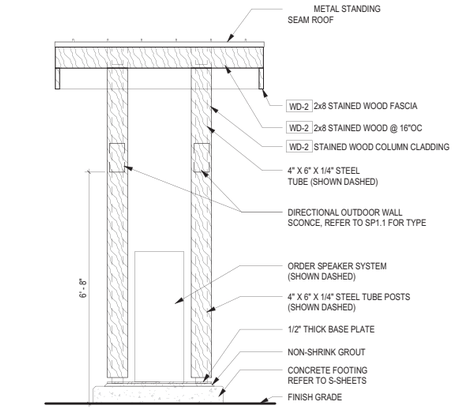
12 TRASH ENCLOSURE PLAN
1/4" = 1'-0"



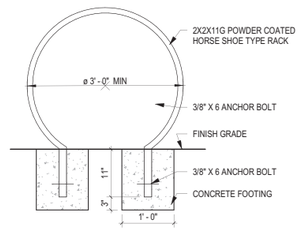
9 SITE FENCE DETAIL
1" = 1'-0"



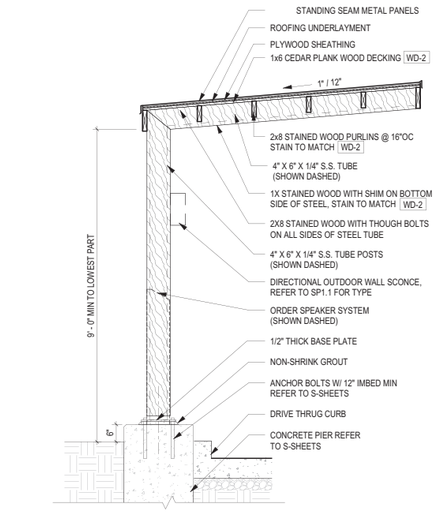
6 BOLLARD DETAIL
3/4" = 1'-0"



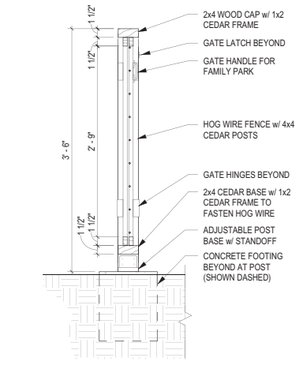
3 ORDERING CANOPY ELEVATION
1/2" = 1'-0"



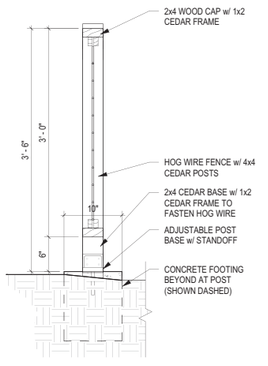
5 BIKE RACK
3/4" = 1'-0"



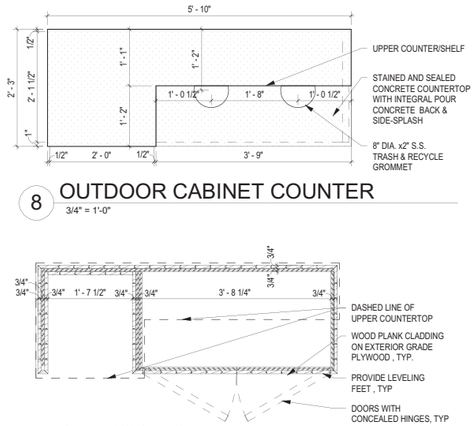
2 ORDERING CANOPY SECTION
1/2" = 1'-0"



11 GATE DETAIL
1" = 1'-0"

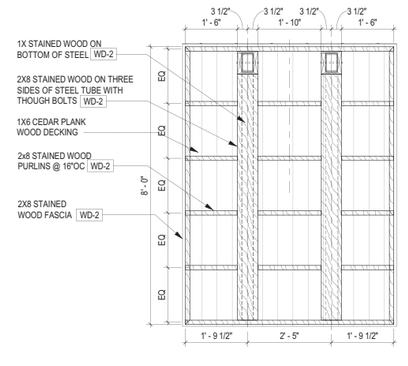


10 HOG WIRE FENCE DETAIL
1" = 1'-0"

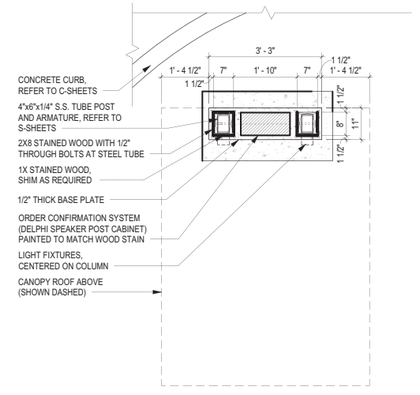


8 OUTDOOR CABINET COUNTER
3/4" = 1'-0"

7 OUTDOOR CABINET
3/4" = 1'-0"



4 ORDERING CANOPY CEILING PLAN
1/2" = 1'-0"



1 ORDERING CANOPY PLAN
1/2" = 1'-0"

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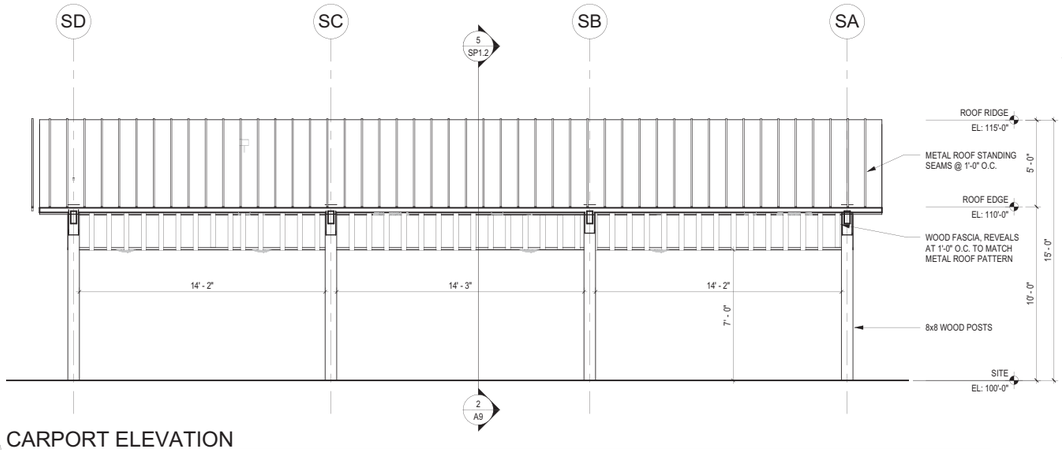
REVISIONS

Drawing Title
SITE
DETAILS

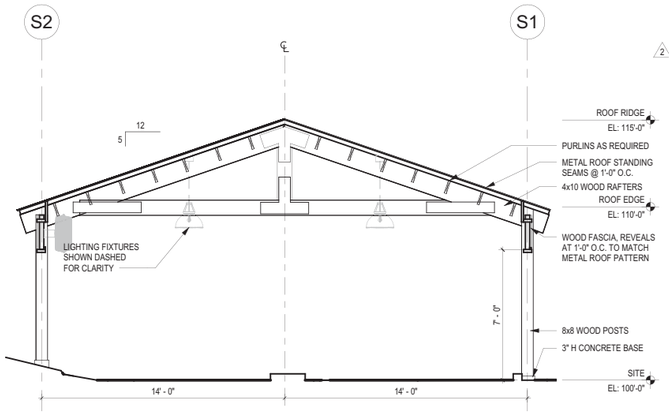
Job No.	Drawn
214691	

Scale	Date
PER PLAN	11/04/21

Sheet No.
A8



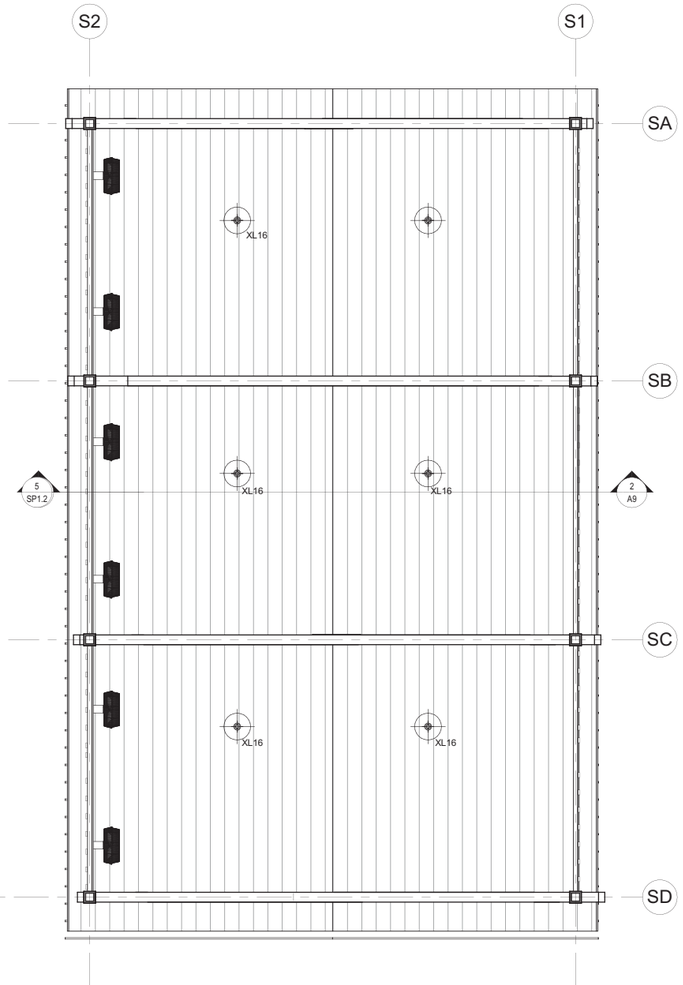
4 CARPORT ELEVATION
1/4" = 1'-0"



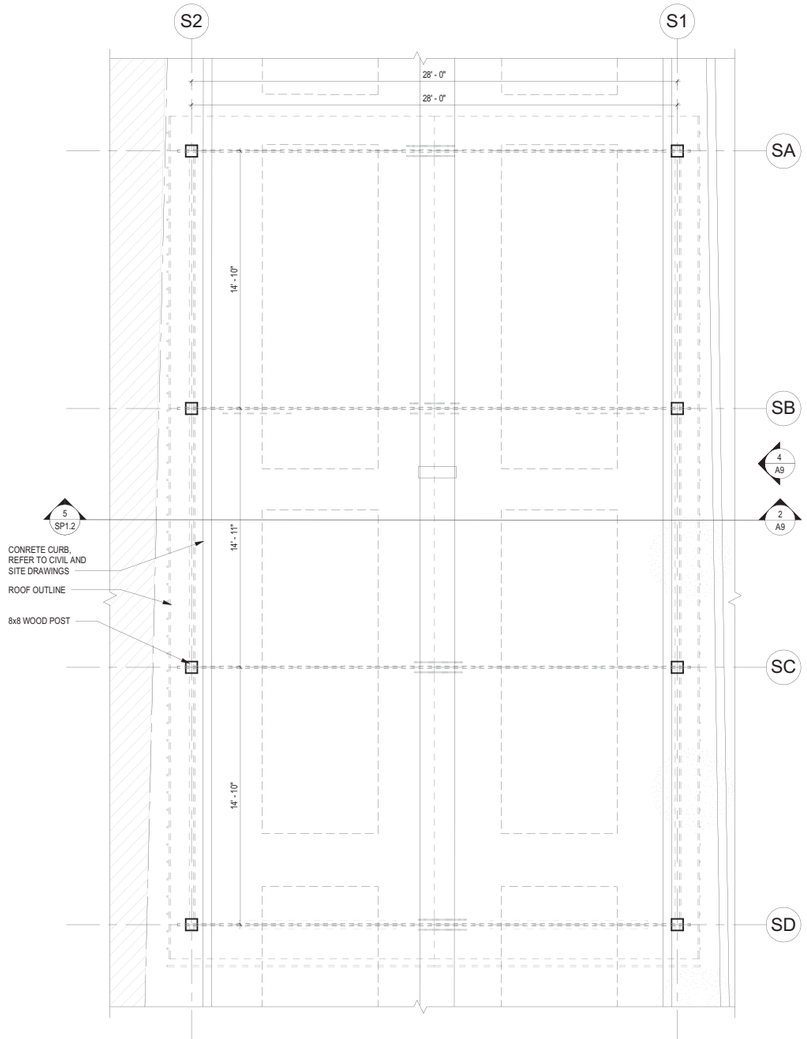
2 CARPORT SECTION
1/4" = 1'-0"



CARPORT & TRASH ENCLOUSURE VIEW



3 CARPORT REFLECTED CEILING PLAN
1/4" = 1'-0"



1 CARPORT PLAN
1/4" = 1'-0"

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REVISIONS

Drawing Title
DESIGN
DETAILS

Job No. 214691
Drawn
Scale PER PLAN
Date 11/04/21

Sheet No.
A9



4 SOUTH ENTRY VIEW
N.T.S



3 FRONT PATIO VIEW
N.T.S.



2 SOUTHWEST VIEW
N.T.S.



1 NORTHEAST VIEW
N.T.S.

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Drawing Title
PERSPECTIVE VIEWS

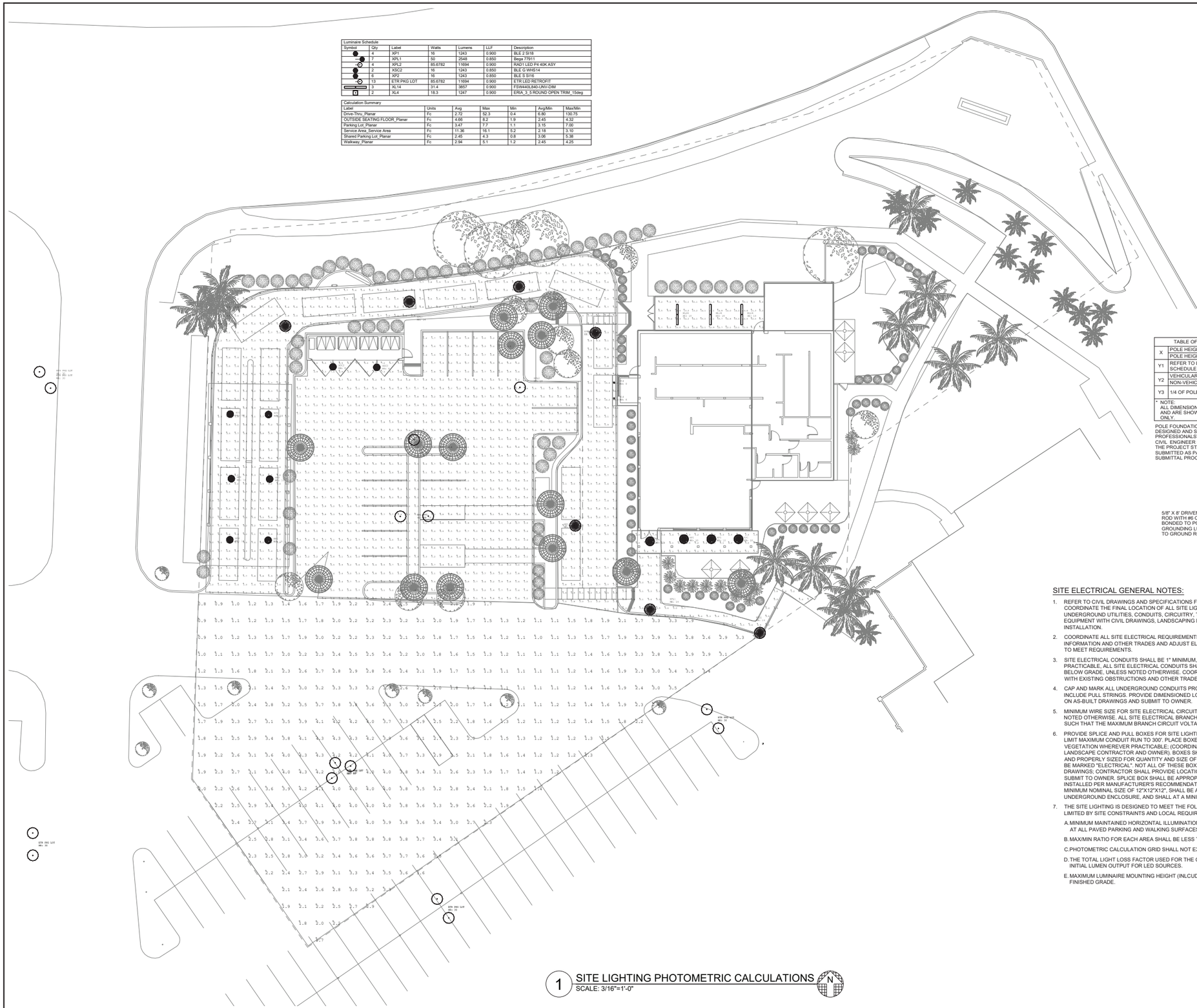
Job No.	Drawn
214691	

Scale	Date
PER PLAN	11/04/21

Sheet No.
A10

Luminaire Schedule						
Symbol	Qty	Label	Watts	Lumens	LLF	Description
	4	XP1	16	1243	0.900	BLE 2 SI18
	7	XPL1	50	2548	0.850	Bega 77911
	4	XPL2	85.6782	11694	0.900	RAD1 LED P4 40K ASY
	2	XSC2	16	1243	0.850	BLE G WHS14
	6	XP2	16	1243	0.850	BLE S SI16
	13	ETR PKG LOT	85.6782	11694	0.900	ETR LED RETROFIT
	3	XL14	31.4	3857	0.900	FSW40L840-UNV-DIM
	2	XL4	18.3	1247	0.900	ERA_3_5 ROUND OPEN TRIM_15deg

Calculation Summary						
Label	Units	Avg	Max	Min	Avg/Min	Max/Min
Drive-Thru_Planar	Fc	2.72	52.3	0.4	6.80	130.75
OUTSIDE SEATING FLOOR_Planar	Fc	4.66	8.2	1.9	2.45	4.32
Parking Lot_Planar	Fc	3.47	7.7	1.1	3.15	7.00
Service Area_Service Area	Fc	11.36	16.1	5.2	2.18	3.10
Shared Parking Lot_Planar	Fc	2.45	4.3	0.8	3.06	5.38
Walkway_Planar	Fc	2.94	5.1	1.2	2.45	4.25



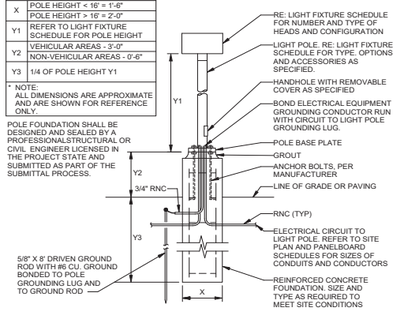
1 SITE LIGHTING PHOTOMETRIC CALCULATIONS
SCALE: 3/16"=1'-0"

EV Charging Space Calculation per 2019 CalGreen Table 5.106.5.3.3	
Total Number of Parking Spaces	Required EV Charging Spaces
0-9	0
10-25	1
26-50	2
51-75	4
76-100	5
101-150	7
151-200	10
201 and over	6% of Total
Parking Spaces Provided	EV Charging Spaces Provided
50	4

TABLE OF DIMENSIONS*	
X	POLE HEIGHT < 16' = 1'-0"
	POLE HEIGHT > 16' = 2'-0"
Y1	REFER TO LIGHT FIXTURE SCHEDULE FOR POLE HEIGHT
Y2	VEHICULAR AREAS - 3'-0"
	NON-VEHICULAR AREAS - 0'-6"
Y3	1/4 OF POLE HEIGHT Y1

* NOTE:
ALL DIMENSIONS ARE APPROXIMATE AND ARE SHOWN FOR REFERENCE ONLY.

POLE FOUNDATION SHALL BE DESIGNED AND SEALED BY A PROFESSIONALSTRUCTURAL OR CIVIL ENGINEER LICENSED IN THE PROJECT STATE AND SUBMITTED AS PART OF THE SUBMITTAL PROCESS.



3 POLE BASE DETAIL
NTS

SITE ELECTRICAL GENERAL NOTES:

1. REFER TO CIVIL DRAWINGS AND SPECIFICATIONS FOR ADDITIONAL INFORMATION. COORDINATE THE FINAL LOCATION OF ALL SITE LIGHTING POLES, SIGNAGE, UNDERGROUND UTILITIES, CONDUITS, CIRCUITRY, TRANSFORMERS AND OTHER EQUIPMENT WITH CIVIL DRAWINGS, LANDSCAPING DRAWINGS AND OWNER PRIOR TO INSTALLATION.
2. COORDINATE ALL SITE ELECTRICAL REQUIREMENTS WITH EQUIPMENT MANUFACTURER INFORMATION AND OTHER TRADES AND ADJUST ELECTRICAL PROVISIONS AS REQUIRED TO MEET REQUIREMENTS.
3. SITE ELECTRICAL CONDUITS SHALL BE 1" MINIMUM, UNLESS NOTED OTHERWISE. WHERE PRACTICABLE, ALL SITE ELECTRICAL CONDUITS SHALL BE INSTALLED A MINIMUM OF 24" BELOW GRADE, UNLESS NOTED OTHERWISE. COORDINATE FINAL CONDUIT ROUTING WITH EXISTING OBSTRUCTIONS AND OTHER TRADES AND ADJUST AS NECESSARY.
4. CAP AND MARK ALL UNDERGROUND CONDUITS PROVIDED FOR FUTURE USE AND INCLUDE PULL STRINGS. PROVIDE DIMENSIONED LOCATIONS OF TERMINATION POINTS ON AS-BUILT DRAWINGS AND SUBMIT TO OWNER.
5. MINIMUM WIRE SIZE FOR SITE ELECTRICAL CIRCUITS SHALL BE [#10] AWG CU, UNLESS NOTED OTHERWISE. ALL SITE ELECTRICAL BRANCH CIRCUIT WIRING SHALL BE SIZED SUCH THAT THE MAXIMUM BRANCH CIRCUIT VOLTAGE DROP IS LESS THAN [3] PERCENT.
6. PROVIDE SPLICE AND PULL BOXES FOR SITE LIGHTING AND SITE ELECTRICAL POWER TO LIMIT MAXIMUM CONDUIT RUN TO 300'. PLACE BOXES IN A PLANTER AREA CLEAR OF VEGETATION WHEREVER PRACTICABLE; (COORDINATE FINAL LOCATION WITH CIVIL, LANDSCAPE CONTRACTOR AND OWNER). BOXES SHALL BE SUITABLE FOR LOCATION AND PROPERLY SIZED FOR QUANTITY AND SIZE OF CONDUITS IN AND OUT AND SHALL BE MARKED "ELECTRICAL". NOT ALL OF THESE BOXES ARE SHOWN ON SITE ELECTRICAL DRAWINGS; CONTRACTOR SHALL PROVIDE LOCATION ON AS-BUILT DRAWINGS AND SUBMIT TO OWNER. SPLICE BOX SHALL BE APPROPRIATE FOR LOCATION AND SHALL BE INSTALLED PER MANUFACTURER'S RECOMMENDATIONS. SPLICE BOX SHALL HAVE A MINIMUM NOMINAL SIZE OF 12"X12"X12", SHALL BE AN OPEN BOTTOM NRTL LISTED UNDERGROUND ENCLOSURE, AND SHALL AT A MINIMUM BE TIER 15 TRAFFIC RATED.
7. THE SITE LIGHTING IS DESIGNED TO MEET THE FOLLOWING CRITERIA EXCEPT WHERE LIMITED BY SITE CONSTRAINTS AND LOCAL REQUIREMENTS:
   A. MINIMUM MAINTAINED HORIZONTAL ILLUMINATION LEVEL AT FINISHED GRADE OF 1 FC AT ALL PAVED PARKING AND WALKING SURFACES.
   B. MAX/MIN RATIO FOR EACH AREA SHALL BE LESS THAN 15:1.
   C. PHOTOMETRIC CALCULATION GRID SHALL NOT EXCEED A 5' X 5' SPACING.
   D. THE TOTAL LIGHT LOSS FACTOR USED FOR THE CALCULATIONS SHALL BE [.85] OF INITIAL LUMEN OUTPUT FOR LED SOURCES.
   E. MAXIMUM LUMINAIRE MOUNTING HEIGHT (INLCUDING POLE AND BASE) OF 15' ABOVE FINISHED GRADE.

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REVISIONS

Drawing Title
SITE PHOTOMETRIC PLAN

Job No. HEI 2150003467
Drawn HL
Scale PER PLAN
Date 11/04/21

Sheet No.
E1.0

PROJECT DESCRIPTION

The applicant, Amy's Drive-Thru, is requesting the City of Aliso Viejo's consideration of discretionary approvals to allow for the construction of a Amy's Drive-Thru Restaurant (Project) at 26641 Aliso Creek Road in the Aliso Viejo Town Center Shopping Center. The proposed restaurant would be located on the site of the former Macaroni Grill Restaurant. The shopping center is located on the west side of Aliso Creek Road between Enterprise to the north and Pacific Park Drive to the south. The project site is located on the northeast corner of the shopping center.

Project implementation would include the demolition of the vacant, 8,168-square-foot (sf) restaurant building to allow for the construction of a 4,558-sf restaurant with a drive-thru and reconfiguration of surface parking to provide 32 parking stalls. The restaurant with indoor and patio dining would be sited in the general location of the existing building pad with the drive-thru aisle located between the building and the surface parking area. Vehicles would enter the drive aisle for the drive-thru on the west side of the surface parking area, which would wrap around north side of the parking, and exit the drive aisle between the parking area and the east side of the restaurant.

ENVIRONMENTAL REVIEW/COMPLIANCE (CEQA)

The Aliso Viejo Planning Services Department completed an initial environmental assessment of the Amy's Drive-Thru Project per the California Environmental Quality Act (CEQA). Staff recommends the City Council determine the project is Categorically Exempt from CEQA pursuant to State CEQA Guidelines Section 15302 (Class 2: Replacement or Reconstruction). The Project is consistent with the requirements for a Class 2 Categorical Exemption as set forth in CEQA Guidelines 15302(b), "Replacement of a commercial structure with a new structure of substantially the same size, purpose, and capacity."

Article 19 of the State Guidelines for Implementation of the California Environmental Quality Act Guidelines establishes a list of classes of projects that are categorically exempt from the provisions of CEQA, including State CEQA Guidelines Section 15302 (Categorical Exemption Class 2: Replacement or Reconstruction). CEQA Guidelines Section 15302 states:

> Class 2 consists of replacement or reconstruction of existing structures and facilities where the new structure will be located on the same site as the structure replaced and will have substantially the same purpose and capacity as the structure replaced, including but not limited to:
>
> (a) Replacement or reconstruction of existing schools and hospitals to provide earthquake resistant structures which do not increase capacity more than 50 percent.
>
> (b) Replacement of a commercial structure with a new structure of substantially the same size, purpose, and capacity.
>
> (c) Replacement or reconstruction of existing utility systems and/or facilities involving negligible or no expansion of capacity.
>
> (d) Conversion of overhead electric utility distribution system facilities to underground including connection to existing overhead electric utility distribution lines where the surface is restored to the condition existing prior to the undergrounding.

Even if a project is ordinarily exempt under any of the potential categorical exemptions, State CEQA Guidelines Section 15300.2 provides specific instances where exceptions to otherwise applicable exemptions apply. The following text addresses each exception as it relates to the proposed Amy's Drive-Thru Project.

a. **Location.** The exception states, "Classes 3, 4, 5, 6, and 11 are qualified by consideration of where the project is to be located. A project that is ordinarily insignificant in its impact on the environment may in a particularly sensitive environment be significant. Therefore, these classes are considered to apply all instances except where the project may impact an environmental resource of hazardous or critical concern where designated, precisely mapped, and officially adopted pursuant to law by federal, state, or local agencies."

This exception is not applicable for a Class 2 Categorical Exemption. The site is developed within an existing shopping center with no significant resources. As noted below, the project site is not listed on any governmental list of sites with a prior release of hazardous materials.

b. **Cumulative Impact.** This exception states, "All exemptions for these classes are inapplicable when the cumulative impact of successive projects of the same type in the same place, over time, is significant."

The project would not result in a cumulative impact from successive projects of the same type in the same place, over time. The project site and surrounding area are designated for commercial uses. The project involves the redevelopment of a site within the existing Aliso Viejo Town Center Shopping Center with a reduction in square footage from the prior restaurant.

The proposed project is forecast to generate approximately 1,956 daily trips, with 104 trips in the AM peak hour and 75 trips in the PM peak hour. It is important to note that these trip generation does not take into account traffic that was generated by the prior Macaroni Grill Restaurant. The *Traffic Circulation Analysis* (Kimley-Horn, November 2021) concludes that all study area intersections would continue to operate at acceptable levels of service with the project. Because the proposed project can be classified as local-serving commercial and is less than 50,000 sf, a less than significant VMT impact would occur. No project-specific or cumulative traffic impacts would occur. The cumulative impact exception of CEQA Guidelines Section 15300.2(b) does not apply to the Project.

c. **Significant Effect.** The exception states, "A categorical exemption shall not be used for an activity where there is a reasonable possibility that the activity will have a significant effect on the environment due to unusual circumstances."

The proposed project features a restaurant operation with a drive-thru window. The project would allow for the redevelopment of a retail pad, that was previously occupied by a restaurant, in an existing shopping center. Therefore, the exception at State CEQA Guidelines Section 15300.2(c) does not apply to the project.

d. **Scenic Highways.** This exception states, "A categorical exemption shall not be used for a project which may result in damage to scenic resources, including but not limited to trees, historic buildings, rock outcroppings, or similar resources, within a highway officially designated as a state scenic highway."

The project does not contain scenic resources, including trees, historic buildings, rock outcroppings, or similar resources. There are no official-designated or eligible for designation State scenic highways in the City of Aliso Viejo or proximate to the project site.[1]

The City of Aliso Viejo General Plan Conservation/Open Space Element includes two roadway designation regarding scenic resources: Viewscape Corridor and Landscape Corridor. The

[1] https://dot.ca.gov/programs/design/lap-landscape-architecture-and-community-livability/lap-liv-i-scenic-highways, accessed November 17, 2021.

Conservation/Open Space Element identifies Wood Canyon Drive between Boundary Oak and Aliso Creek Road is designated as a Viewscape Corridor. A Viewscape Corridor is "a route that traverses a corridor within which unique or unusual scenic resources and aesthetic values are found. This designation is intended to minimize the impact of the highway and land development upon the significant scenic resources along the route." The project site is not proximate to the Viewscape Corridor.

There are several designated Landscape Corridors in the City including Aliso Creek Road between El Toro Road to the northwest and Alicia Parkway to the southeast. The project site is within the Aliso Viejo Town Center Shopping Center which is adjacent to Aliso Creek Road. The General Plan defines a Landscape Corridor as "a corridor that traverses developed or developing areas and has been designated for special treatment to provide a pleasant driving environment as well as community enhancement". The redevelopment of an existing restaurant parcel within an existing shopping center would not affect the Landscape Corridor designation for Aliso Creek Road.

Because there are no officially designated State Scenic Highways in the City of Aliso Viejo the exception at State CEQA Guidelines Section 15300.2(d) does not apply to the project.

e. **Hazardous Waste Sites.** This exception states, "A categorical exemption shall not be used for a project located on a site which is included on any list compiled pursuant to Section 65962.5 of the Government Code."

The project site is not listed on any governmental list of sites with a prior release of hazardous materials.[2] Therefore, the exception at State CEQA Guidelines Section 15300.2(e) does not apply to the project.

f. **Historical Resources.** A categorical exemption shall not be used for a project which may cause a substantial adverse change in the significance of a historical resource.

No structures at the Aliso Viejo Town Center Shopping Center are 50 years or older. No historic resources have been previously identified or are visible on the site. Therefore, the exception at State CEQA Guidelines Section 15300.2(f) does not apply to the project.

[2] EnviroStar. https://www.envirostor.dtsc.ca.gov/public/search?cmd=search&reporttype=CORTESE&site_type=CSITES,FUDS&status=ACT,BKLG,COM&reporttitle=HAZARDOUS+WASTE+AND+SUBSTANCES+SITE+LIST+%28CORTESE%29. Accessed November 17, 2021.
GeoTracker. https://geotracker.waterboards.ca.gov/search?CMD=search&case_number=&business_name=&main_street_name=&city=&zip=&county=&SITE_TYPE=LUFT&oilfield=&STATUS=&BRANCH=&MASTER_BASE=&Search=Search. Accessed November 17, 2021.

Traffic Circulation Analysis

for

Amy’s Drive Thru

In the City of Aliso Viejo

November, 2021

Kimley»Horn

TRAFFIC CIRCULATION ANALYSIS
FOR THE AMY'S DRIVE THRU PROJECT
IN THE CITY OF ALISO VIEJO

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November, 2021

TRAFFIC CIRCULATION ANALYSIS
FOR THE AMY'S DRIVE THRU PROJECT
IN THE CITY OF ALISO VIEJO

INTRODUCTION

This Traffic Circulation Analysis (TCA) has been prepared to evaluate the project-related traffic associated with the proposed Amy's Drive Thru project located at 26641 Aliso Creek Road in the City of Aliso Viejo. This report has been prepared in accordance with the *Orange County Transportation Implementation Manual (TIM)* (November 2020). This TCA document follows the assumptions established during discussions with City of Aliso Viejo staff and within the approved Scope of Work.

The project location is shown in its regional setting on Figure 1.

PROJECT DESCRIPTION

The project site is bounded by Enterprise to the north, Aliso Creek Road to the east, and existing parking and retail land uses to the west and south. The project site is currently occupied by an approximately 8,168 square-foot "Macaroni Grill" restaurant. The restaurant is vacant.

The applicant proposes to demolish the existing restaurant and develop a 4,558-square-foot fast food restaurant with drive-thru. The proposed site plan is shown on Figure 2. The project will take access via a signalized intersection at Enterprise and Town Center and two unsignalized driveways: one right-in, right-out (RIRO) driveway on Enterprise, and one full movement in, right-out driveway on Aliso Creek Road.

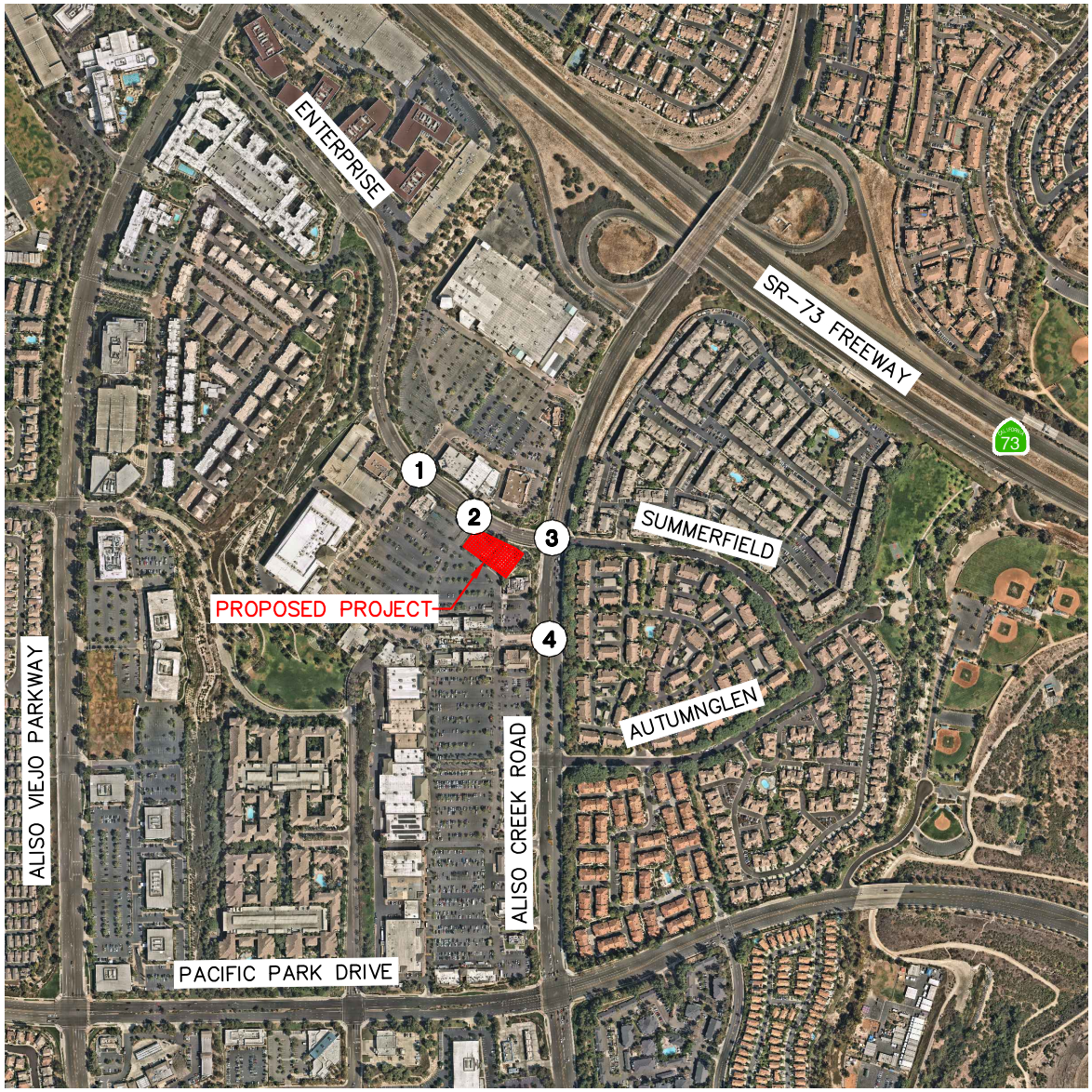
The proposed project would provide a drive-thru lane with one order board and one pay board. The drive-thru lane would begin as double lanes, merging into a single drive-thru lane immediately before the order board, and continuing as a single lane for the remainder of the drive-thru. After the pay window, two pull-ahead spots will be provided for longer/larger orders and to clear a path for other drive-thru patrons to pass by to alleviate congestion. Additionally, a total of 32 parking spaces will be provided for dine-in patrons.

ANALYSIS SCENARIOS AND METHODOLOGY

Analysis Scenarios

Based on Orange County TIM guidelines, and on the approved scope, this traffic analysis provides an evaluation of morning and evening peak hour intersection operations for the following scenarios:

- Existing Conditions
- Opening Year 2022
- Opening Year 2022 Plus Project



NOT TO SCALE

FIGURE 1
VICINITY MAP
SOURCE: NEARMAP

LEGEND:
(X) = Study Intersection

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NOT TO SCALE

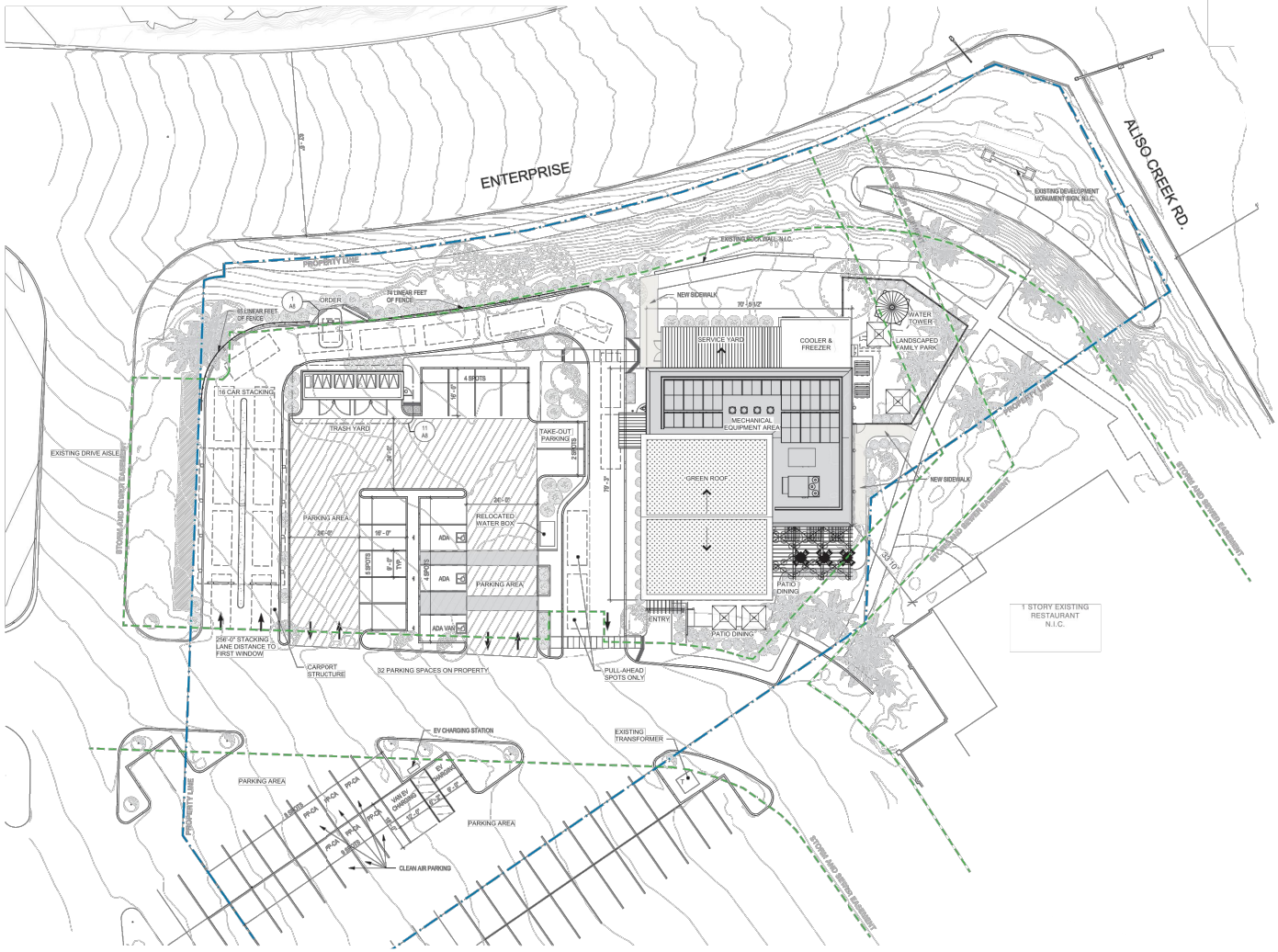


FIGURE 2
SITE PLAN

Study Locations

This traffic circulation analysis includes documentation of existing conditions and analysis of future traffic conditions at the following study intersections:

Existing Intersections:

1. Enterprise at Town Center
2. Enterprise at Project Driveway
3. Aliso Creek Road at Enterprise
4. Aliso Creek Road at Project Driveway

The study locations were established in consultation with City staff.

Intersection Analysis Methodology

Peak hour operating conditions at the study intersections are evaluated using the Intersection Capacity Utilization (ICU) methodology, per the Orange County TIM guidelines. The ICU methodology provides a comparison of the number of vehicles passing through an intersection during a given hour to the theoretical hourly vehicular capacity of that intersection.

The ICU calculation assumes a per-lane capacity of 1,700 vehicles per hour (vph) for each travel lane (through or turning lane) through the intersection, and a capacity of 3,200 vph for dual left-turn lanes. A clearance factor of 0.05 (5%) of the total intersection capacity is included in the ICU calculation to account for the effect of the yellow and all-red phases of the signal cycle.

The ICU calculation returns a volume-to-capacity (V/C) ratio that translates into a corresponding Level of Service (LOS) measure, ranging from LOS A, representing uncongested, free-flowing conditions; to LOS F, representing over-capacity conditions. A summary description of each Level of Service and the corresponding V/C ratio is provided on the chart on the following page.

For unsignalized intersections, the Highway Capacity Manual (HCM) methodology is used. Using the HCM methodology, Level of Service is based on the average stopped delay, expressed in seconds of delay per vehicle, for all movements at signalized and all-way stop-controlled intersections. For one-way or two-way stop-controlled intersections, Level of Service is based on the average delay for the approach with the highest delay. As with the ICU methodology, the average seconds of delay per vehicle translates into a corresponding Level of Service, ranging from LOS A, representing uncongested, free-flowing conditions; to LOS F, representing congested, over-capacity conditions.

The chart below identifies each Level of Service category for both methodologies, and the corresponding intersection capacity utilization or vehicle delay:

LEVEL OF SERVICE DESCRIPTIONS	
Level of Service	Description
A	EXCELLENT – No vehicle waits longer than one red light and no approach phase is fully used.
B	VERY GOOD – An occasional approach phase is fully utilized; many drivers begin to feel somewhat restricted within groups of vehicles.
C	GOOD – Occasionally drivers may have to wait through more than one red light; back-ups may develop behind turning vehicles.
D	FAIR – Delays may be substantial during portions of the rush hours, but enough lower volume periods occur to permit clearing of developing lines, preventing excessive back-ups.
E	POOR – Represents the most vehicles that the intersection approaches can accommodate; may be long lines of waiting vehicles through several signal cycles.
F	FAILURE – Back-ups from nearby locations or on cross streets may restrict or prevent movement of vehicles out of the intersection approaches. Long delays with continuously increasing queue lengths.

Level of Service Ranges			
LOS	ICU Methodology (V/C Ratio)	HCM Methodology (Seconds of delay per vehicle)	
		Signalized	Unsignalized
A	≤ 0.60	≤ 10	≤ 10
B	0.61 – 0.70	> 10 – 20	> 10 – 15
C	0.71 – 0.80	> 20 – 35	> 15 – 25
D	0.81 – 0.90	> 35 – 55	> 25 – 35
E	0.91 – 1.00	> 55 – 80	> 35 – 50
F	> 1.00	> 80	> 50
LOS = Level of Service ICU = Intersection Capacity Utilization HCM = Highway Capacity Manual V/C = volume-to-capacity			

EXISTING TRAFFIC ENVIRONMENT / AREA CONDITIONS

Existing Transportation System

Regional access to the site is provided by the San Joaquin Hill Transportation Corridor/State Route 73 (SR-73), State Route 133 (SR-133), and the Interstate 5 (I-5) Freeway. The SR-73 Freeway is located approximately 0.3 miles to the north of the project site. The SR-133 Freeway is located approximately 2.4 miles west of the project site. The I-5 Freeway is located approximately 2.8 miles to the east of the project site.

Existing lane configurations and traffic controls of the study intersections are shown on Figure 3. Local access to the project vicinity is provided by the following roadways:

Aliso Creek Road is a north-south roadway that forms the eastern boundary of the project site, and provides three travel lanes in each direction. Aliso Creek Road is divided by a raised median south of Enterprise and a painted median north of Enterprise. The posted speed limit is 50 miles per hour (mph), and on-street parking is prohibited on both sides of the street. Aliso Creek Road is classified as a Major Arterial in the City of Aliso Viejo Circulation Element of the General Plan. Aliso Creek Road provides direct access to the project site via an unrestricted ingress, right turn-only egress driveway.

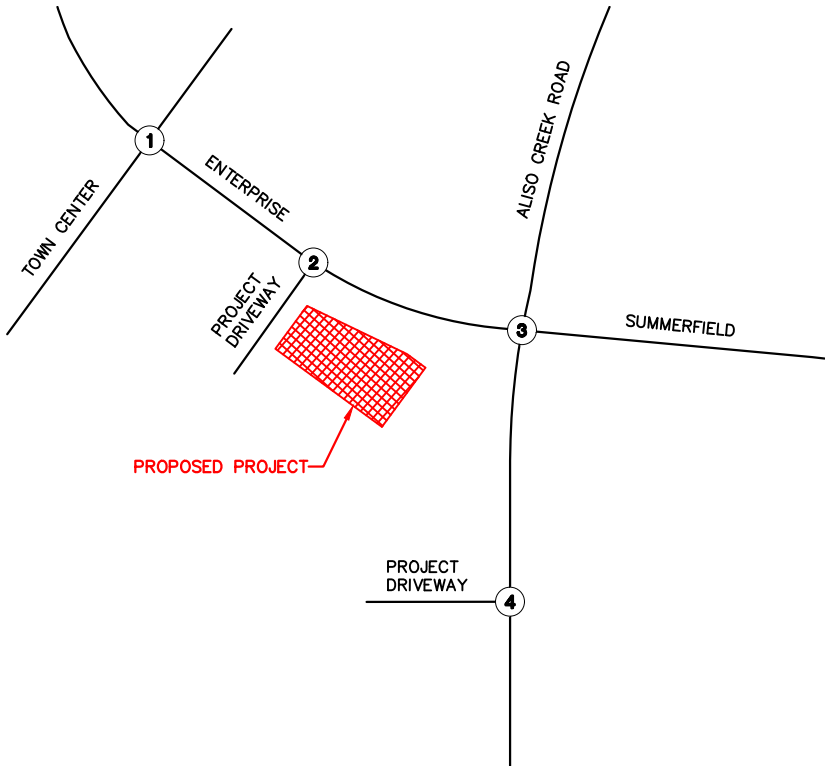
Enterprise is an east-west roadway that forms the northern boundary of the project site. It provides two travel lanes in each direction along the project frontage, and is undivided. The posted speed limit is 40 miles per hour (mph), and on-street parking is prohibited on both sides of the street.

Existing Traffic Volumes

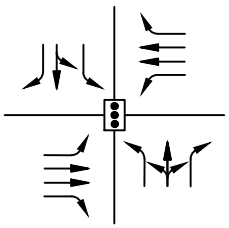
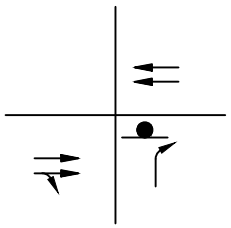
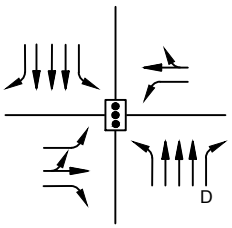
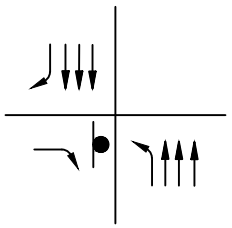
Existing morning peak period (7:00 to 9:00 AM) and evening peak period (4:00 to 6:00 PM) turning movement counts were collected for all study intersections. The counts were completed in November 2021, with concurrence from City staff. Per discussion with City staff, it was determined that current traffic trends have reverted to "normal" conditions prior to the COVID-19 pandemic. Therefore, a factor was not applied to the turning movement counts to account for potential changes to standard traffic volumes resulting from COVID. Existing peak hour turning movement volumes at the study intersections are shown in Figure 4. Peak hour intersection traffic count worksheets are provided in *Appendix A*.

Existing Operating Conditions

Intersection Level of Service analysis was conducted for the morning and evening peak hours using the analysis procedures and assumptions described previously in this report. A summary of the intersection Level of Service is presented in Table 1. Intersection analysis worksheets are provided in *Appendix B* of this report. Review of the table shows that all study intersections currently operate at an acceptable Level of Service during the morning and evening peak hours.



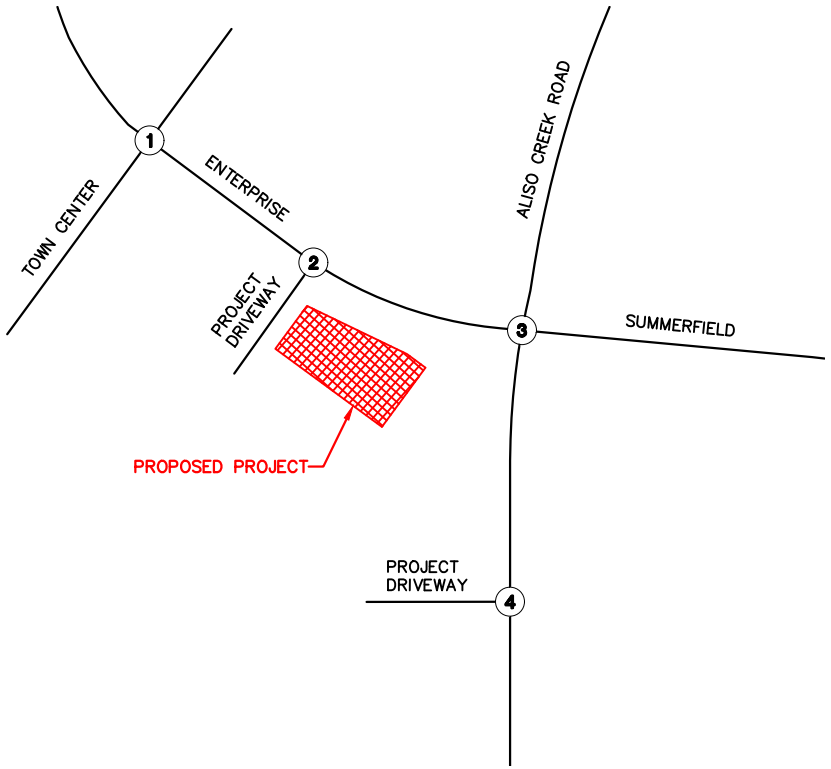
NOT TO SCALE

1. Enterprise at Town Center	2. Enterprise at Project Driveway	3. Aliso Creek Road at Enterprise	4. Aliso Creek Road at Project Driveway
			

LEGEND:

- X = Study Intersection
- = Turn or Through Lane
- = Signal
- = Stop Sign
- D = Defacto Right Turn

FIGURE 3
EXISTING LANE CONFIGURATION AND TRAFFIC CONTROL



NOT TO SCALE

1. Enterprise at Town Center	2. Enterprise at Project Driveway	3. Aliso Creek Road at Enterprise	4. Aliso Creek Road at Project Driveway
26(109) 18(46) 39(129) ← 30(104) ← 165(77) ← 52(93)	← 247(272)	110(149) 838(1085) 41(158) ← 158(87) ← 33(15) ← 136(76)	37(117) 968(1208)
22(78) → 83(117) → 26(72) → 31(70) ↑ 17(57) ↑ 28(49) ↑	140(258) → 7(29) → 2(4) ↑ 37(140) ↑	104(182) → 20(24) → 34(163) → 102(137) ↑ 1080(762) ↑ 79(102) ↑	6(81) → 17(78) ↑ 1261(1001) ↑

LEGEND:

(X) = Study Intersection

XX/YY = AM/PM Peak Hour Volumes

FIGURE 4
EXISTING TRAFFIC VOLUMES

TABLE 1
SUMMARY OF INTERSECTION OPERATION
EXISTING CONDITIONS

ICU Methodology

Int. #	Intersection	Traffic Control	AM Peak Hour		PM Peak Hour	
			ICU	LOS	ICU	LOS
1	Enterprise at Town Center	S	0.16	A	0.24	A
3	Aliso Creek Road at Enterprise	S	0.48	A	0.53	A

HCM Methodology

Int. #	Intersection	Traffic Control	AM Peak Hour		PM Peak Hour	
			Delay	LOS	Delay	LOS
2	Enterprise at Project Driveway (NB Approach)	U	8.9	A	10.1	B
4	Aliso Creek Road at Project Driveway	U	13.6	B	18.8	C
	NB Approach		0.2	A	2.0	A
	EB Approach		13.6	B	18.8	C

Notes:
- Bold values indicate intersections operating at an unacceptable Level of Service
- Intersection operation is expressed in volume-to-capacity (v/c) ratio for signalized intersections, and average delay for unsignalized intersections.
- Delay values for unsignalized intersections represent the average vehicle delay on the worst (highest delay) intersection approach.

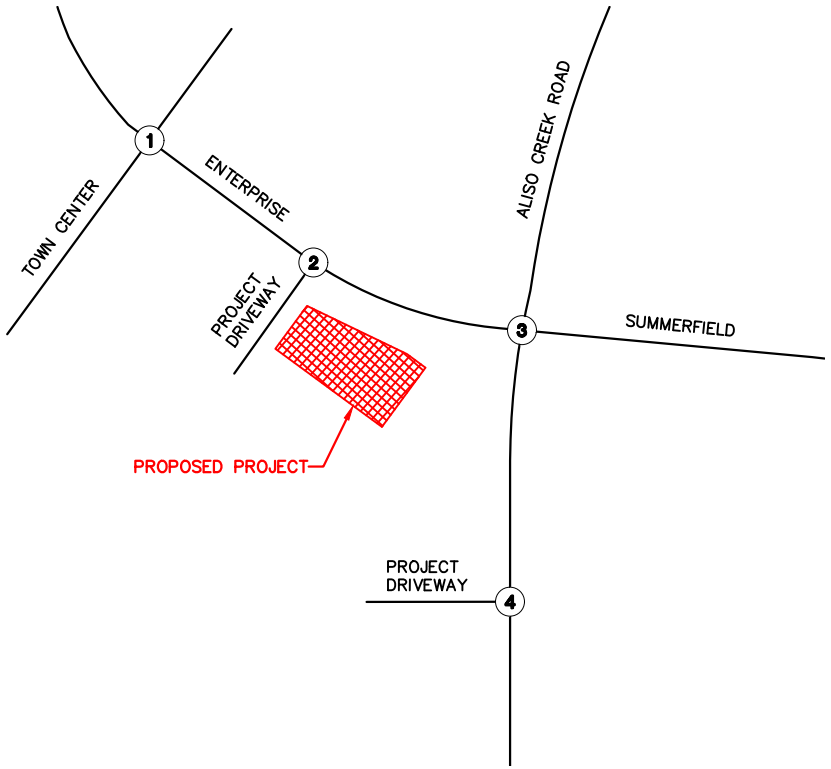
FUTURE CONDITIONS

Project completion is estimated to occur in Year 2022. Future year forecasts for Opening Year 2022 were developed by adding a background growth factor of one percent per year to existing traffic volumes, for a total of one year.

Opening Year 2022 Conditions

The background growth was added to the existing traffic volumes to develop Opening Year 2022 volumes. The resulting traffic volumes are shown on Figure 5.

A summary of the resulting intersection Level of Service is provided on Table 2. Intersection analysis worksheets are provided in *Appendix B*. With the addition of background growth, all study intersections would continue to operate at an acceptable Level of Service.



NOT TO SCALE

1. Enterprise at Town Center	2. Enterprise at Project Driveway	3. Aliso Creek Road at Enterprise	4. Aliso Creek Road at Project Driveway
26(110) 18(46) 39(130) ← 30(105) ← 167(78) ← 53(94)	← 249(275)	111(150) 846(1096) 41(160) ← 160(88) ← 33(15) ← 137(77)	37(118) 978(1220)
22(79) → 84(118) → 26(73) → 31(71) ↑ 17(58) ↑ 28(49) ↑	141(261) → 7(29) → 2(4) ↑ 37(141) ↑	105(184) → 20(24) → 34(165) → 103(138) ↑ 1091(770) ↑ 80(103) ↑	6(82) → 17(79) ↑ 1274(1011) ↑

LEGEND:

(X) = Study Intersection

XX/YY = AM/PM Peak Hour Volumes

FIGURE 5
OPENING YEAR 2022 TRAFFIC VOLUMES

TABLE 2
SUMMARY OF INTERSECTION OPERATION
OPENING YEAR 2022 CONDITIONS

ICU Methodology

Int. #	Intersection	Traffic Control	AM Peak Hour		PM Peak Hour	
			ICU	LOS	ICU	LOS
1	Enterprise at Town Center	S	0.16	A	0.25	A
3	Aliso Creek Road at Enterprise	S	0.48	A	0.53	A

HCM Methodology

Int. #	Intersection	Traffic Control	AM Peak Hour		PM Peak Hour	
			Delay	LOS	Delay	LOS
2	Enterprise at Project Driveway (NB Approach)	U	8.9	A	10.1	B
4	Aliso Creek Road at Project Driveway	U	13.7	B	19.0	C
	NB Approach		0.2	A	2.1	A
	EB Approach		13.7	B	19.0	C

Notes:
- Bold values indicate intersections operating at an unacceptable Level of Service

- Intersection operation is expressed in volume-to-capacity (v/c) ratio for signalized intersections, and average delay for unsignalized intersections.

- Delay values for unsignalized intersections represent the average vehicle delay on the worst (highest delay) intersection approach.

PROJECT TRAFFIC

Project Trip Generation

Peak hour trips for the proposed project were determined based on data provided by the Institute of Transportation Engineers (ITE) Trip Generation Manual, 11th Edition. Trip generation rates for the Fast-Food Restaurant w/ Drive-thru (Land Use 934) were used in determining project trips.

It is recognized that not all inbound and outbound trips to the proposed project will be "new" trips on the roadway system in the vicinity of the proposed project. Some trips to the project site will consist of "pass-by" trips -- motorists who are already traveling on the surrounding roadways from one place to another. Common pass-by trips for retail uses would be individuals who stop at the project site on the way to work or school. Pass-by percentages were applied to the proposed land use as follows:

- Fast-Food Restaurant w/ Drive-thru: 49% AM, 50% PM

Morning and evening peak hour trip generation estimates are summarized on Table 3. The project is estimated to generate 204 morning peak hour trips and 150 evening peak hour trips. After applying pass-by reductions, the development is projected to generate a net of 104 morning peak hour trips and 75 evening peak hour trips.

Project Trip Distribution and Assignment

Project trip distribution and assignment assumptions for the proposed project were developed based on likely origins and destinations of drivers. Assumptions were reviewed and approved by City Traffic Engineering staff. Trip distribution assumptions are shown on Figure 6.

Based on the proposed project trip distribution, project trips were assigned through the study intersections. Figure 7 shows new project trips that would be added to the study intersections.

TABLE 3
SUMMARY OF PROJECT TRIP GENERATION
AMY'S DRIVE THRU - ALISO VIEJO

Land Use	ITE Code	Unit	Trip Generation Rates [1]						
			Daily	AM Peak Hour			PM Peak Hour		
				In	Out	Total	In	Out	Total
Fast-Food Restaurant w/ Drive-thru	934	KSF	467.48	22.751	21.859	44.61	17.176	15.854	33.03

Land Use	Quantity	Unit	Trip Generation Estimates						
			Daily	AM Peak Hour			PM Peak Hour		
				In	Out	Total	In	Out	Total
Fast-Food Restaurant w/ Drive-thru	4.558	KSF	2,131	104	100	204	78	72	150
Pass-by Trips (49% AM, 50% PM) [2]			*-175*	*-51*	*-49*	*-100*	*-39*	*-36*	*-75*
Net Trips			*1,956*	*53*	*51*	*104*	*39*	*36*	*75*
Total Project Trips			1,956	53	51	104	39	36	75

[1] Source: Institute of Transportation Engineers (ITE) Trip Generation Manual, 11th Edition

[2] Source: Institute of Transportation Engineers (ITE) Trip Generation Manual - Volume 1: User's Guide and Handbook, 9th Edition

[3] Note: The User's Guide and Handbook does not provide pass-by rates for daily trip generation. The daily pass-by trips shown are the sum of the AM and the PM pass-by trips.

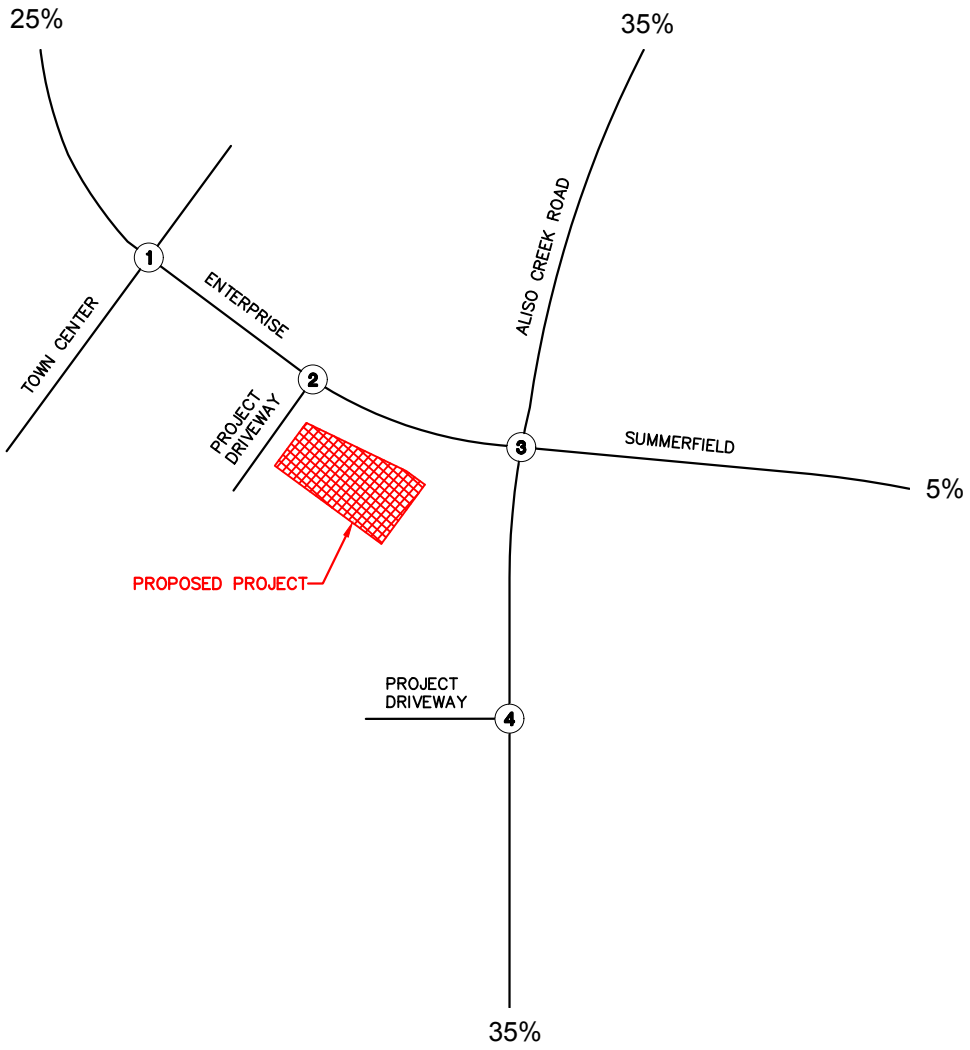
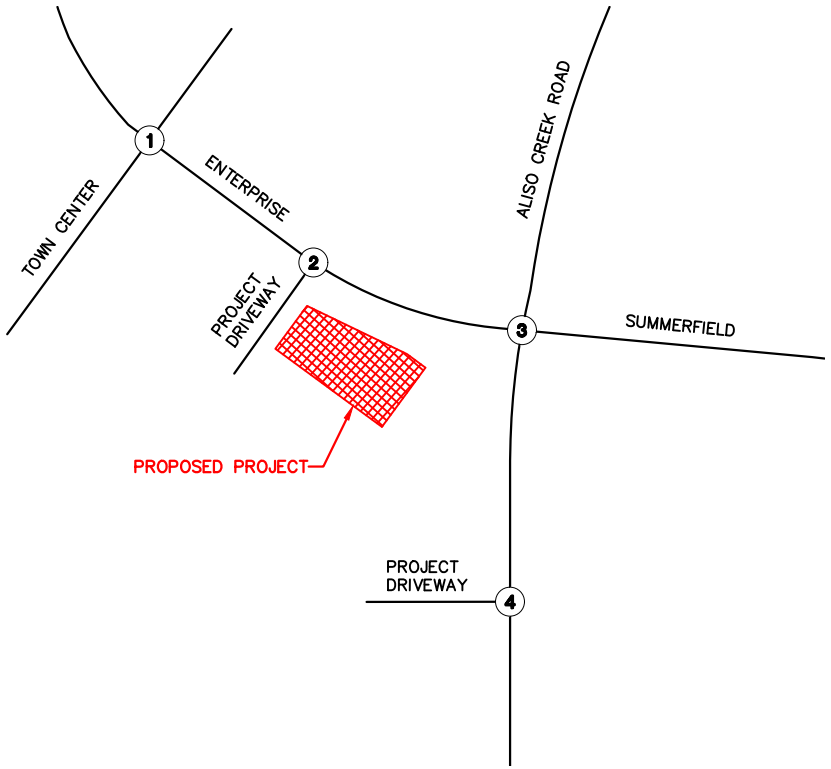


FIGURE 6
TRIP DISTRIBUTION ASSUMPTIONS
SOURCE: NEARMAP



1. Enterprise at Town Center	2. Enterprise at Project Driveway	3. Aliso Creek Road at Enterprise	4. Aliso Creek Road at Project Driveway
26(20) → ↱ 25(18)	−13(−10) → 26(20) ↴ ↱ 40(29)	← 36(27) ↰ 5(4) 22(15) ↱ 5(4) → ↑ −18(−14)	← 42(31) ← 21(−15) 35(25) ↴ ↑ 36(27) ↑ −18(−14)

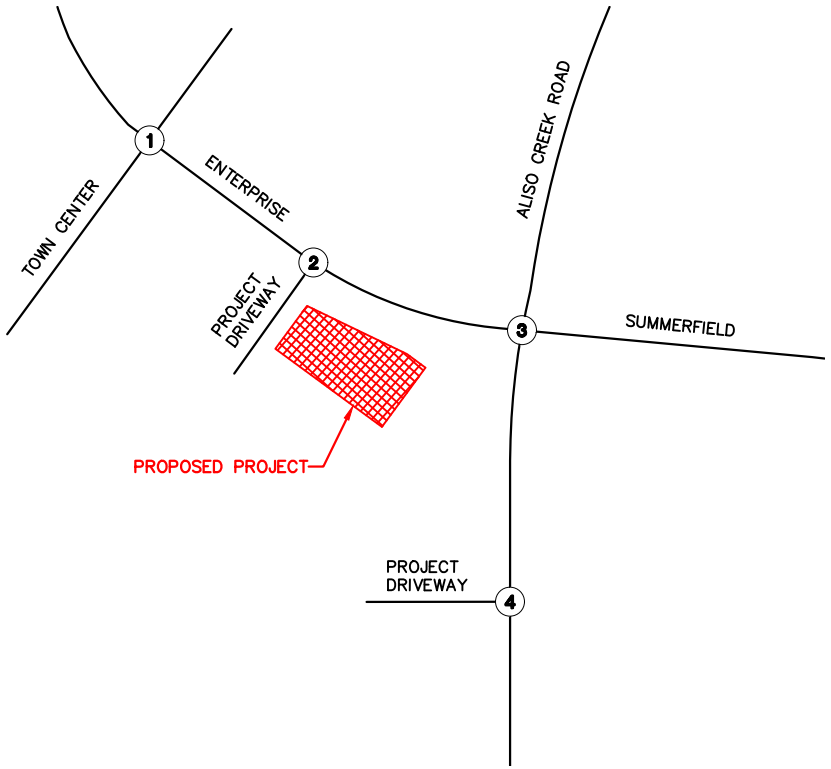
FIGURE 7
PROJECT TRAFFIC VOLUMES

LEGEND:
(X) = Study Intersection
XX/YY = AM/PM Peak Hour Volumes

Opening Year 2022 Plus Project

Project-related traffic was added to Opening Year 2022 Without Project volumes to develop Opening Year 2022 Plus Project traffic forecasts. The resulting traffic volumes are shown on Figure 8.

A summary of the resulting intersection Level of Service is provided on Table 4. Intersection analysis worksheets are provided in *Appendix B*. With the addition of project traffic, all study intersections would continue to operate at an acceptable Level of Service in the morning and evening peak hours.



NOT TO SCALE

1. Enterprise at Town Center	2. Enterprise at Project Driveway	3. Aliso Creek Road at Enterprise	4. Aliso Creek Road at Project Driveway
26(110) ↙ 18(46) ↓ 39(130) ↘ | 30(105) ↖ ← 167(78) ← 53(94) ↖ 22(79) → ↘ 110(138) → ↘ 26(73) ↘ | 56(89) ↑ ↗ 17(58) ↑ ↗ 28(49) ↑ ↗	← 249(275) 128(251) → ↘ 33(49) ↘ | 2(4) ↑ ↗ 77(170) ↗	111(150) ↙ 882(1123) ← 41(160) ↙ | 160(88) ↖ ← 33(15) ← 142(81) ↖ 127(199) → ↘ 25(28) → ↘ 34(165) ↘ | 103(138) ↑ ↗ 1073(756) ↑ ↗ 80(103) ↑ ↗	79(149) ↙ ← 957(1205) 41(107) ↘ | 53(106) ↑ ↗ 1256(997) ↑ ↗

LEGEND:

(X) = Study Intersection

XX/YY = AM/PM Peak Hour Volumes

FIGURE 8
OPENING YEAR 2022 PLUS PROJECT
TRAFFIC VOLUMES

TABLE 4
SUMMARY OF INTERSECTION OPERATION
OPENING YEAR 2022 WITH PROJECT CONDITIONS

ICU Methodology

Int. #	Intersection	AM Peak Hour						PM Peak Hour					
		Without Project		With Project		Change in V/C	Sig Project Effect?	Without Project		With Project		Change in V/C	Sig Project Effect?
		ICU	LOS	ICU	LOS			ICU	LOS	ICU	LOS		
1	Enterprise at Town Center	0.16	A	0.17	A	0.01	No	0.25	A	0.26	A	0.01	No
3	Aliso Creek Road at Enterprise	0.48	A	0.49	A	0.01	No	0.53	A	0.54	A	0.01	No

HCM Methodology

Int. #	Intersection	AM Peak Hour						PM Peak Hour					
		Without Project		With Project		Change in Delay	Sig Project Effect?	Without Project		With Project		Change in Delay	Sig Project Effect?
		Delay	LOS	Delay	LOS			Delay	LOS	Delay	LOS		
2	Enterprise at Project Driveway (NB Approach)	8.9	A	9.1	A	0.2	No	10.1	B	10.4	B	0.3	No
4	Aliso Creek Road at Project Driveway	13.7	B	14.4	B	0.7	No	19.0	C	20.3	C	1.3	No
	NB Approach	0.2	A	0.7	A	0.5	No	2.1	A	3.4	A	1.3	No
	EB Approach	13.7	B	14.4	B	0.7	No	19.0	C	20.3	C	1.3	No

Notes:
- Bold values indicate intersections operating at an unacceptable Level of Service
- Intersection operation is expressed in volume-to-capacity (v/c) ratio for signalized intersections, and average delay for unsignalized intersections.
- Delay values for unsignalized intersections represent the average vehicle delay on the worst (highest delay) intersection approach.

SITE ACCESS AND CIRCULATION

Access to the proposed development would be provided via the signalized intersection at Enterprise and Town Center, one right-in right-out (RIRO) driveway on eastbound Enterprise, and one unrestricted in, right-out driveway on Aliso Creek Road. Both intersections are unsignalized and provide access to other retail and shopping center land uses in the vicinity of the project.

The proposed drive-thru lanes will be located on the west side of the restaurant building. The drive-thru will begin at the southwest corner of the proposed parking area, wrapping around the northwest and northeast corners of the parking area, and continuing south, parallel to the restaurant, as previously shown in Figure 2. The proposed drive-thru would have two divided entry lanes, which merge into a single lane prior to the order board, approximately 100 feet from the drive-thru entrance. One order board is proposed approximately 150 feet from the drive-thru entrance, and one pick-up/pay window is proposed 256 feet from the drive-thru entrance. Two additional pull-ahead spots are provided south of the order/pay window for vehicles to pull over and wait for their order to be completed, if necessary. The proposed drive-thru can accommodate 16 queued vehicles, not including the additional 2 pull-ahead spots. A total of 32 parking spaces are provided for the proposed Amy's Drive Thru.

DRIVE-THRU QUEUEING ANALYSIS

For the drive-thru queueing, we reviewed an existing Amy's Drive Thru restaurant in the City of Rohnert Park in Northern California. The characteristics of that restaurant location are similar to what is proposed in Aliso Viejo and drive-thru operations are anticipated to be similar. Drive-thru queuing observations were analyzed for that location in the *Traffic Impact Study on Amy's Drive Thru Restaurant* (August 2019), prepared by TJKM.

The study reports that the maximum queue observed on a given weekday was 12 vehicles and during the weekend the maximum queue experienced was 18 vehicles.

Per the site plan shown in Figure 2, the following observations were made regarding drive-thru geometry and layout:

- The proposed project's drive-thru lane would have enough stacking distance for 16 vehicles up to and including the vehicle at the service window, and 18 total including the two pull-ahead spots after the pick-up window.
- Stacking distance of 256' is provided from the drive-thru entrance to the first window.

Drive-Thru Queue Length Calculation

To supplement the empirical data provided in TJKM's Traffic Impact Study on *Amy's Drive Thru Restaurant* (August 2019) the drive-thru queuing capacity was also analyzed using queuing analysis formulas published in the Institute of Transportation Engineers (ITE) Transportation Planning Handbook, 3rd Edition.

Based on data provided by Amy's Drive Thru, their restaurants are experiencing a 60-40 split with 60% of patrons utilizing the drive-thru and 40% entering the restaurant. Applying this percentage to the largest volume of peak hour trips into the project (104) yields an average arrival of 63 vehicles/hour. Typical drive-thru service times for a patron consist on average of 45 seconds at the order board, and 45 seconds once the vehicle pulls up to the window to pay and receive food. The total time a patron spends from order board to receiving food ranges from 4 - 6 minutes. If a patron is anticipated to be at the pick-up window for more than 45 seconds, they are asked to move up to the pull-ahead spaces. For our calculations, we have conservatively used the 6-minutes service rate for the drive-thru operations analysis. Using the arrival rate with the service rates and applying the ITE queuing formulas, the analysis indicates that the average queue length is estimated to be approximately 6 vehicles, and the probability that the queue would be exactly 18 vehicles would be 0.97%. The occurrence of exceeding 18 vehicles is estimated to be a low probability of 6.09%. Therefore, approximately 94% of the time, the vehicle queues will be contained within the proposed drive-thru storage provided. The queuing calculation worksheet and formulas are provided as *Appendix C* of this report.

The occurrence of the drive-thru queue extending beyond the opening of the drive-thru lane is expected to be a very infrequent occurrence, and of minimum duration.

VEHICLE MILES TRAVELED (VMT) SCREENING

With the passage of Senate Bill (SB) 743 by the California Legislature in September 2013, VMT has become an important indicator for determining if a new development will result in a "significant transportation impact" as required by the California Environmental Quality Act (CEQA). Under SB 743, the state Office of Planning and Research (OPR) was charged with developing new guidelines for evaluating transportation impacts under CEQA in order to replace methods measuring automobile delay and Level of Service. In response to this mandate, the Office of Planning and Research proposed, and the California Natural Resources Agency adopted CEQA Guidelines Section 15064.3, which indicates that VMT exceeding an applicable threshold of significance is the most appropriate measure for evaluating a project's transportation impacts. Section 15064.3 goes on to clarify that except for projects regarding roadway capacity, "…a project's effect on automobile delay does not constitute a significant environmental impact." The OPR further elaborates on VMT metrics within the Technical Advisory on Evaluating Transportation Impacts in CEQA document, published in December 2018.

The Technical Advisory establishes that, for commercial uses, impact should be established based on the net increase in VMT. However, the document further establishes that local-serving commercial uses can be determined to result in an overall VMT reduction.

Local-serving commercial uses, particularly in urban areas, primarily serve pre-existing needs and do not generate new trips because there are existing demands. As a result, local-serving commercial uses less than 50,000 square feet can be presumed to reduce trip lengths when a new site is proposed and would therefore have a less-than-significant impact. For instance, a customer may travel to the new development because of a closer proximity compared to other gas stations or car washes in the area and is therefore not a new trip. These customers will access the proposed site because it is closer to their origin, or because the site is more convenient than similar sites in the vicinity. This results in an existing trip on the roadway network becoming shorter, rather than a new trip being added to the roadway network. In accordance with the Technical Advisory, it is appropriate that the proposed Amy's Drive Thru Restaurant project be presumed to result in a less-than-significant VMT impact and support the goals of SB 743. No further VMT assessment is anticipated.

SUMMARY OF FINDINGS AND CONCLUSIONS

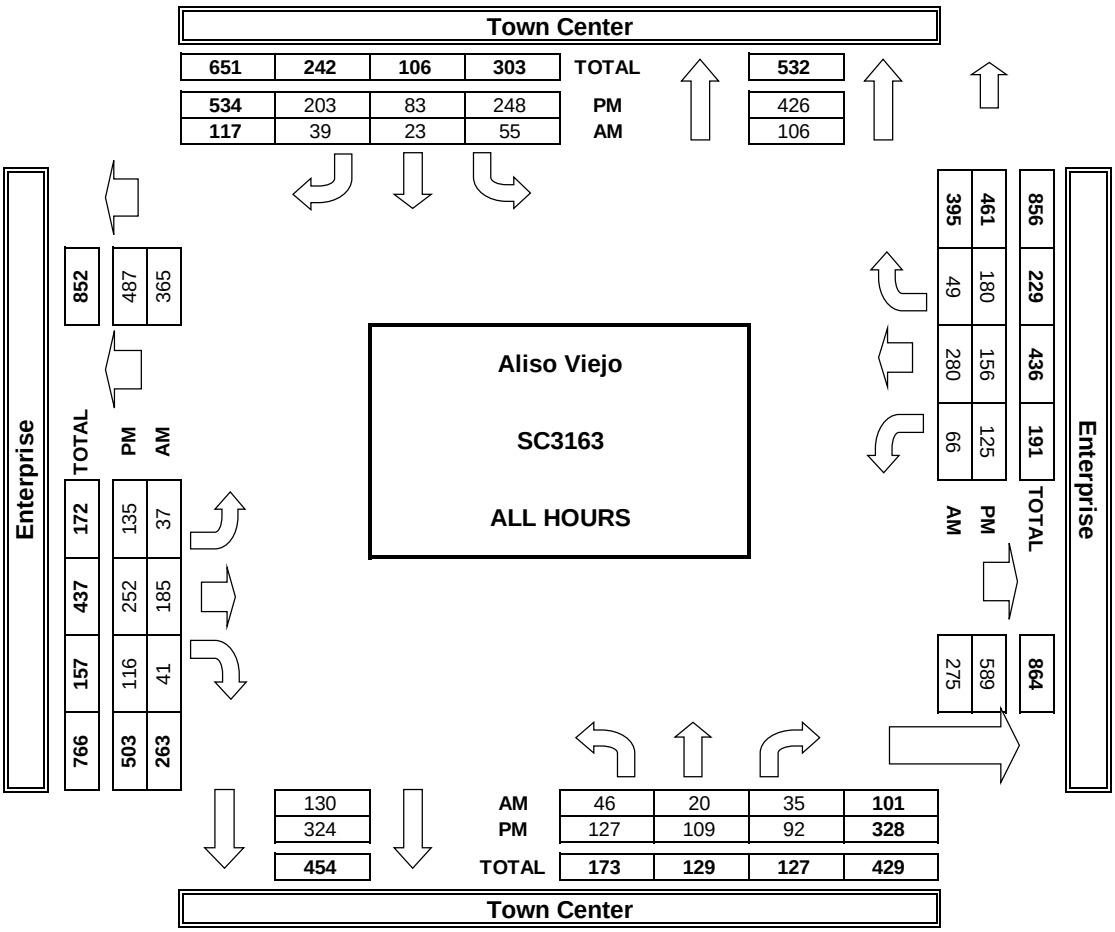
- The applicant proposes to demolish the existing Macaroni Grill restaurant and develop a 4,558-square-foot fast food restaurant with drive-thru.
- The project proposes two driveways: one right in, right out (RIRO) driveway on Enterprise, and one full movement in, right out driveway on Aliso Creek Road. Both project driveways would be unsignalized.
- Morning and evening peak hour operating conditions were evaluated at four study intersections (all existing) for the following study scenarios:
    - Existing Conditions
    - Opening Year 2022
    - Opening Year 2022 Plus Project
- Under Existing Conditions, all study intersections are currently operating at an acceptable Level of Service.
- The project is estimated to generate 204 morning peak hour trips and 150 evening peak hour trips. After applying pass-by reductions, the development is projected to generate a net addition of 104 morning peak hour trips and 75 evening peak hour trips.
- Under Opening Year 2022 Conditions, all study intersections would continue to operate at an acceptable Level of Service.
- Under Opening Year 2022 Plus Project Conditions, all study intersections would continue to operate at an acceptable Level of Service.
- Maximum drive-thru queues for the existing Amy's Drive Thru restaurant in the City of Rohnert Park in Northern California was 12 vehicles on a given weekday and 18 vehicles on a weekend-based drive-thru queuing observations analyzed for that location in the *Traffic Impact Study on Amy's Drive Thru Restaurant* (August 2019), prepared by TJKM. The Rohnert Park location has similar characteristics for location and operation that is anticipated for the Aliso Viejo location.
- Assuming a 60/40 split of drive-thru patrons to in-restaurant patrons and an average hourly arrival of 63 vehicles, average queue length is estimated to be approximately 6 vehicles. The occurrence of exceeding the proposed storage capacity of 18 vehicles is 6.09%. Therefore, approximately 94% of the time, the vehicle queues will be contained within the proposed drive-thru storage provided.
- The total time a patron spends from the order board to receiving their food at the pickup window is 4 to 6 minutes. On average, 45 seconds are spent at the order board, and 45 seconds are spent at the pick-up window. Conservatively, we utilized 6 minutes for the service rate for the drive-thru queueing analysis.
- As the proposed project can be classified as local-serving commercial and is less than 50,000 square feet, a less-than-significant VMT impact is assumed. No further VMT assessment is anticipated.

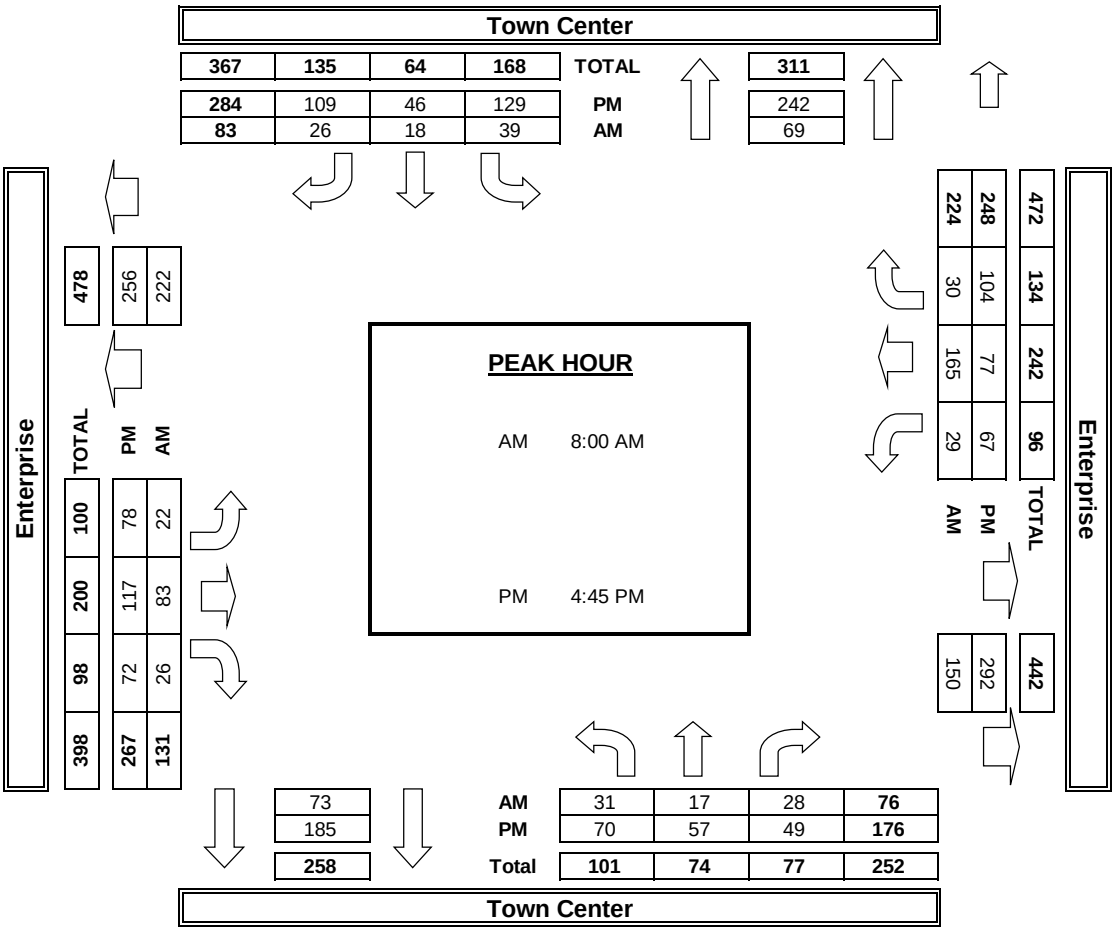
APPENDIX **A**

TRAFFIC COUNT WORKSHEETS

AimTD LLC

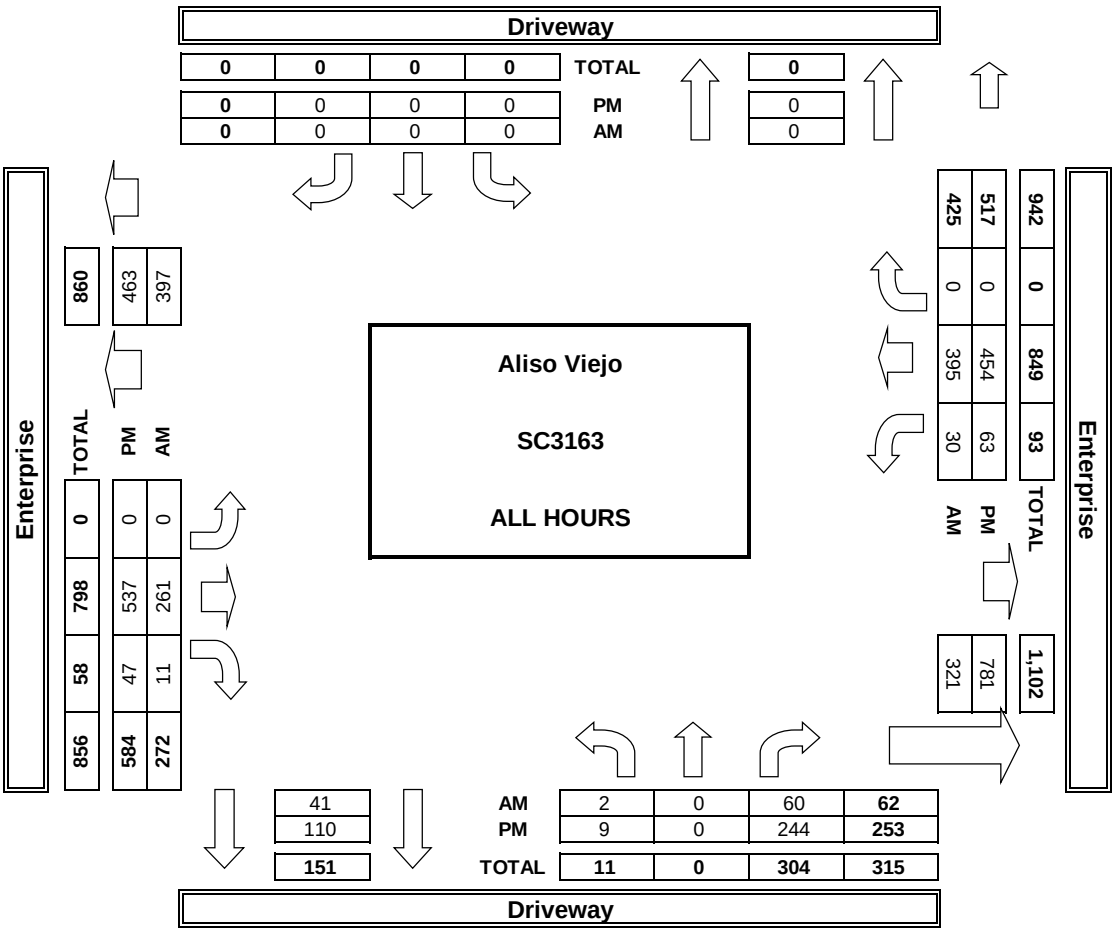
TURNING MOVEMENT COUNTS

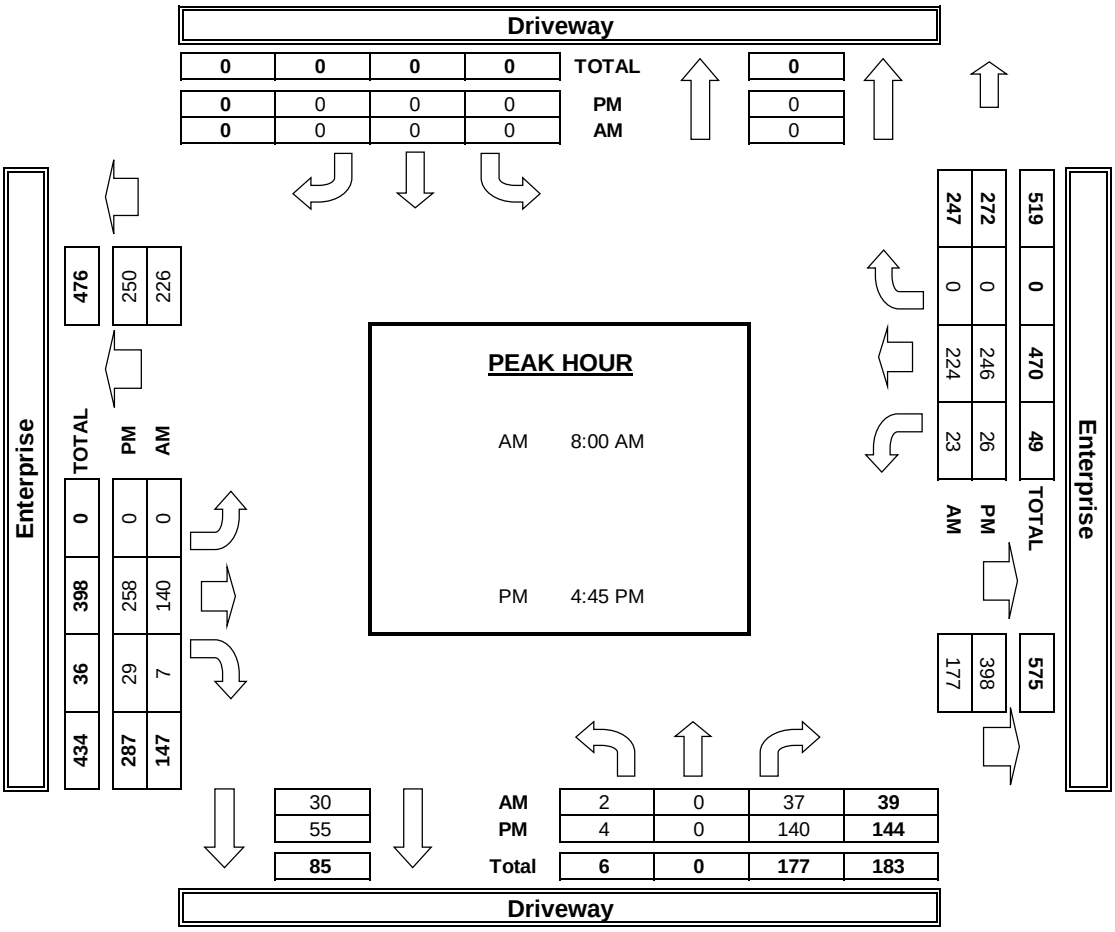




AimTD LLC

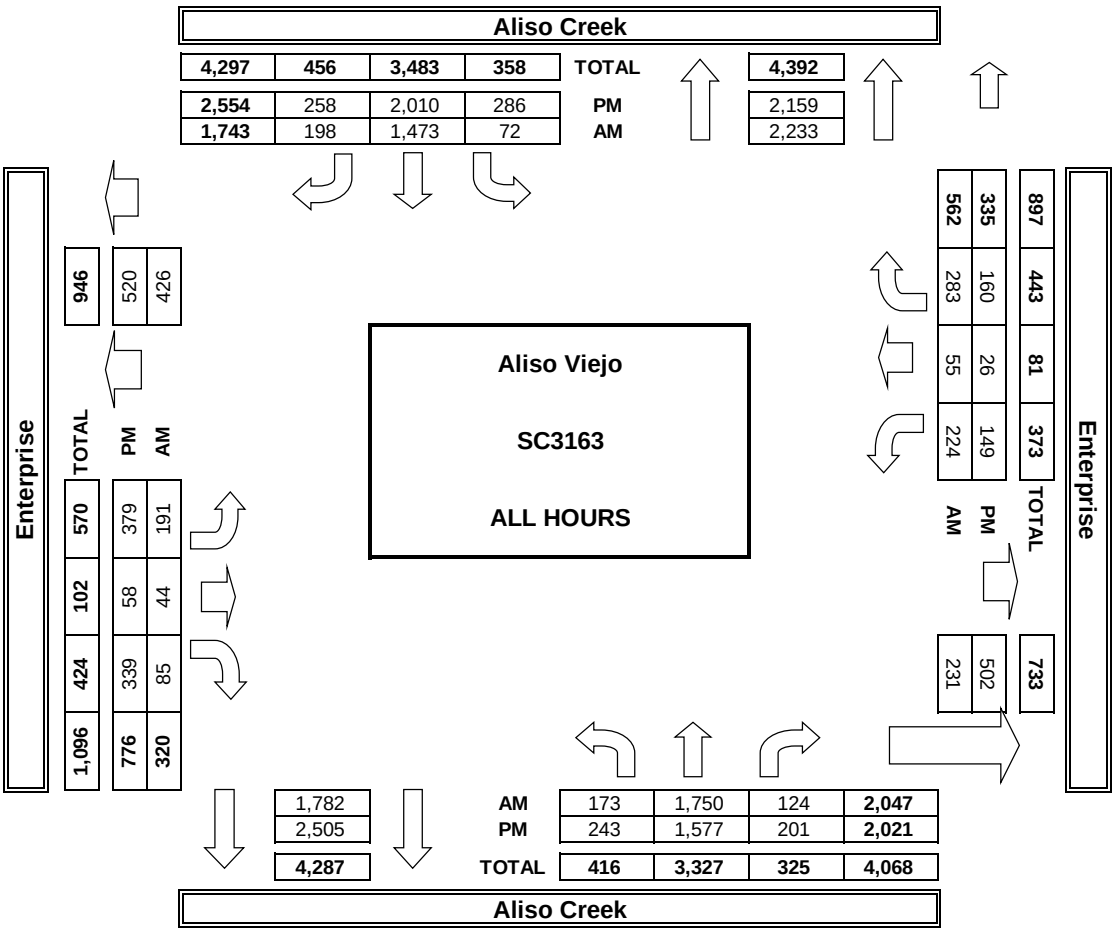
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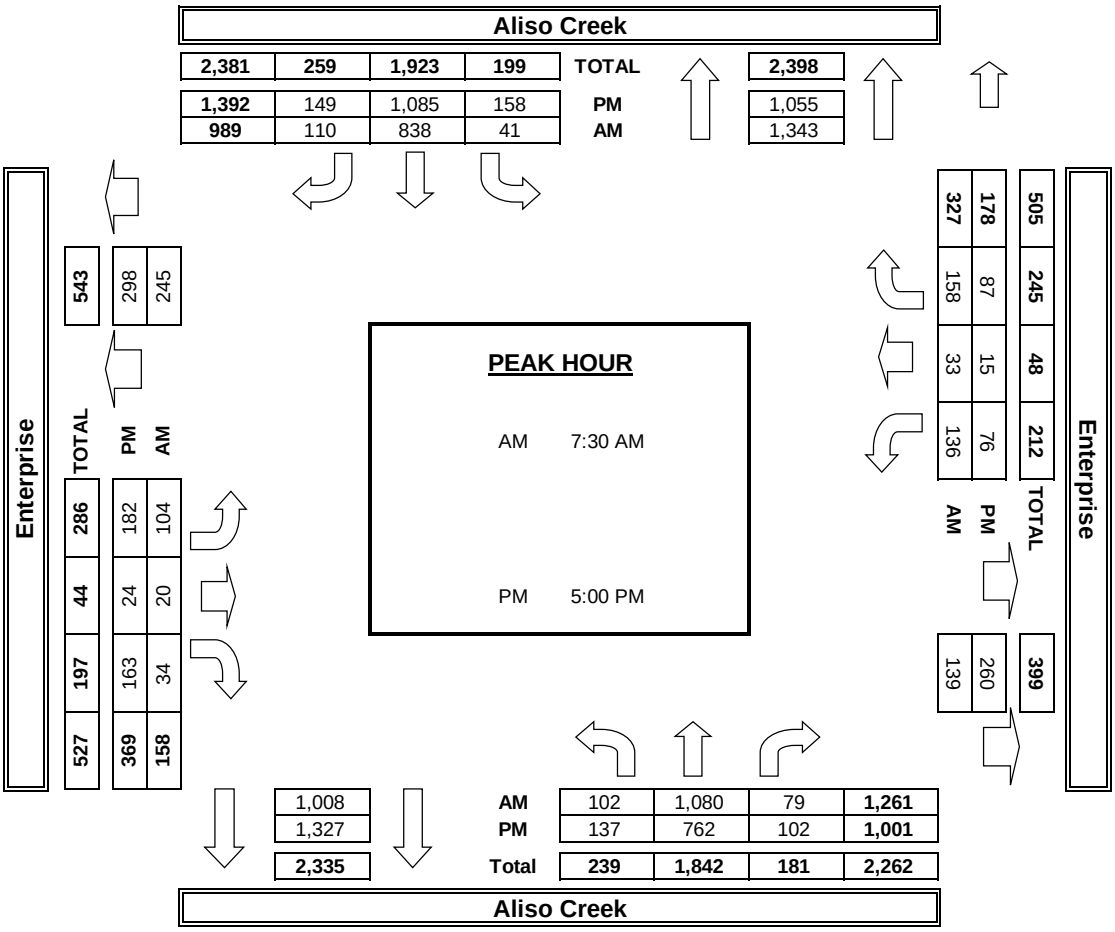




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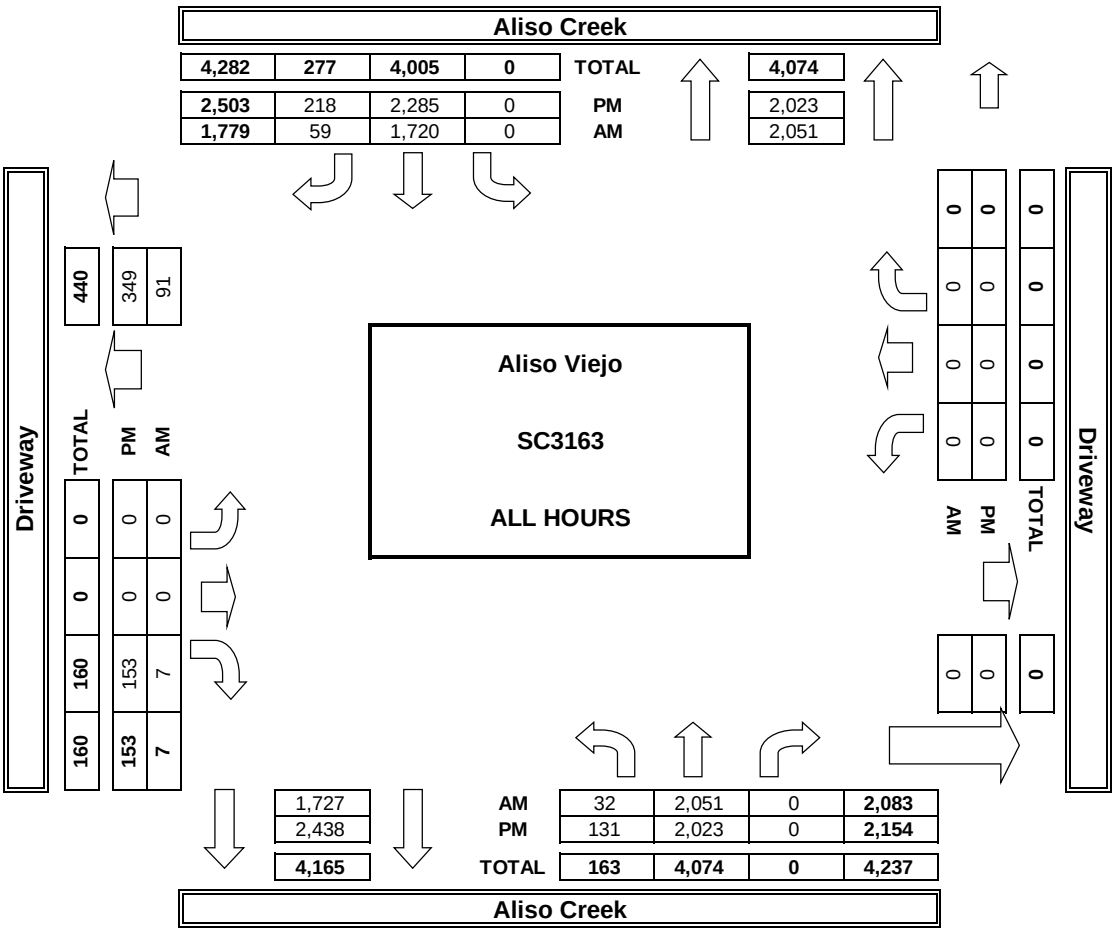
TURNING MOVEMENT COUNTS

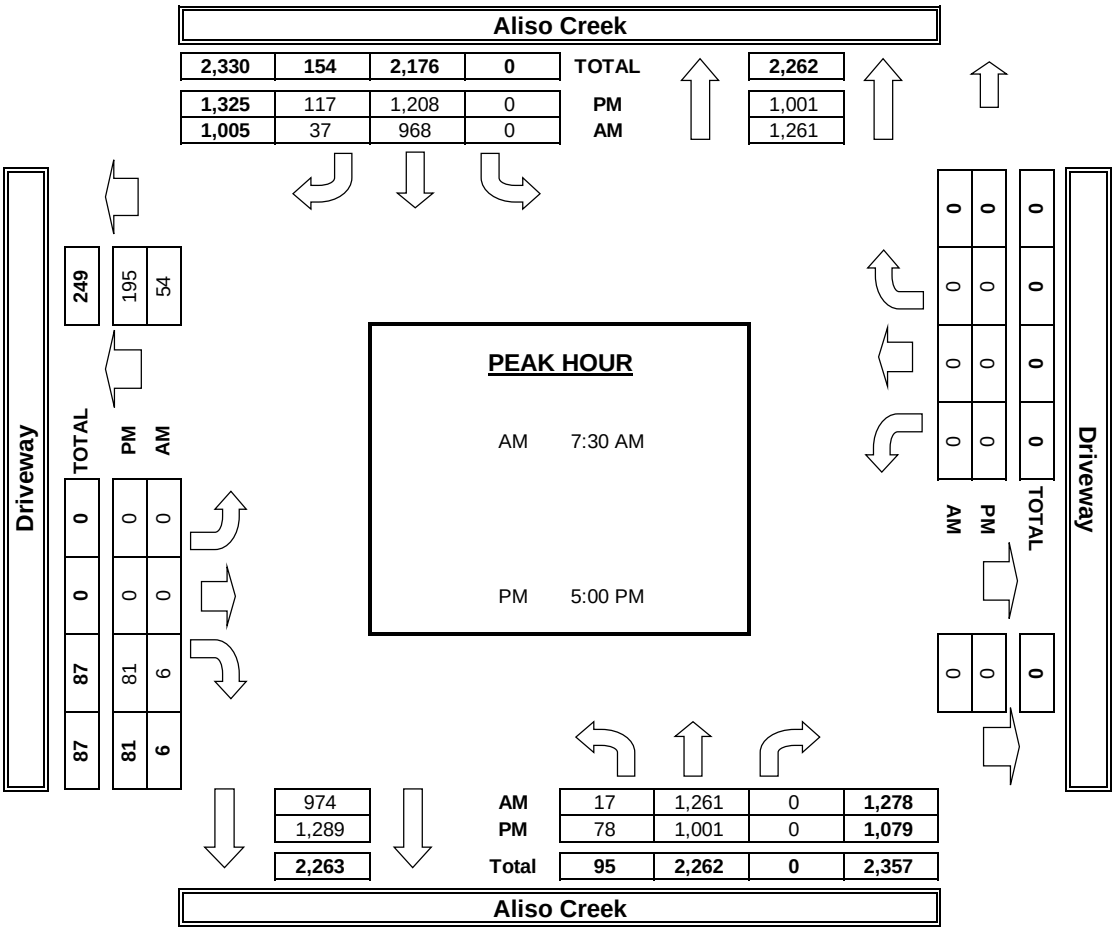




AimTD LLC

TURNING MOVEMENT COUNTS





APPENDIX **B**

INTERSECTION ANALYSIS WORKSHEETS

Existing

	LANES	CAPACITY	AM PEAK HOUR VOL	AM PEAK HOUR V/C	PM PEAK HOUR VOL	PM PEAK HOUR V/C
NBL	1	1700	31	0.02 *	70	0.04 *
NBT	2	3200	17	0.01	57	0.02
NBR	1	1700	28	0.02	49	0.03
SBL	1	3200	39	0.01	129	0.04
SBT	1	1600	18	0.01	46	0.03
SBR	1	1700	26	0.02 *	109	0.06 *
EBL	1	1700	22	0.01	78	0.05
EBT	2	3200	83	0.03	117	0.04 *
EBR	1	1700	26	0.02	72	0.04
WBL	1	1700	52	0.03	93	0.05 *
WBT	2	3200	165	0.05	77	0.02
WBR	1	1700	30	0.02	104	0.06
Right Turn Adjustment				0.02		0.01
Clearance Interval				0.05		0.05
TOTAL CAPACITY UTILIZATION				0.16		0.24

Opening Year 2022

	LANES	CAPACITY	AM PEAK HOUR VOL	AM PEAK HOUR V/C	PM PEAK HOUR VOL	PM PEAK HOUR V/C
NBL	1	1700	31	0.02 *	71	0.04 *
NBT	2	3200	17	0.01	58	0.02
NBR	1	1700	28	0.02	49	0.03
SBL	1	3200	39	0.01	130	0.04
SBT	1	1600	18	0.01	46	0.03
SBR	1	1700	26	0.02 *	110	0.06 *
EBL	1	1700	22	0.01	79	0.05
EBT	2	3200	84	0.03	118	0.04 *
EBR	1	1700	26	0.02	73	0.04
WBL	1	1700	53	0.03	94	0.06 *
WBT	2	3200	167	0.05	78	0.02
WBR	1	1700	30	0.02	105	0.06
Right Turn Adjustment				0.02		0.00
Clearance Interval				0.05		0.05
TOTAL CAPACITY UTILIZATION				0.16		0.25

Opening Year 2022 Plus Project

	LANES	CAPACITY	AM PEAK HOUR VOL	AM PEAK HOUR V/C	PM PEAK HOUR VOL	PM PEAK HOUR V/C
NBL	1	1700	56	0.03 *	89	0.05 *
NBT	2	3200	17	0.01	58	0.02
NBR	1	1700	28	0.02	49	0.03
SBL	1	3200	39	0.01	130	0.04
SBT	1	1600	18	0.01	46	0.03
SBR	1	1700	26	0.02 *	110	0.06 *
EBL	1	1700	22	0.01	79	0.05
EBT	2	3200	110	0.03	138	0.04 *
EBR	1	1700	26	0.02	73	0.04
WBL	1	1700	53	0.03	94	0.06 *
WBT	2	3200	167	0.05	78	0.02
WBR	1	1700	30	0.02	105	0.06
Right Turn Adjustment				0.03		0.01
Clearance Interval				0.05		0.05
TOTAL CAPACITY UTILIZATION				0.17		0.26

Existing

	LANES	CAPACITY	AM PEAK HOUR VOL	V/C		PM PEAK HOUR VOL	V/C	
NBL	1	1700	102	0.06		137	0.08	*
NBT	3	4800	1080	0.24	*	762	0.18	
NBR	0	0	79			102		
SBL	1	3200	41	0.01	*	158	0.05	
SBT	3	4800	838	0.17		1085	0.23	*
SBR	1	1700	110	0.06		149	0.09	
EBL	1	1700	104	0.06	*	182	0.11	*
EBT	2	3200	20	0.01		24	0.01	
EBR	1	1700	34	0.02		163	0.10	
WBL	1	1700	136	0.08		76	0.04	
WBT	1	1600	33	0.12	*	15	0.06	*
WBR	0	1700	158			87		
Right Turn Adjustment				0.00			0.00	
Clearance Interval				0.05			0.05	
TOTAL CAPACITY UTILIZATION				0.48			0.53	
NRT		0	0.00	0.00		0.00	0.00	
SRT			-0.16	0.00		-0.20	0.00	
ERT			-0.12	0.00		-0.07	0.00	
WRT		0	0.00	0.00		0.00	0.00	
				0.00			0.00	

Opening Year 2022

	LANES	CAPACITY	AM PEAK HOUR VOL	V/C		PM PEAK HOUR VOL	V/C	
NBL	1	1700	103	0.06		138	0.08	*
NBT	3	4800	1091	0.24	*	770	0.18	
NBR	0	0	80			103		
SBL	1	3200	41	0.01	*	160	0.05	
SBT	3	4800	846	0.18		1096	0.23	*
SBR	1	1700	111	0.07		150	0.09	
EBL	1	1700	105	0.06	*	184	0.11	*
EBT	2	3200	20	0.01		24	0.01	
EBR	1	1700	34	0.02		165	0.10	
WBL	1	1700	137	0.08		77	0.05	
WBT	1	1600	33	0.12	*	15	0.06	*
WBR	0	1700	160			88		
Right Turn Adjustment				0.00			0.00	
Clearance Interval				0.05			0.05	
TOTAL CAPACITY UTILIZATION				0.48			0.53	
NRT		0	0.00	0.00		0.00	0.00	
SRT			-0.15	0.00		-0.20	0.00	
ERT			-0.12	0.00		-0.06	0.00	
WRT		0	0.00	0.00		0.00	0.00	
				0.00			0.00	

Opening Year 2022 Plus Project

	LANES	CAPACITY	AM PEAK HOUR VOL	V/C		PM PEAK HOUR VOL	V/C	
NBL	1	1700	103	0.06		138	0.08	*
NBT	3	4800	1,073	0.24	*	756	0.18	
NBR	0	0	80			103		
SBL	1	3200	41	0.01	*	160	0.05	
SBT	3	4800	882	0.18		1123	0.23	*
SBR	1	1700	111	0.07		150	0.09	
EBL	1	1700	127	0.07	*	199	0.12	*
EBT	2	3200	25	0.01		28	0.01	
EBR	1	1700	34	0.02		165	0.10	
WBL	1	1700	142	0.08		81	0.05	
WBT	1	1600	33	0.12	*	15	0.06	*
WBR	0	1700	160			88		
Right Turn Adjustment				0.00			0.00	
Clearance Interval				0.05			0.05	
TOTAL CAPACITY UTILIZATION				0.49			0.54	

Intersection	
Int Delay, s/veh	0.8

Movement	EBT	EBR	WBL	WBT	NBL	NBR
Lane Configurations						
Traffic Vol, veh/h	140	7	0	247	2	37
Future Vol, veh/h	140	7	0	247	2	37
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Free	Free	Free	Free	Stop	Stop
RT Channelized	-	None	-	None	-	None
Storage Length	-	-	-	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	152	8	0	268	2	40

Major/Minor	Major1		Major2		Minor1	
Conflicting Flow All	0	0	-	-	290	80
Stage 1	-	-	-	-	156	-
Stage 2	-	-	-	-	134	-
Critical Hdwy	-	-	-	-	6.84	6.94
Critical Hdwy Stg 1	-	-	-	-	5.84	-
Critical Hdwy Stg 2	-	-	-	-	5.84	-
Follow-up Hdwy	-	-	-	-	3.52	3.32
Pot Cap-1 Maneuver	-	-	0	-	677	964
Stage 1	-	-	0	-	856	-
Stage 2	-	-	0	-	878	-
Platoon blocked, %	-	-		-		
Mov Cap-1 Maneuver	-	-	-	-	677	964
Mov Cap-2 Maneuver	-	-	-	-	677	-
Stage 1	-	-	-	-	856	-
Stage 2	-	-	-	-	878	-

Approach	EB	WB	NB
HCM Control Delay, s	0	0	8.9
HCM LOS			A

Minor Lane/Major Mvmt	NBLn1	EBT	EBR	WBT
Capacity (veh/h)	964	-	-	-
HCM Lane V/C Ratio	0.042	-	-	-
HCM Control Delay (s)	8.9	-	-	-
HCM Lane LOS	A	-	-	-
HCM 95th %tile Q(veh)	0.1	-	-	-

Intersection	
Int Delay, s/veh	0.1

Movement	EBL	EBR	NBL	NBT	SBT	SBR
Lane Configurations						
Traffic Vol, veh/h	0	6	17	1261	968	37
Future Vol, veh/h	0	6	17	1261	968	37
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Stop	Stop	Free	Free	Free	Free
RT Channelized	-	None	-	None	-	None
Storage Length	-	0	0	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	0	7	18	1371	1052	40

Major/Minor	Minor2		Major1		Major2	
Conflicting Flow All	-	526	1092	0	-	0
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-
Critical Hdwy	-	7.14	5.34	-	-	-
Critical Hdwy Stg 1	-	-	-	-	-	-
Critical Hdwy Stg 2	-	-	-	-	-	-
Follow-up Hdwy	-	3.92	3.12	-	-	-
Pot Cap-1 Maneuver	0	425	353	-	-	-
Stage 1	0	-	-	-	-	-
Stage 2	0	-	-	-	-	-
Platoon blocked, %				-	-	-
Mov Cap-1 Maneuver	-	425	353	-	-	-
Mov Cap-2 Maneuver	-	-	-	-	-	-
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-

Approach	EB	NB	SB
HCM Control Delay, s	13.6	0.2	0
HCM LOS	B		

Minor Lane/Major Mvmt	NBL	NBT	EBLn1	SBT	SBR
Capacity (veh/h)	353	-	425	-	-
HCM Lane V/C Ratio	0.052	-	0.015	-	-
HCM Control Delay (s)	15.8	-	13.6	-	-
HCM Lane LOS	C	-	B	-	-
HCM 95th %tile Q(veh)	0.2	-	0	-	-

Intersection	
Int Delay, s/veh	2.1

Movement	EBT	EBR	WBL	WBT	NBL	NBR
Lane Configurations						
Traffic Vol, veh/h	258	29	0	272	4	140
Future Vol, veh/h	258	29	0	272	4	140
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Free	Free	Free	Free	Stop	Stop
RT Channelized	-	None	-	None	-	None
Storage Length	-	-	-	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	280	32	0	296	4	152

Major/Minor	Major1		Major2		Minor1	
Conflicting Flow All	0	0	-	-	444	156
Stage 1	-	-	-	-	296	-
Stage 2	-	-	-	-	148	-
Critical Hdwy	-	-	-	-	6.84	6.94
Critical Hdwy Stg 1	-	-	-	-	5.84	-
Critical Hdwy Stg 2	-	-	-	-	5.84	-
Follow-up Hdwy	-	-	-	-	3.52	3.32
Pot Cap-1 Maneuver	-	-	0	-	542	862
Stage 1	-	-	0	-	729	-
Stage 2	-	-	0	-	864	-
Platoon blocked, %	-	-		-		
Mov Cap-1 Maneuver	-	-	-	-	542	862
Mov Cap-2 Maneuver	-	-	-	-	542	-
Stage 1	-	-	-	-	729	-
Stage 2	-	-	-	-	864	-

Approach	EB	WB	NB
HCM Control Delay, s	0	0	10.1
HCM LOS			B

Minor Lane/Major Mvmt	NBLn1	EBT	EBR	WBT
Capacity (veh/h)	862	-	-	-
HCM Lane V/C Ratio	0.177	-	-	-
HCM Control Delay (s)	10.1	-	-	-
HCM Lane LOS	B	-	-	-
HCM 95th %tile Q(veh)	0.6	-	-	-

Intersection	
Int Delay, s/veh	1.5

Movement	EBL	EBR	NBL	NBT	SBT	SBR
Lane Configurations						
Traffic Vol, veh/h	0	81	78	1001	1208	117
Future Vol, veh/h	0	81	78	1001	1208	117
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Stop	Stop	Free	Free	Free	Free
RT Channelized	-	None	-	None	-	None
Storage Length	-	0	0	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	0	88	85	1088	1313	127

Major/Minor	Minor2		Major1		Major2	
Conflicting Flow All	-	657	1440	0	-	0
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-
Critical Hdwy	-	7.14	5.34	-	-	-
Critical Hdwy Stg 1	-	-	-	-	-	-
Critical Hdwy Stg 2	-	-	-	-	-	-
Follow-up Hdwy	-	3.92	3.12	-	-	-
Pot Cap-1 Maneuver	0	349	239	-	-	-
Stage 1	0	-	-	-	-	-
Stage 2	0	-	-	-	-	-
Platoon blocked, %				-	-	-
Mov Cap-1 Maneuver	-	349	239	-	-	-
Mov Cap-2 Maneuver	-	-	-	-	-	-
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-

Approach	EB	NB	SB
HCM Control Delay, s	18.8	2	0
HCM LOS	C		

Minor Lane/Major Mvmt	NBL	NBT	EBLn1	SBT	SBR
Capacity (veh/h)	239	-	349	-	-
HCM Lane V/C Ratio	0.355	-	0.252	-	-
HCM Control Delay (s)	28.1	-	18.8	-	-
HCM Lane LOS	D	-	C	-	-
HCM 95th %tile Q(veh)	1.5	-	1	-	-

Intersection	
Int Delay, s/veh	0.8

Movement	EBT	EBR	WBL	WBT	NBL	NBR
Lane Configurations						
Traffic Vol, veh/h	141	7	0	249	2	37
Future Vol, veh/h	141	7	0	249	2	37
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Free	Free	Free	Free	Stop	Stop
RT Channelized	-	None	-	None	-	None
Storage Length	-	-	-	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	153	8	0	271	2	40

Major/Minor	Major1		Major2		Minor1	
Conflicting Flow All	0	0	-	-	293	81
Stage 1	-	-	-	-	157	-
Stage 2	-	-	-	-	136	-
Critical Hdwy	-	-	-	-	6.84	6.94
Critical Hdwy Stg 1	-	-	-	-	5.84	-
Critical Hdwy Stg 2	-	-	-	-	5.84	-
Follow-up Hdwy	-	-	-	-	3.52	3.32
Pot Cap-1 Maneuver	-	-	0	-	674	963
Stage 1	-	-	0	-	855	-
Stage 2	-	-	0	-	876	-
Platoon blocked, %	-	-		-		
Mov Cap-1 Maneuver	-	-	-	-	674	963
Mov Cap-2 Maneuver	-	-	-	-	674	-
Stage 1	-	-	-	-	855	-
Stage 2	-	-	-	-	876	-

Approach	EB	WB	NB
HCM Control Delay, s	0	0	8.9
HCM LOS			A

Minor Lane/Major Mvmt	NBLn1	EBT	EBR	WBT
Capacity (veh/h)	963	-	-	-
HCM Lane V/C Ratio	0.042	-	-	-
HCM Control Delay (s)	8.9	-	-	-
HCM Lane LOS	A	-	-	-
HCM 95th %tile Q(veh)	0.1	-	-	-

Intersection	
Int Delay, s/veh	0.1

Movement	EBL	EBR	NBL	NBT	SBT	SBR
Lane Configurations						
Traffic Vol, veh/h	0	6	17	1274	978	37
Future Vol, veh/h	0	6	17	1274	978	37
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Stop	Stop	Free	Free	Free	Free
RT Channelized	-	None	-	None	-	None
Storage Length	-	0	0	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	0	7	18	1385	1063	40

Major/Minor	Minor2		Major1		Major2	
Conflicting Flow All	-	532	1103	0	-	0
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-
Critical Hdwy	-	7.14	5.34	-	-	-
Critical Hdwy Stg 1	-	-	-	-	-	-
Critical Hdwy Stg 2	-	-	-	-	-	-
Follow-up Hdwy	-	3.92	3.12	-	-	-
Pot Cap-1 Maneuver	0	421	349	-	-	-
Stage 1	0	-	-	-	-	-
Stage 2	0	-	-	-	-	-
Platoon blocked, %				-	-	-
Mov Cap-1 Maneuver	-	421	349	-	-	-
Mov Cap-2 Maneuver	-	-	-	-	-	-
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-

Approach	EB	NB	SB
HCM Control Delay, s	13.7	0.2	0
HCM LOS	B		

Minor Lane/Major Mvmt	NBL	NBT	EBLn1	SBT	SBR
Capacity (veh/h)	349	-	421	-	-
HCM Lane V/C Ratio	0.053	-	0.015	-	-
HCM Control Delay (s)	15.9	-	13.7	-	-
HCM Lane LOS	C	-	B	-	-
HCM 95th %tile Q(veh)	0.2	-	0	-	-

Intersection	
Int Delay, s/veh	2.1

Movement	EBT	EBR	WBL	WBT	NBL	NBR
Lane Configurations						
Traffic Vol, veh/h	261	29	0	275	4	141
Future Vol, veh/h	261	29	0	275	4	141
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Free	Free	Free	Free	Stop	Stop
RT Channelized	-	None	-	None	-	None
Storage Length	-	-	-	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	284	32	0	299	4	153

Major/Minor	Major1		Major2		Minor1	
Conflicting Flow All	0	0	-	-	450	158
Stage 1	-	-	-	-	300	-
Stage 2	-	-	-	-	150	-
Critical Hdwy	-	-	-	-	6.84	6.94
Critical Hdwy Stg 1	-	-	-	-	5.84	-
Critical Hdwy Stg 2	-	-	-	-	5.84	-
Follow-up Hdwy	-	-	-	-	3.52	3.32
Pot Cap-1 Maneuver	-	-	0	-	538	859
Stage 1	-	-	0	-	725	-
Stage 2	-	-	0	-	862	-
Platoon blocked, %	-	-		-		
Mov Cap-1 Maneuver	-	-	-	-	538	859
Mov Cap-2 Maneuver	-	-	-	-	538	-
Stage 1	-	-	-	-	725	-
Stage 2	-	-	-	-	862	-

Approach	EB	WB	NB
HCM Control Delay, s	0	0	10.1
HCM LOS			B

Minor Lane/Major Mvmt	NBLn1	EBT	EBR	WBT
Capacity (veh/h)	859	-	-	-
HCM Lane V/C Ratio	0.178	-	-	-
HCM Control Delay (s)	10.1	-	-	-
HCM Lane LOS	B	-	-	-
HCM 95th %tile Q(veh)	0.6	-	-	-

Intersection	
Int Delay, s/veh	1.5

Movement	EBL	EBR	NBL	NBT	SBT	SBR
Lane Configurations						
Traffic Vol, veh/h	0	82	79	1011	1220	118
Future Vol, veh/h	0	82	79	1011	1220	118
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Stop	Stop	Free	Free	Free	Free
RT Channelized	-	None	-	None	-	None
Storage Length	-	0	0	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	0	89	86	1099	1326	128

Major/Minor	Minor2		Major1		Major2	
Conflicting Flow All	-	663	1454	0	-	0
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-
Critical Hdwy	-	7.14	5.34	-	-	-
Critical Hdwy Stg 1	-	-	-	-	-	-
Critical Hdwy Stg 2	-	-	-	-	-	-
Follow-up Hdwy	-	3.92	3.12	-	-	-
Pot Cap-1 Maneuver	0	346	235	-	-	-
Stage 1	0	-	-	-	-	-
Stage 2	0	-	-	-	-	-
Platoon blocked, %				-	-	-
Mov Cap-1 Maneuver	-	346	235	-	-	-
Mov Cap-2 Maneuver	-	-	-	-	-	-
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-

Approach	EB	NB	SB
HCM Control Delay, s	19	2.1	0
HCM LOS	C		

Minor Lane/Major Mvmt	NBL	NBT	EBLn1	SBT	SBR
Capacity (veh/h)	235	-	346	-	-
HCM Lane V/C Ratio	0.365	-	0.258	-	-
HCM Control Delay (s)	28.9	-	19	-	-
HCM Lane LOS	D	-	C	-	-
HCM 95th %tile Q(veh)	1.6	-	1	-	-

Intersection	
Int Delay, s/veh	1.5

Movement	EBT	EBR	WBL	WBT	NBL	NBR
Lane Configurations						
Traffic Vol, veh/h	128	33	0	249	2	77
Future Vol, veh/h	128	33	0	249	2	77
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Free	Free	Free	Free	Stop	Stop
RT Channelized	-	None	-	None	-	None
Storage Length	-	-	-	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	139	36	0	271	2	84

Major/Minor	Major1		Major2		Minor1	
Conflicting Flow All	0	0	-	-	293	88
Stage 1	-	-	-	-	157	-
Stage 2	-	-	-	-	136	-
Critical Hdwy	-	-	-	-	6.84	6.94
Critical Hdwy Stg 1	-	-	-	-	5.84	-
Critical Hdwy Stg 2	-	-	-	-	5.84	-
Follow-up Hdwy	-	-	-	-	3.52	3.32
Pot Cap-1 Maneuver	-	-	0	-	674	953
Stage 1	-	-	0	-	855	-
Stage 2	-	-	0	-	876	-
Platoon blocked, %	-	-		-		
Mov Cap-1 Maneuver	-	-	-	-	674	953
Mov Cap-2 Maneuver	-	-	-	-	674	-
Stage 1	-	-	-	-	855	-
Stage 2	-	-	-	-	876	-

Approach	EB	WB	NB
HCM Control Delay, s	0	0	9.1
HCM LOS			A

Minor Lane/Major Mvmt	NBLn1	EBT	EBR	WBT
Capacity (veh/h)	953	-	-	-
HCM Lane V/C Ratio	0.088	-	-	-
HCM Control Delay (s)	9.1	-	-	-
HCM Lane LOS	A	-	-	-
HCM 95th %tile Q(veh)	0.3	-	-	-

Intersection	
Int Delay, s/veh	0.6

Movement	EBL	EBR	NBL	NBT	SBT	SBR
Lane Configurations						
Traffic Vol, veh/h	0	41	53	1256	957	79
Future Vol, veh/h	0	41	53	1256	957	79
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Stop	Stop	Free	Free	Free	Free
RT Channelized	-	None	-	None	-	None
Storage Length	-	0	0	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	0	45	58	1365	1040	86

Major/Minor	Minor2		Major1		Major2	
Conflicting Flow All	-	520	1126	0	-	0
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-
Critical Hdwy	-	7.14	5.34	-	-	-
Critical Hdwy Stg 1	-	-	-	-	-	-
Critical Hdwy Stg 2	-	-	-	-	-	-
Follow-up Hdwy	-	3.92	3.12	-	-	-
Pot Cap-1 Maneuver	0	429	340	-	-	-
Stage 1	0	-	-	-	-	-
Stage 2	0	-	-	-	-	-
Platoon blocked, %				-	-	-
Mov Cap-1 Maneuver	-	429	340	-	-	-
Mov Cap-2 Maneuver	-	-	-	-	-	-
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-

Approach	EB	NB	SB
HCM Control Delay, s	14.4	0.7	0
HCM LOS	B		

Minor Lane/Major Mvmt	NBL	NBT	EBLn1	SBT	SBR
Capacity (veh/h)	340	-	429	-	-
HCM Lane V/C Ratio	0.169	-	0.104	-	-
HCM Control Delay (s)	17.7	-	14.4	-	-
HCM Lane LOS	C	-	B	-	-
HCM 95th %tile Q(veh)	0.6	-	0.3	-	-

Intersection	
Int Delay, s/veh	2.4

Movement	EBT	EBR	WBL	WBT	NBL	NBR
Lane Configurations						
Traffic Vol, veh/h	251	49	0	275	4	170
Future Vol, veh/h	251	49	0	275	4	170
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Free	Free	Free	Free	Stop	Stop
RT Channelized	-	None	-	None	-	None
Storage Length	-	-	-	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	273	53	0	299	4	185

Major/Minor	Major1		Major2		Minor1	
Conflicting Flow All	0	0	-	-	450	163
Stage 1	-	-	-	-	300	-
Stage 2	-	-	-	-	150	-
Critical Hdwy	-	-	-	-	6.84	6.94
Critical Hdwy Stg 1	-	-	-	-	5.84	-
Critical Hdwy Stg 2	-	-	-	-	5.84	-
Follow-up Hdwy	-	-	-	-	3.52	3.32
Pot Cap-1 Maneuver	-	-	0	-	538	853
Stage 1	-	-	0	-	725	-
Stage 2	-	-	0	-	862	-
Platoon blocked, %	-	-		-		
Mov Cap-1 Maneuver	-	-	-	-	538	853
Mov Cap-2 Maneuver	-	-	-	-	538	-
Stage 1	-	-	-	-	725	-
Stage 2	-	-	-	-	862	-

Approach	EB	WB	NB
HCM Control Delay, s	0	0	10.4
HCM LOS			B

Minor Lane/Major Mvmt	NBLn1	EBT	EBR	WBT
Capacity (veh/h)	853	-	-	-
HCM Lane V/C Ratio	0.217	-	-	-
HCM Control Delay (s)	10.4	-	-	-
HCM Lane LOS	B	-	-	-
HCM 95th %tile Q(veh)	0.8	-	-	-

Intersection	
Int Delay, s/veh	2.3

Movement	EBL	EBR	NBL	NBT	SBT	SBR
Lane Configurations						
Traffic Vol, veh/h	0	107	106	997	1205	149
Future Vol, veh/h	0	107	106	997	1205	149
Conflicting Peds, #/hr	0	0	0	0	0	0
Sign Control	Stop	Stop	Free	Free	Free	Free
RT Channelized	-	None	-	None	-	None
Storage Length	-	0	0	-	-	0
Veh in Median Storage, #	0	-	-	0	0	-
Grade, %	0	-	-	0	0	-
Peak Hour Factor	92	92	92	92	92	92
Heavy Vehicles, %	2	2	2	2	2	2
Mvmt Flow	0	116	115	1084	1310	162

Major/Minor	Minor2		Major1		Major2	
Conflicting Flow All	-	655	1472	0	-	0
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-
Critical Hdwy	-	7.14	5.34	-	-	-
Critical Hdwy Stg 1	-	-	-	-	-	-
Critical Hdwy Stg 2	-	-	-	-	-	-
Follow-up Hdwy	-	3.92	3.12	-	-	-
Pot Cap-1 Maneuver	0	350	230	-	-	-
Stage 1	0	-	-	-	-	-
Stage 2	0	-	-	-	-	-
Platoon blocked, %				-	-	-
Mov Cap-1 Maneuver	-	350	230	-	-	-
Mov Cap-2 Maneuver	-	-	-	-	-	-
Stage 1	-	-	-	-	-	-
Stage 2	-	-	-	-	-	-

Approach	EB	NB	SB
HCM Control Delay, s	20.3	3.4	0
HCM LOS	C		

Minor Lane/Major Mvmt	NBL	NBT	EBLn1	SBT	SBR
Capacity (veh/h)	230	-	350	-	-
HCM Lane V/C Ratio	0.501	-	0.332	-	-
HCM Control Delay (s)	35.4	-	20.3	-	-
HCM Lane LOS	E	-	C	-	-
HCM 95th %tile Q(veh)	2.6	-	1.4	-	-

APPENDIX **C**

QUEUEING ANALYSIS WORKSHEET

DRIVE-THROUGH QUEUING ANALYSIS

Project: Amy's Drive Through
Location: Aliso Viejo

INPUT VALUES

Variable	Description	Value
A =	average number of vehicle arrivals per hour [1]	63
S =	service rate, number of vehicles per hour	73
I =	traffic intensity, utilization factor = A/S	0.86
Q =	queue capacity (vehicles)	18

FORMULAS

Average Length of Queue

$$\text{Avg } Q = A^2 / S(S-A) = I^2 / 1-I$$ 5.44

Probability of Q Number of Vehicles in Queue

$$P(Q) = (I)^Q (1-I)$$ 0.97%

Probability of Queue Exceeding Q Vehicles

$$\sum_{Q=0}^{Q=a} P(Q) \geq 0.95$$ 6.09%

[1] Based on information provided by Amy's Drive Through (Nov 11, 2021)

Source: Institute of Transportation Engineers (ITE)
Transportation Planning Handbook, 3rd Edition

Amy's Drive-Thru

26641 Aliso Creek Road

PA21-016 (SDP/AUP/EP) – Site Development Permit, Administrative Use Permit, & Exception Permit

City Council
January 19, 2022

Project Details

PA21-016 (SDP/AUP/EP) includes applications for:

- ***Site Development Permit*** – demolition of existing building and new construction of new restaurant building
- ***Administrative Use Permit*** – Outdoor Dining
- ***Exception Permit*** - Parking deficiency over 15%

26641 Aliso Creek Road

Existing Conditions:

- 57,743 s.f. site
- Vacant 8,168 s.f. building
- Former restaurant space
- 82 parking spaces onsite



Amy's DRIVE THRU

- Founded by Amy's Kitchen – 35 years of manufacturing vegetarian and vegan meals
- Plant-based take on American Fast Food
- Locations:
  - Rohnert Park
  - SF Airport
  - Corte Madera
  - Roseville
  - Thousand Oaks (opening early 2022)

Amy's Drive-Thru: *Exterior Improvements*

- New 5,173 s.f. Restaurant Building
  - 4,558 s.f. restaurant
  - 615 s.f. outdoor dining area
  - Agricultural/Farmhouse décor & theme
- Drive-thru
  - Requires removal of 25 parking spaces
  - Stacking area for 16 vehicles
  - 2 additional "pull-ahead" spaces
  - Car Port
  - Fencing along Enterprise

Amy's Drive-Thru: *Exterior Improvements*

- Amy's Water Tower
  - Non-functional, art-like feature
  - Adds new, visible aesthetic element at major corner of Aliso Viejo Town Center / highly trafficked intersection
  - 28'-4" feet in height
- Family Park
  - Enclosed outdoor area for customers
  - Benches, landscaping
  - Not intended for dining area

Amy's Drive-Thru: *Exterior Improvements*

- Living Roof
  - Unique, aesthetic feature on new building
  - Use of varying plant species – colors, sizes, and textures
  - Functional – increases insulation value and reducing energy requirements for interior climate control
- Landscaping
  - Extensive upgrades throughout entire parcel
  - Exceeds AVMC landscaping requirements
  - AVCA Easement – transfer of responsibility to property owner

Amy's Drive-Thru: *Parking Summary*

- New 5,173 s.f. Restaurant
  - requires 23 parking spaces (parked at 1:220 s.f.)
  - After project, 32 spaces remain on the Project parcel
  - Surplus of 9 spaces onsite
- Aliso Viejo Town Center – shared parking amongst all parcels

Aliso Viejo Parking Summary

Parking spaces required:	2,819
Parking spaces currently onsite:	2,429
Number of spaces removed (Project):	25
Total number of spaces (after Project):	2,404
Parking Deficiency:	415 / 14.7%

Amy's Drive-Thru: *Exception Permit Adequacy*

- Parking deficiency increase: 14.2% to 14.7% (11 spaces)
- Smaller building footprint than previous restaurant use
- Parking requirement met on individual Project parcel
- 60% of business is from drive-thru operations
- Location of shopping center – less density, less traffic

Amy's Drive-Thru: *Traffic & Circulation*

- Traffic & Circulation Analysis
  - Prepared by Kimley Horn & Associates
  - Required to ensure no major impacts to public rights-of-way and internal circulation patterns
  - Aliso Viejo conditions are similar to Rohnert Park conditions – used as a base for study
  - Orange County Transportation Implementation Manual
  - Institute of Transportation Engineers Transportation Planning

Amy's Drive-Thru: *Traffic & Circulation*

- Traffic & Circulation Analysis (cont.)
  - Average queue: 6 vehicles
  - Maximum weekday queue: 12 vehicles
  - Maximum weekend queue: 18 vehicles
  - Drive-thru accommodates up to 18 vehicles
  - More than 18 vehicles - estimated to occur at a low probability of 6% and for a short duration– stacking area estimated to be adequate 94% of the time
  - Condition of Approval – in the event the vehicle stacking area become inadequate impact ingress, egress, and circulation, City can require modifications to drive-thru operations or site



Entry View - New Building



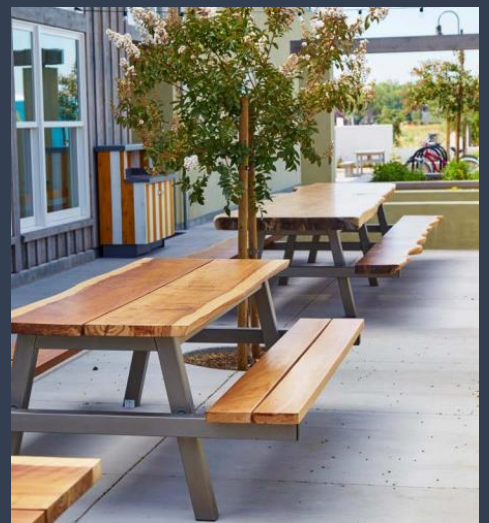
Aliso Creek Road @ Enterprise

Overall Site Plan - Rendering











Amy's Drive-Thru: Rohnert Park

Staff Recommendation to City Council:

1. Open and conduct a public hearing;
2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Section 15302 (Replacement or Reconstruction); and
3. Adopt Resolution No. 2022-__ (Attachment 2) making findings under the California Environmental Quality Act and approving Planning Application PA21-016 (SDP/AUP/EP) for a site development permit to demolish an existing building and construct a new restaurant with a drive-thru; an administrative use permit for outdoor dining; and an exception permit for a parking deficiency below 15% at 26641 Aliso Creek Road.

Amy's Drive-Thru

26641 Aliso Creek Road

PA21-016 (SDP/AUP/EP) – Site Development Permit, Administrative Use Permit, & Exception Permit

City Council
January 19, 2022

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Omar Dadabhoy, Community Development Director
Jennifer Lowe, Senior Planner

SUBJECT: REQUEST TO APPROVE PLANNING APPLICATION PA21-014 (SDP) FOR A SITE DEVELOPMENT PERMIT TO ALLOW FOR EXTERIOR MODIFICATIONS TO THE BUILDING AND PARKING LOT, INCLUDING REDESIGN OF THE PRIMARY BUILDING ELEVATION, UPGRADES TO LANDSCAPING, AND ADJUSTMENTS TO THE PARKING LOT TO SATISFY ACCESSIBILITY REQUIREMENTS, AT 7 JOURNEY AND DETERMINATION THAT PROJECT IS CATEGORICALLY EXEMPT FROM CEQA.

Recommended Actions:

1. Open and conduct a public hearing;

2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15301 (Existing Facilities); and

3. Adopt a Resolution (Attachment 1) approving Planning Application PA21-0174 (SDP) for a site development permit to allow for exterior modifications to the building and parking lot, including redesign of the primary building elevation, upgrades to landscaping, and adjustments to the parking lot to satisfy accessibility requirements, at 7 Journey.

Fiscal Impact:

There is no fiscal impact to the City associated with this discretionary action.

Background:

The building located at 7 Journey previously operated as Lew Webb's Classic Car and Event Center. The development project that included 7, 9, and 11 Journey was approved under Site Plan SP90071190001A by the County of Orange in March 1990. The project was developed to accommodate office, business, and warehouse uses.

On January 20, 2021, the City Council approved Planning Application PA18-020 (CUP/AUP) for a conditional use permit to establish a distillery, microbrewery, and tasting room; an administrative use permit to operate with a Type 6, 23, and 74 license from the Department of Alcoholic Beverage Control; and an administrative use permit for the manufacturing of alcoholic beverages from the property at 7 Journey. The Applicant, Webb's Grainworks has not yet commenced any tenant improvements to the building.

Discussion:

The Applicant requests to make exterior site renovations to the property to enhance the building façade and upgrade exterior portions of the property. The application for Planning Application PA21-014 (SDP) is for site development permit to make exterior and interior improvements to further improve the property and reflect Applicant's intended branding of the business establishment. Exterior improvements include upgrades and enhancement to landscaping and modifications to the parking lot to bring the site into conformance with accessibility requirements in accordance Chapter 11, Accessibility, of the California Building Code.

Architectural Modifications

The Applicant proposes to incorporate a train caboose as an iconic feature into primary elevation of the building. According to the Applicant, the caboose reflects the Prohibition Era theme by connecting the railroad with distillery. The Prohibition Era theme with the train caboose will be represented in the branding and interior design of the Webb's Grainworks. The intent of the caboose is to differentiate the building from similar industrial/warehouse buildings along Journey while providing a memorable and unique visual cue to the business establishment. The new caboose adds 39 square feet of new restaurant space and 17 square feet of storage spaces. To accommodate the new square footage without increasing parking space requirements, the entry was revised to remove 68 square feet from the building's square footage and a proposed office will be converted into storage area to reduce the parking requirement

Landscaping

To further enhance views of the site, the Applicant will be upgrading landscaping throughout the site. Existing eucalyptus and liquid amber trees that have caused damage by buckling the curb and drive aisles will be removed. The Applicant has selected a more contemporary plant palette that will provide an overall unifying theme while also providing an aesthetic enhancement to the building. The proposed landscape plan will provide curb appeal to the property, drawing both pedestrian and vehicular attention to the new business. Over the last few years, the slope located at the northern edge of the property has experienced a considerable amount of erosion, loss of landscaping, and exposure of irrigation lines. The Project includes repairs and replanting of the slope to create a continuous landscaped border around the site while also preventing erosion and increasing slope stabilization.

Parking

PA18-020 (CUP/AUP) required the site to meet City parking requirements; therefore, six (6) parking spaces are still required to be added onsite. To accommodate the new business establishment and meet accessible requirements, the site development permit application includes modifications to parking spaces and paths of travel within the parking lot to meet California Building Code, Chapter 11B, Accessibility to Public Buildings, Public Accommodations, Commercial Buildings and Public Housing. To ensure the property conforms to accessible requirements, the Applicant had a site inspection conducted by a Certified Access Specialist (CASp).

Additionally, adjustments to square footages to accommodate integration of the caboose in the microbrewery square footage will not change the total number of spaces required by PA18-020 (CUP/AUP). The Project requires 68 parking spaces and the property currently has 62 parking spaces onsite. However, at the completion of construction, the required six (6) parking space will be added onsite, bringing the property into conformance with City parking requirements.

General Operations	Land Use	Square Footage	# Spaces/ Sq. Ft.[1]	Required Parking
Distillery & Brewery Operations	Microbrewery	3,615	1/80	45.2
	General Light Industrial (Production)	822	1/400	2.0
	Storage	4,794	1/1,000	4.8
	Office	912	1/250	3.6
	Retail	420	1/200	2.1
	Subtotal for Brewery	*10,563*		*57.8*
Storage[2]	Storage	9,808	1/1,000	9.8
			Total Parking Required	**67.6**
			Existing No. of Spaces Onsite	**62**
			New Spaces Added to Site[3]	**6**
			Total Proposed No. of Spaces Onsite	**68**

[1] Based on gross floor area
[2] Personal storage use, not included in Project
[3] AVMC Section 15.38.020(D): any fractional space less than one-half of a parking space shall not be counted

The modifications are limited to bringing the site into conformance with accessibility requirements in accordance with Chapter 11, Accessibility, of the California Building Code. The Project is consistent with previous approvals and will increase overall parking space requirements for the site.

Environmental:

The interior and exterior modifications of Lew Webb's Classic Car and Event Center (collectively, the "Project") is categorically exempt from the California Environmental Quality Act ("CEQA"). The Project includes various improvements and infrastructure upgrades to the property, including adjustments to the use square footages, alterations

to the façade of the primary building elevation, landscape enhancements, and modifications to the parking lot. As further explained below, the Project is categorically exempt from CEQA under the Class 1 exemption in State CEQA Guidelines section 15301.

The Project falls within the Class 1 exemption, which applies to the operation, maintenance, permitting, and leasing, and minor alteration of existing public or private structures, facilities, or topographical features involving negligible or no expansion of existing or former use. (State CEQA Guidelines, § 15301.) Here, the interior and exterior modifications are considered minor alterations since they involve negligible or no expansion of use beyond that existing at the time of the City's determination and are thus all exempt from CEQA.

None of the exceptions to the categorical exemptions set forth in State CEQA Guidelines section 15300.2 have any applicability here. Specifically, the proposed project is not located in a particularly sensitive environment. Improvements will be installed on existing structures in urbanized/developed areas. The cumulative impact of successive projects of this same type in the same place over time would not be significant because these types of conversions are limited in size and number; there is a finite area that can accommodate the distillery, microbrewery, tasting room, and ancillary facilities within this existing building. The existing office building is not located within an officially designated state scenic highway. Thus, the proposed project would not have an impact in this regard. Similarly, the building is not located on a site designated pursuant to Government Code section 65962.5 (Cal/EPA Hazardous Waste and Substances Site Lists). Finally, the proposed project does not involve any improvements, modifications, or other changes to a historical resource. For all of the foregoing reasons, the entirety of the Project is categorically exempt from CEQA.

Public Notice:

On January 6, 2022, a public hearing notice was published in the Aliso Viejo News and mailed to all owners of real properties within 300 feet of the subject real property.

City Attorney:

The City Attorney has reviewed the staff report.

Attachments:

1. Resolution
2. Applicant Project Description Letter
3. Project Plans
4. Presentation

RESOLUTION NO. 2022- ____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, CALIFORNIA, APPROVING PLANNING APPLICATION PA21-014 (SDP) FOR A SITE DEVELOPMENT PERMIT TO ALLOW FOR EXTERIOR MODIFICATIONS TO THE BUILDING AND PARKING LOT, INCLUDING REDESIGN OF THE PRIMARY BUILDING ELEVATION, UPGRADES TO LANDSCAPING, AND ADJUSTMENTS TO THE PARKING LOT TO SATISFY ACCESSIBILITY REQUIREMENTS, AT 7 JOURNEY AND FINDING THE PROJECT CATEGORICALLY EXEMPT FROM CEQA

WHEREAS, on June 10, 2021, the Applicant, Robert Bunyan and Associates on behalf of Webb's Grainworks, submitted Planning Application PA21-014 (SDP) for site development permit to allow for exterior modifications to the building and parking lot, including redesign of the primary building elevation, upgrades to landscaping, and adjustments to the parking lot to satisfy accessibility requirements, at 7 Journey (Project);

WHEREAS, on January 20, 2021, the City Council approved Planning Application PA18-020 (CUP/AUP) for a conditional use permit to establish a distillery, microbrewery, and tasting room; an administrative use permit to operate with Type 6, 23, and 74 Licenses from the Department of Alcoholic Beverage Control; and an administrative use permit for manufacturing of alcoholic beverages from the property at 7 Journey;

WHEREAS, the Applicant now requests to make exterior modifications to the Project site, including alterations to the existing building façade, upgrades to landscaping, and bring the parking lot into conformance with accessibility requirements in accordance with Chapter 11 of the California Building Code;

WHEREAS, pursuant to Aliso Viejo Municipal Code (AVMC) Sections 15.74.020, the purpose of a site development permit is to ensure that new development conforms to the development and design provisions of the Zoning Code**;**

WHEREAS, pursuant to the California Environmental Quality Act (Public Resources Code, § 2100 et seq.), the State CEQA Guidelines (California Code of Regulations, Title 14, § 1500 et seq.), and the City's local CEQA Guidelines (collectively, "CEQA"), the City of Aliso Viejo ("City") is Lead Agency for purposes of the Project;

WHEREAS, in accordance with State CEQA Guidelines section 15061, the City has reviewed the proposed Project and considered existing conditions at the subject site and surrounding vicinity, to evaluate whether an exemption from CEQA applied;

WHEREAS, on January 19, 2022, the City Council held a duly noticed public hearing as prescribed by law and considered public testimony and evidence and recommendations presented by staff in the agenda report and oral presentation related to Planning Application PA21-014 (SDP); and

WHEREAS, all other legal prerequisites to the adoption of this Resolution have occurred.

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, DOES HEREBY RESOLVE, DECLARE, DETERMINE AND ORDER AS FOLLOWS:

SECTION 1. Determination of Recitals. The City Council hereby finds and determines that all of the recitals set forth above are true and correct. The above recitals are hereby incorporated as substantive findings of this Resolution.

SECTION 2. Compliance with CEQA. The City Council finds the proposed project (e.g. the adjustments to the use square footages, alterations to the façade of the primary building elevation, landscape enhancements, and modifications to the parking lot) is categorically exempt from the California Environmental Quality Act (CEQA) pursuant to a Class 1 exemption. The minor modifications to the interior and exterior of the building would involve only a negligible expansion of that existing use. (State CEQA Guidelines, § 15301 [Class 1 exemption applies to the operation, repair, maintenance, permitting, leasing, or minor alteration of existing structures, facilities, or topographical features involving negligible or no expansion of existing or former use].). Tenant improvements associated with the project involve adjustments to the use square footages within the building where work shall be limited to the moving and construction of interior walls and electrical and plumbing work. Exterior modifications include alterations to the façade of the primary building elevation, landscape enhancements, and modifications the parking lot to bring the property into conformance with accessibility requirements as required by the California Building Code. No additional improvements beyond the existing property boundaries are needed. Therefore, the proposed project is exempt from CEQA pursuant to State CEQA Guidelines, section 15301.

None of the exceptions to the categorical exemptions set forth in State CEQA Guidelines section 15300.2 have any applicability here. Specifically, the proposed project is not located in a particularly sensitive environment. Improvements will be installed on existing structures in urbanized/developed areas. The cumulative impact of successive projects of this same type in the same place over time would not be significant because these types of conversions are limited in size and number; there is a finite area that can accommodate the distillery, microbrewery, tasting room, and ancillary facilities within this existing building. The existing office building is not located within an officially designated state scenic highway. Thus, the proposed project would not have an impact in this regard. Similarly, the building is not located on a site designated pursuant to Government Code section 65962.5 (Cal/EPA Hazardous Waste and Substances Site Lists). Finally, the proposed project does not involve any improvements, modifications, or other changes to a historical resource. For all of the foregoing reasons, the entirety of the Project is categorically exempt from CEQA.

SECTION 3. Approval of Project and Findings for Site Development Permit. In accordance with AVMC 15.74.020(D), the City Council hereby approves Planning Application PA21-014 (SDP) for major exterior renovations to a

property, subject to the conditions set forth in Exhibit "A" and project plans set forth in Exhibit "B", which are exhibits are both attached hereto and incorporated herein by reference.

1. *Consistency with General Plan. The project is consistent with the General Plan and any applicable specific plan.*

   The Business Park land use designation provides for a range of light industrial uses, supporting offices, and services. Permitted uses include light industrial, limited service and retail commercial, offices. Under the General Plan, the City is encouraged to "provide a diverse mix of land sues to meet the future needs of all residents and the business community" and Land Use Policy LU-1.2 "attract a broad range of additional retail, medical, and office uses providing employment at all income levels and making a positive contribution to the City's tax base". The proposed modifications the building support the proposed distillery, winery, and microbrewery, which is consistent with permitted uses in this land use designation and consistent with the goals and policies of the General Plan.

2. *Consistency with Zoning Code. The land use and associated development conform to the permitted use provisions and development standards of this Zoning Code and is consistent with this Code and any applicable specific plan.*

   The Business Park 1 ("BP-1") zoning district is consistent with the General Plan Business Park land use designation by providing business and employment generating development, including a range light industrial uses and supporting offices and services. The Project includes modifications and upgrades to the building and exterior site improvements for permitted uses in the BP-1 zone. The building conforms to all development standards since the Project does not include modifications the building in regard to building height or encroachment into setback areas. The Project is in compliance the design standards for the BP-1 district and other development regulations, including parking, trash enclosure, screening of equipment, lighting, and other security elements established in AVMC Title 15, Appendix A: requirements for Crime Prevention Through Environmental Design ("CPTED"). Furthermore, landscaping will be brought into conformance with City requirements in regard to landscape coverage in parking and non-parking areas, selected plant palette, and water quality standards. As proposed, the Project meets the use and development standards established in the Zoning Code.

3. *Compliance with CEQA. Processing and approval of the permit application are in compliance with the requirements of the California Environmental Quality Act.*

   See Section 2 above.

4. *Architectural Design. The architectural design of the project, including but not limited to the architectural style, scale, building mass, materials, colors, architectural details, roof style are compatible with surrounding development.*

The overall architectural design of the Project focuses on the primarily on the portion of the building that will be occupied by the distillery, winery, and brewery. According to the Applicant, the integration of a real train caboose is to reflect the interior design of a Prohibition Era establishment and representative of the names of the various alcohols manufactured onsite. The caboose will be restored and retrofitted to become a portion of the tasting area's dining room. The external appearance of the caboose will retain a patina finish, intended to reflect authenticity of a working train caboose. The exterior of the building will resemble a warehouse building that has been retrofitted to accommodate the distillery, winery, and brewery. The entire building will be upgraded with new windows and paint with new awnings installed on the distillery side of the building. The building's design is intended to complement the existing development in the business park while also introducing the caboose feature, an element that will and a unique feature to the building while also drawing attention to the new business establishment.

5. *Site Design. The site design of the project, including but not limited to project entries, interior circulation, pedestrian and bicycle access, pedestrian amenities, screening of equipment and trash enclosures, exterior lighting, and other site design elements are compatible with surrounding development.*

   The Project includes modifications to an existing building site and parking lot area. Changes to the site design are limited to alterations to the building façade, landscaping upgrades, and modifications to the parking lot to bring the site into conformance with accessible requirements of the California Building Code. The Project does not propose changes to either the number of vehicular entrances nor circulation patterns onsite. The trash enclosure will be brought into conformance with the AVMC requirements and include a new sewer drain to satisfy all design and water quality requirement. All service areas and equipment will be adequately screened from view and exterior lighting will meet all lighting requirements as established in Appendix A: CPTED of AVMC Title 15, Zoning Code.

6. *Landscape Design. Project landscaping, including but not limited to the location, type, size, color, texture, and coverage of plant materials, has been designed so as to provide visual relief, complement buildings, visually emphasize prominent design elements and vistas, screen undesirable views, provide a harmonious transition between adjacent land uses and between development and open space, and provide an overall unifying influence to enhance the visual continuity of the project.*

   Landscaping on the site will be brought into conformance with the landscaping standards identified in the Aliso Viejo Municipal Code. The Project proposes to upgrade landscaping throughout the site, with special attention paid to the landscaping along the front elevation and most visible to Journey. The landscaping design will provide an overall unifying theme and enhance views to the site from the public right-of-way. The landscape plan shows the removal of existing eucalyptus and liquid amber trees that have damaged the planters and drive aisles and impede adequate site lighting. The slope located at the northern portion of the site has experienced

erosion over the last few years. The Project includes repair and replanting of the slope to improve the views of the slope and ensure long-term stabilization. The proposed plant palette will soften, complement, and emphasize prominent design elements, screen undesirable views, and provide an overall unifying influence to enhance the visual continuity of the project. The location, type, size, color, texture, and coverage of plant materials will be required to be designed to provide visual relief and complement the building and accessory structures.

SECTION 6. Filing of Notice of Exemption. The City Council hereby authorizes and directs staff to prepare, execute and file with the Orange County Clerk a Notice of Exemption for the proposed Project. Additionally, the Notice of Exemption for this project will be posted on the City of Aliso Viejo website, filed in the State Clearinghouse CEQAnet website, and provide the notice to parties requesting NOE notification.

SECTION 7. Location of Documents. The administrative record for the Project is maintained at City Hall located at 12 Journey, Suite 100, Aliso Viejo, CA 92656. The custodian of records is the City Clerk.

PASSED, APPROVED AND ADOPTED this 19th day of January 2022.

_____
Ross Chun
Mayor

APPROVED AS TO FORM:

_____
Scott C. Smith
City Attorney

ATTEST:

_____
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 foregoing Resolution No. 2022-___ was duly passed and adopted by the City Council of the City of Aliso Viejo at their regular meeting held on the 19th day of January 2022, by the following roll call vote, to wit:

AYES:

NOES:

ABSENT:

_____
MITZI ORTIZ
CITY CLERK

(SEAL)

I hereby certify that the foregoing is the original of Resolution No. 2022-__ duly passed and adopted by the Aliso Viejo City Council at its regular meeting held January 19, 2022.

_____
MITZI ORTIZ
CITY CLERK

(SEAL)

EXHIBIT "A"
PLANNING APPLICATION PA21-014 (SDP)
CONDITIONS OF APPROVAL

1. Approval of the Planning Application PA21-014 (SDP) for site development permit to allow for exterior modifications to the building and parking lot, including redesign of the primary building elevation, upgrades to landscaping, and adjustments to the parking lot to satisfy accessibility requirements, at 7 Journey, Aliso Viejo, CA in accordance with all plans and exhibits as presented to and approved by the City Council on January 20, 2021.

2. This approval constitutes a precise plan for location and design of uses, structures, features and materials submitted with this application. Development shall occur substantially as shown on the plans and description letter approved for this Project and on file in with the Department of Planning Services, subject to any modifications imposed by the conditions of approval herein, as confirmed by the Community Development Director. Any land use, construction or improvement not specifically approved by this use permit is not permitted and must be addressed in a separate and subsequent application and review. Relocation, alteration or addition to any use, structure, feature or material not specifically approved shall require an amendment to the approved plans unless the Community Development Director determines such modifications are minor and consistent with the spirit and intent of the original approving action, and that the action would have been the same for the modifications as for the approved plans. The Community Development Director may approve such minor modifications in accordance with AVMC Section 15.74.110.

3. For the purpose of Planning Application PA21-014 (SDP) and as referenced in the conditions, "Applicant" shall apply to Webb's Grainworks, owner, operator, and any and all future successors and/or assigns of the approved establishment.

4. The Applicant shall be responsible for payment of all applicable fees along with reimbursement for all City expenses in ensuring compliance with conditions. All fees and expenses shall be paid in full prior to issuance of a certificate of occupancy. Prior to issuance of applicable City approvals or permits, the applicant shall be fully responsible for reimbursing the City of Aliso Viejo for all expenses incurred to process the application and assure compliance with all conditions of approval.

5. The Applicant shall be fully responsible for knowing and complying with all conditions of approval, including making conditions known to City Staff for future governmental permits or actions on the project site. Failure to abide by and faithfully comply with any and all conditions attached to the granting of these permits may constitute grounds for revocation of the permit(s) in accordance with AVMC Section 15.74.120.

6. To the fullest extent under the law and at its sole and absolute cost, the Owner/Developer, and Owner/Developer's successors, heirs, and assigns shall protect, defend with counsel reasonably acceptable to the City , indemnify, and hold

harmless the City, its officials, officers, employees, consultants, subcontractors, agents, and representatives (collectively, "Indemnitees") from any and all claims, actions, or proceedings against Indemnitee(s) brought pursuant to the Planning and Zoning Law, the Subdivision Map Act, the California Environmental Quality Act, the federal Clean Water Act, the Porter Cologne Water Quality Control Act or any other law, permit or regulation in order to attack, set aside, void, annul, or seek to impose liability on the City for granting the approval granted by this Resolution, including, without limitation, any alleged act or omission by Indemnitee(s) related to County of Orange SP 93109 and/or any related parking agreements, conditions, or regulations, which action is brought for declaratory relief, injunctive relief, specific performance, or for any monetary claims (including, but not limited to, fines, fees, penalties, expert witness fees, attorneys' fees, and other related costs and expenses). This provision shall not be restricted to insurance proceeds, if any, received by the Owner/Developer or Indemnitee(s). Moreover, this provision shall survive any expiration, termination, or revocation of this approval or related approvals.

7. All signs shall be maintained on the property in accordance with the Municipal Code and any adopted Sign Program in effect for the property.

8. This Resolution and Conditions of Approval shall be incorporated into building plans to all applicable reviewing agencies or authorities.

9. Tenant improvements shall be submitted for review, approved and permits issued, and shall comply with standards, regulations and requirements of current editions of the California Building Code, California Plumbing Code and California Mechanical Code, California Electrical Code, including any local amendments adopted by the City of Aliso Viejo.

10. Tenant improvements shall be submitted for review, approved and permits issued, and shall comply with standards, regulations and requirements of the Americans with Disabilities Act. At the discretion of the Building Official, the Applicant may be required to retain a Certified Access Specialist (CASp) to ensure compliance with applicable construction-related accessibility standards.

11. Roof-mounted mechanical equipment such as air conditioning, heating or ventilating units or ducting shall be screened from a horizontal line of sight. Such screening shall be architecturally consistent with the building and an integral part of the roof design so as not to appear as an architectural "afterthought." For flat roofs, an architecturally consistent screen enclosure behind the parapet wall may be used if it is made to appear as an integral part of the building. The ground-mounting of mechanical equipment, with appropriate wall or landscape screening, as an alternative to roof mounting is encouraged.

12. Prior to issuance of temporary or final certificate of occupancy, all OCFA inspections shall be completed to the satisfaction of the OCFA inspector and be in substantial compliance with codes and standards applicable to the project and commensurate with the type of occupancy (temporary or final) requested. Inspections shall be

scheduled at least five days in advance by calling OCFA Inspection Scheduling at (714) 573-6150.

13. At no time shall any portion of the property owner's personal storage area adjacent to the distillery, microbrewery, tasting room, and ancillary facilities be used for business operations or storage. No personal items shall be stored outside the building.

14. The storage of any merchandise, materials, or equipment outside the building shall be prohibited.

15. The Project shall be subject to the requirements of Title 15 Zoning Code, Appendix A Crime Prevention Through Environmental Design ("CPTED"). Based on the City Crime Prevention Specialist shall review and inspection of the Project, the Applicant shall make the required improvements and submit the necessary documentation showing compliance to the satisfaction of the Crime Prevention Specialist.

16. Security cameras shall be installed per the satisfaction of the Director of Police Services. The security camera footage shall be kept for at least 30 days and available to the Orange County Sheriff Department (OCSD) within 24 hours if such usage is necessary.

17. Above ground obstructions (utility cabinets, mailboxes, etc.) are to be placed within right-of-way landscaping areas whenever possible and shall be screened subject to the approval of the Community Development Director. When above ground obstructions are to be placed within sidewalk, a minimum five (5) foot clear sidewalk width must be provided around the obstruction.

18. All backflow preventers, transformers, and other above-grade utilities shall be appropriately screened from public with walls and/or plantings, unless prohibited by another governing agency.

19. The trash enclosure shall be modified to conform to the design standards of the responsible disposal company.

    a. The enclosure shall be constructed on a concrete pad provided with a floor drain connection to the sanitary sewer system or other approved containment method to the satisfaction of the city engineer. Interior concrete or metal curbs shall be provided to prevent damage to the enclosure's walls from collisions with heavy containers.

    b. The enclosure shall be constructed on a concrete pad provided with a floor drain connection to the sanitary sewer system or other approved containment method to the satisfaction of the city engineer. Interior concrete or metal curbs shall be provided to prevent damage to the enclosure's walls from collisions with heavy containers.

c. The enclosure shall be provided with a solid overhead cover integrated into the enclosure design and approved by the planning director and city engineer.

d. Enclosures shall consist of a solid wall on three sides at least six feet in height and a solid self-latching gate on the fourth side at least five feet in height. Gates shall be metal or metal-framed, of heavy-duty construction sufficient to withstand hard usage and shall be attached to metal posts securely anchored into the ground. Gates shall be maintained in good working order and shall remain closed except when in use. Walls and gates shall be consistent with the colors and finishes of nearby buildings.

e. The use of plastic or corrugated metal for enclosure walls or overhead covers is prohibited.

f. In the event the existing trash enclosure needs to be expanded or redesigned, the enclosure design shall conform to the requirements established in AVMC Section 15.62.080(F) and subject to the review and approval of the Community Development Director and City Engineer.

20. The caboose installed along the primary façade shall be restored to an appropriate level that is safe for occupancy and free of any defect in installation that could comprise the health, safety, and welfare of the general public. Furthermore, the caboose shall be maintained in a safe, operable condition and retain an aesthetic appearance consistent with the design objectives of this site development permit.

21. All parking spaces onsite shall be made available for the parking of vehicles. The Applicant shall ensure its ability to secure and shall secure and maintain the necessary onsite parking spaces for all business operations at all times. If onsite parking is found to be inadequate for any reason, including, without limitation, verified traffic counts by the City or a court, binding arbiter, or similar judicial officer determines that parking obligations in County of Orange SP93109 and/or related parking agreements are still effective, the Community Development Director may require, in his or her sole discretion, that the applicant take action(s), including, without limitation, reduce operations or hours of operation at 7 Journey so that the use will meet AVMC requirements and to ensure all necessary parking will be provided and maintained onsite at all times. If the applicant fails to secure and maintain necessary parking onsite, the Community Development Director may also require the Applicant to cease operations until an adequate solution can be found.

22. The Applicant shall submit a detailed landscape plan for the site, which may require a Landscape Permit from the Department of Public Works. The landscape plan shall include the slope area located on the northern portion of the lot. Landscape submittal shall address slope enhancement, repair, and maintenance. All landscaping work shall be completed and inspected prior to issuance of a Certificate of Occupancy.

23. New parking spaces along the front of the property shall include landscaping to adequately screen vehicles from view from the Journey.

24. Landscape plans shall include planting that conform to the following minimum size and planting density standards:

    a. Trees.

        i. Minimum size: eight feet high (measured from the top of container) with at least 30 percent to be minimum 24-inch box size.

        ii. Maximum spacing in parkways, entry drives, street medians, parking lot planter strips, and project boundary strips: average 30 feet. Trees may be planted either in irregular clusters or at equal intervals provided the preceding average spacing is achieved.

    b. Shrubs.

        i. Minimum size: one gallon minimum with at least 30 percent to be five-gallon.

        ii. Maximum spacing: average 10 feet.

    c. Vines. As required to augment groundcover and/or provide screening for retaining walls.

    d. Groundcover. Hand-planted plugs with minimum density of one foot on center, or other density as approved by the director, or hydroseeding utilizing seed mixture approved by the director. Either of the preceding methods or a combination of the two shall be sufficient, in the director's judgment, to meet a goal of 100 percent slope coverage within one year of planting.

25. The Owner/Developer shall obtain a temporary use for the temporary placement of a trailer or relocatable building or the temporary use of a permanent structure on an active construction site as a construction and/or watchman's office, and the establishment of a temporary materials and equipment storage yard subject to the requirements established in AVMC 15.22.170 prior to issuance of any permit.

26. If any hazardous waste is encountered during construction of any portion of this project, all work shall be immediately stopped on that portion of the project, and the Orange County Health Care Agency (OCHCA), the Orange County Fire Authority (OCFA), the Orange County Sheriff's Department (OCSD), and the Director of Public Works shall be notified immediately. Work on that portion shall not continue until clearance has been issued by all of these agencies.

27. The Owner/Developer shall utilize prudent and reasonable measures to prevent unauthorized persons from entering the work site at any time and to protect the public from accidents and injury arising from the construction of the project.

28. All workers and visitors to the site must observe a 10-mile per hour speed limit in the construction area.

29. All portions of the project site shall be continuously maintained free of litter or debris during construction per SWPPP and CAL-OSHA requirements.

30. The Project shall use low VOC cleaning supplies.

31. The Owner/Developer and its contractors shall ensure that either water-based or low-VOC coating with a VOC coating of 50 grams per liter (lower than SCAQMD Rule 1113) be utilized to apply the architectural coatings. In addition, the Project shall utilize transfer or spray equipment with high transfer efficiency. For example, a high volume, low pressure (HVLP) spray method coating application system operated at an air pressure between 0.1 and 10 pounds per square inch gauge (psig), with a 65 percent transfer efficiency. Manual transfer with brush or roller has 100 percent transfer efficiency.

32. The Project shall require the use of paints with VOC content of 10 g/L or lower.

33. Signage for the property shall be reviewed separately and is not part of the approval of this Project. Prior to any sign installation, the Applicant shall submit a Sign Permit Application to the Community Development Director for approval and a permit shall be issued by the Building Official. All proposed signage for the building shall be submitted to the City and processed pursuant to AVMC 15.34 standards and/or any applicable planned sign program affecting the property. No advertising devices shall be permitted on or off the project site visible to the public.

34. The facility shall operate at all times in a manner that will allow the quiet enjoyment of residents and tenants of surrounding properties. The Applicant shall institute whatever securing and operational measures are necessary to comply with this requirement. This shall include ensuring the operations do not generate negative impacts in regard to noise, odor, and views of the site.

35. In the event of adverse impacts on the health, safety, welfare, or living/working environments of the neighborhood or general public, or receipt of substantiated complaints directly related to the Applicant's operations, the Community Development Director shall investigate and, if significant adverse impacts directly related to the Applicant's business are found to exist, the Director or Chief of Police shall have the discretion to bring this Permit back to consider additional improvements and protective measures, additional conditions, amended conditions, or permit revocation. Modifications may include but not be limited to the restriction of operations that may include but not be limited to hours of operation.

36. Unless otherwise noted in this Resolution, all conditions of approval established in Resolution No. 2021-05 shall remain in effect and applicable to this Project.

Conditions Required Prior to the Issuance of a Building Permit

Building Department Conditions

37. Prior to issuance of a Building Permit, the Owner/Developer shall obtain all necessary and required approval of project plans from all City Departments, County of Orange, and all other applicable outside agencies.

38. Prior to issuance of a Building Permit, the Owner/Developer shall submit payment, or proof of payment prior to issuance of a building permit for that particular phase any and all applicable plan check, school, water, sewer, Transportation Corridor, and other public benefit fees, if not previously paid. Owner/Developer shall submit evidence of said payments.

39. Prior to issuance of a Building Permit, the Owner/Developer shall provide rough grade pad certification confirming the site has been graded in accordance with the approved grading plan.

40. Owner/Developer shall furnish, three (3) complete sets of plans (structural, mechanical, electrical, and plumbing). Said plans submitted shall contain two (2) copies of soil reports, liquefaction investigation reports and structural calculations.

41. The cover sheet of building construction documents shall contain a blue-line print of the City's Conditions of Approval and it shall be attached to each set of plans submitted for any construction or demolition or shall be printed on the title sheet verbatim.

42. Building addresses shall be located facing street fronting property for each building approved by the Building Department and OCFA.

43. All plans shall be designed in conformance with the 2019 editions of the California Building Code, California Plumbing Code, California Mechanical Code, California Electrical Code, and the Aliso Viejo Municipal Code.

Fire Department Conditions

44. Prior to the issuance of necessary building permits, the Applicant or responsible party shall submit the plan(s) listed below to the Orange County Fire Authority for review and approval

    a. Architectural (Service Codes PR200-PR285)

b. Hazardous materials compliance and chemical classification (Service Codes PR315-PR328)

c. Hazardous equipment, processes, or operations (Service Codes PR345-PR360)

d. High-piled storage (Service Code PR330)

e. Refrigeration and vapor detection/alarm system (Service Codes PR340 and PR500-PR520), if required by the Refrigeration Disclosure worksheet in OCFA guideline G-02 or the California Fire or Mechanical Codes

Police Services Department Conditions

45. Pursuant to Zoning Code Appendix A: Requirements for Crime Prevention Through Environmental Design (CPTED), buildings, open parking lots, walkways, and accesses in nonresidential complexes shall conform to the following lighting standards:

    a. All types of exterior doors shall be illuminated during the hours of darkness, with a minimum maintained 1 foot-candle of light, measured within a 5-foot radius on each side of the door at ground level. The light source shall be controlled by a photocell device or an uninterruptible A.C. power source.

    b. Recessed areas of buildings or fences, which have a minimum depth of 2 feet, a minimum height of 5 feet, and do not exceed 6 feet in width and are capable of human concealment, shall be illuminated with a minimum maintained 0.5 foot-candles of light at ground level during the hours of darkness. This requirement only applies to defined recessed areas which are within 6 feet of the edge of a designated walking surface with an unobstructed pathway to it that is not hindered by walls or hedge row landscaping a minimum of 2 feet in height. The light source may be motion detectors with a photocell device.

    c. Stairways shall be illuminated with a vandal resistant light fixture with a minimum maintained 1 foot-candle of light on all landings and/or stair treads, during the hours of operation and darkness. The interior service stairways shall be painted a light, highly reflective color.

    d. All interior or exterior corridors, passageways and walkways in any hotel, motel or inn shall be illuminated at all times with a minimum maintained 1 foot-candle of light on the walking surface.

    e. All exterior pedestrian walkways, interior common corridors, and open parking lots shall be illuminated with a minimum maintained 1 foot-candle of light on the walking or driving surface during the hours of operation and darkness.

f. The light source utilized to comply with this section shall have a rated average bulb life of not less than 10,000 hours.

g. Accessible luminaires utilized to meet the requirements of this section shall have vandal resistant light fixtures and be not less than 3 feet in height from ground level when used to illuminate walkways and a minimum of 8 feet in height from ground level when illuminating surfaces associated with vehicles. Light fixtures shall be deemed accessible if mounted within fifteen feet vertically or 6 feet horizontally from any accessible surface or any adjoining roof, balcony, landing, stair tread, platform or similar structure.

h. A site plan shall be provided showing buildings, parking area, walkways, detailed landscaping and a point-by-point photometric calculation of the required light levels. Foot-candles shall be measured on a horizontal plane and conform to a uniformity ratio of 4:1 average/minimum. Landscaping shall not be planted so as to obscure required light levels.

i. All lighting on the property shall be designed to prevent spillover onto neighboring properties.

46. Pursuant to Zoning Code Appendix A: Requirements for Crime Prevention Through Environmental Design (CPTED), to maintain sufficient illumination for security purposes, landscaping plans shall be designed so that trees and other landscaping do not obstruct light sources from outdoor fixtures, including parking lot lighting.

47. Pursuant to Zoning Code Appendix A: Requirements for Crime Prevention Through Environmental Design (CPTED), landscaping shall be designed so that trees and other landscaping do not obstruct views of traffic signs or address numerals on buildings.

Public Works Department Conditions

48. The Owner/Developer's Landscape Plan shall be prepared by a State licensed landscape architect and shall include all proposed and existing plant materials (location, type, size, and quantity), an irrigation plan, a grading plan, an approved site plan and a copy of the entitlement conditions of approval. The Owner/Developer shall post surety guaranteeing the construction of the improvements. The Plan shall be reviewed and approved by the Director of Public Works and the Community Development Director.

49. The Owner/Developer's Landscape Plan shall include elements to the extent practicable to protect existing and proposed pavements from root damages.

50. The Owner/Developer's Landscape Plan shall conform to the City's current Water Efficient Landscape Regulations at the time of submittal.

51. All graded slopes shall be permanently planted in a timely manner meeting the approval of the Director of Public Works and in compliance with the approved Landscape Plan with groundcover, trees and shrubs that will stabilize slopes and minimize erosion.

52. Pad certification by the Design Civil Engineer and Soil Engineer is required prior to commencing construction of any building foundation or structure.

Conditions Required Prior to Concealing Interior Construction

Fire Department Conditions

53. Prior to concealing interior construction, the Applicant or responsible party shall submit the plan(s) listed below to the Orange County Fire Authority for review and approval:

    a. Fire Alarm System (Service Code PR500-PR520)

    b. Fire Sprinkler System (Service Codes PR430-PR455), if the building is currently sprinklered and the system requires modification

Conditions Required Prior to Final Building Inspection or Occupancy Permit

Building Department Conditions

54. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall obtain final approval for all City departments and County agencies.
55. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall submit final compliance report from all independent deputy inspection firms involved in the project outlining each area of inspection.

56. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall submit a final compliance report from Structural Engineer of Record.

57. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall provide copies of all Title 24, Part 6 Certificate of Acceptance Forms including all lighting, electrical and mechanical.

Fire Department Conditions

58. Prior to issuance of temporary or final certificate of occupancy, all OCFA inspections shall be completed to the satisfaction of the OCFA inspector and be in substantial compliance with codes and standards applicable to the project and commensurate with the type of occupancy (temporary or final) requested. Inspections shall be

scheduled at least five days in advance by calling OCFA Inspection Scheduling at (714) 573-6150.

Planning Department Conditions

59. All temporary units, equipment, and fencing shall be removed from the site prior to final inspection for the final building construction project on site.

60. Prior to issuance of a Certificate of Occupancy, the Owner/Developer shall schedule an inspection by the Department of Planning Services to ensure the project was completed to the satisfaction of the Community Development Director and be in substantial compliance with codes and applicable standards.

Police Services Department Conditions

61. Prior to issuance of a Certificate of Occupancy, the Owner/Developer shall schedule an inspection by the Aliso Viejo Police Services Crime Prevention Specialist to confirm the implementation of CPTED standards and security hazards have been mitigated to the satisfaction of the Crime Prevention Specialist.

Public Works Department Conditions

62. Prior to issuance of a Certificate and Occupancy, the landscape architect shall provide written certification to the City stating installation is in substantial conformance with the approved landscape plans. If there are variations, the variations shall be approved by the Director of Public Works and Community Development Director.

63. Prior to issuance of a Certificate of Use and Occupancy, the Owner/Developer shall provide a written certification for the operation of all backflow devices.

ROBERT BUNYAN & ASSOCIATES
REAL ESTATE CONSULTANTS
ENTITLEMENTS PERMITTING DEVELOPMENT

RECEIVED
JUN 24 2021
PLANNING DEPARTMENT

June 24, 2021

Omar Dadabhoy
City of Aliso Viejo
12 Journey
Aliso Viejo, CA 92656

Re: Webb's Grainworks Changed Plan

Dear Mr. Dadabhoy:

Webb's Grainworks received city council approval on January 20, 2021 for Planning Application PA 18-020, an application for a Conditional Use Permit to establish a distillery, microbrewery, and tasting room; an Administrative Use Permit to operate with a Type 6, 23 and 74 licenses from the Department of Alcohol Beverage Control; and an Administrative Use Permit for manufacturing of alcoholic beverages from the property at 7 Journey, Aliso Viejo.

Following that approval, Webb's Grainworks began preparation of detailed plans for interior improvements and improvements to the exterior parking lot and building. As a result of the introduction of a train caboose car into the building, resulting in additional building construction, as well as other changes to the interior and exterior of the building, and parking lot area, Webb's Grainworks is resubmitting plans under an application for a Site Development Permit, per Section 15.74.020 of the City Municipal Code. The following is a summary of the significant changes:

Interior Changes:

1. Introduction of a train caboose car into the dining room area against, and replacing, a portion of the building wall. The use of this caboose is intended to support the charismatic Prohibition Era theme of the project, providing a unique customer experience. The caboose adds 39 square feet of new restaurant space and 17 square feet of new storage space. This new space has been offset by a redesigned entry that removes 68 square feet from the building's total square footage. (See Table A -). The design provides for 10 modular seating arrangements that replace seats previously facing the building wall, and are now visible from the dining area through hinged swinging windows built into the side of the caboose. Accessibility is provided by a code-compliant lift connected to the new code-compliant landing and stairs at the end of the caboose.

2. One enclosed office has been revised to become a storage area resulting in 273 square feet of change.

3. The production area still and brite tanks have been rearranged for more efficient service and maintenance.

24008 SKYLINE • MISSION VIEJO, CA 92692
TEL. : (949) 697-7933 • e-mail : rbunyan4@cox.net

4. The location of racks and freezers have been rearranged in the dry storage area for more efficient service and maintenance.

5. The first floor area has been reduced from 18,518 square feet to 18,506 square feet by redesigning the front entry. (See Sheet PK-1).

Exterior Changes:

1. Introduction of the train caboose car into the dining area results in one side of the car being exposed to the exterior. The proposed changes to the Webb's Grainworks plans are the result of evaluation and feedback from our architects, civil engineer, CASp consultant, brewery and kitchen consultants. Each change is designed to make the project perform more efficiently, more environmentally friendly and compliant with public codes and regulations. The introduction of the caboose element is intended to create a unique locational identity for Webb's Grainworks, providing a landmark destination for customers both in Aliso Viejo and surrounding communities. Jeremy Webb and the design team, all versed in craft brewery projects, believe that the caboose makes the venue truly special and exciting, establishing curb appeal and creating an interesting layer to the customer's overall experience. It is one element of marketing that can identify the Webb's Grainworks brand, e.g. Red Caboose Ale, Grain Train Whiskey, Komboosa, etc.

2. Relocation and redesign of the entry to the south at the recessed middle portion of the building provides a more efficient ingress/egress and is necessary to accommodate the caboose car. This change allows the elimination of the existing low wall and iron fence separating the entry sidewalk from the parking lot. The new entry is also closer to accessible parking spaces.

3. The accessible parking spaces facing the building have been shifted slightly south and the accessible route has been realigned to accommodate grade levels. A new accessible ramp from the accessible space facing the street is proposed to connect to the sidewalk allowing access directly to the front entry of the building.

4. New landscaping is planned around the building. Existing eucalyptus and liquid amber trees are proposed to be removed and the planter beds would receive new shrub and ground cover materials using the city's plant palette. The existing trees have outgrown the planter bed spaces, causing buckling of curbs and driveways. The trees also interfere with illumination from building lamps, resulting in more dimly lit areas of the parking lot. Association-maintained slope landscaping deficiencies are being addressed directly by the Pacific Park II Association through PCM Management. They have indicated that they are working directly with the city to remedy the dead areas identified in our Webb's Grainworks submission and addressed as Condition of Approval #32.

5. The existing trash enclosure is being refurbished to include a cover and a drain connection to the sanitary sewer. One parking space may be converted to increase the enclosure area, making it more efficient for trash pickup, as well as increasing capacity. (Revised parking calculations indicate that 66 spaces are now required per code, not 68. See Table A. Coordination on a waste management plan is being conducted with Craig Dibley at CR&R.

6. New paint is being proposed to refresh the exterior of the building and rebrand the business from Lew Webb's Classic Cars to Webb's Grainworks. The exterior street elevation paint scheme distinctly identifies Webb's Grainworks as the unique use that it is. This is accomplished with the presence of the caboose, distinctive glass windows, canopies and the surrounding grey tone paint and contrast band. The tie-in element is the continuation of the parapet color band over Webb's Grainworks and the warehouse section of the 7 Journey building on the south side. We believe this differentiation is aesthetically compatible and acceptable for a craft brewery in any business park as such differentiation is considered standard nomenclature within the industry.

7. New signage is proposed for the front of the building. A sign program is being prepared and would be submitted to the city for review and approval prior to our application for a building permit.

Parking Tabulation:
The changes proposed for Webb's Grainworks will decrease the amount of parking required. The parking use and tabulation table is as follows:

Table A – PARKING TABULATION

BUILDING	LAND USE	S.F.	PARKING CODE	PARKING REQUIRED
Brewery	Microbrewery	3,615	1/80 s.f. GFA	45.2
	General Light Industrial	822	1/400 s.f. GFA	2.0
	Storage	4,794	1/1000 s.f. or 1	4.8
			per employee*	
	General Office Use	912	1/250 s.f. GFA	3.6
	Retail Sales	420	1/200 s.f. GFA	2.1
	Subtotal Brewery	10,563		56.6
Storage	Personal Storage	9,808	1/1000 s.f. or 1	9.8
			per employee*	
	*Whichever is greater			
	Total Building	20,371	Total Parking Required	66.4
			Total Parking Provided	68

Revised parking calculations indicate that required parking is now 66 spaces instead of 68. Current plans are to lose one space next to the trash enclosure for redesign and expansion of that enclosure. Plans are being discussed for eliminating the parking space nearest Journey at the north entry drive.

The purpose of a site development permit is to ensure that new development conforms to the development and design provisions of the City Zoning Code, including but not limited to permitted uses,

development standards, and supplemental regulations. The site development permit approves architectural, landscape, lighting and related development plans. Justification for the approval of this application is as follows:

1. Consistency with General Plan: This project is consistent with the General Plan, specifically LU-1 that promotes a diverse mix of land uses to meet the future needs of all residents and the business community. Policy LU-1.2 adds to this by seeking to attract a broad range of retail, medical and office uses providing employment at all income levels and making a positive contribution to the City's tax base.

2. Consistency with Zoning Code: The project is compliant with all zoning codes, including parking, accessibility, fire and CPTED safety regulations.

3. Compliance with CEQA: The project is in compliance with the requirements of the California Environmental Quality Act by its categorically exemption.

4. Architectural Design: The project's style, scale, building materials, colors and architectural details are intended to introduce a design that is complementary to surrounding business park development, yet is intentionally and tastefully differentiated for its role as a microbrewery and restaurant serving not only the local businesses, but the community as a whole.

5. Site Design: The project has been designed to conform and be compatible with surrounding development in its site entries, interior circulation, pedestrian and bicycle access, pedestrian amenities, screening, exterior lighting and intended signage.

6. Landscape Design: Landscaping has been designed to provide an overall unifying theme and enhance the visual continuity and compatibility of the project. Specific plant materials have been designated to upgrade landscaping adjacent to the building and to areas of the parking lot that will be regraded or repaired. At the request of the City the Pacific Park II Association has been notified of Association-maintained slope disrepair and is working with the City to make necessary landscape improvements.

This application includes 10 half-size copies of Webb's Grainworks plan sets, one 11"x17" set and an electronic file is being forwarded to you by the architect, Hattox Design Group. Also included with this application are the following items:

- Form PS-200A – Application Request and Signature Page
- Form PS-205 – Environmental Impact Assessment
- Form FS-100 – Deposit Account/Financial Disclosure
- Form PS-240 – Zoning Compliance Application for Plan Review
- Orange County Fire Authority Plan Submittal Criteria
- Orange County Fire Authority Service Request #281038
- Webb's Grainworks Check #1119 in the amount of $5,000.00 for Plan Check

Upon your confirmation, we will order the public notification package from Susan Case, Inc., which can be provided within 5 working days.

Thank you for your assistance and we look forward to your review and feedback.

Regards,

Bob Bunyan

Attachments

xc: Jeremy Webb
Liz Hattox

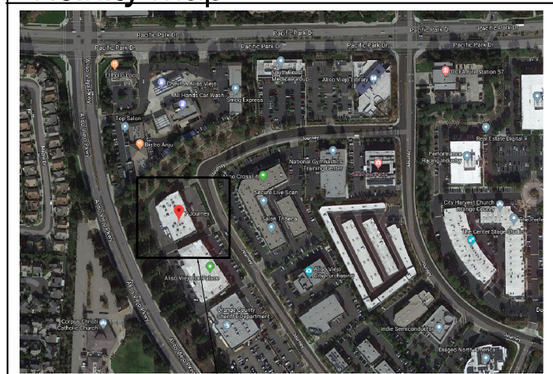
WEBB'S
GRAINWORKS
7 JOURNEY
ALISO VIEJO,
CA 92656

Rendering



SIGNAGE IS CONCEPTUAL ONLY AND MAY BE CHANGED TO MEET SIGN PROGRAM REQUIREMENTS.

Vicinity Map



Scope of Work

WEBB'S GRAINWORKS RECEIVED CITY COUNCIL APPROVAL ON JANUARY 21, 2021 FOR PA 2021-034, AN APPLICATION TO ESTABLISH A CRAFT BREWERY, RESTAURANT AND DISTILLERY AT 7 JOURNEY, ALISO VIEJO. FOLLOWING THAT APPROVAL, WEBB'S GRAINWORKS HAS PROCEEDED WITH DETAILED PLANS FOR THE INTERIOR IMPROVEMENTS AND IMPROVEMENTS TO THE EXTERIOR PARKING LOT AND BUILDING. THESE PLANS REPRESENT CHANGES TO THE ORIGINALLY APPROVED PLANS AND ARE BEING SUBMITTED FOR CITY REVIEW AND APPROVAL PRIOR TO STARTING CONSTRUCTION DRAWINGS.

INTRODUCTION OF A TRAIN CABOOSE CAR INTO THE DINING ROOM AREA AGAINST, AND REPLACING, A PORTION OF THE BUILDING WALL. THE ADDITION OF THIS TRAIN CABOOSE HAS AFFECTED THE EXTERIOR AESTHETIC, THE PARKING, AND THE SPACE PLAN.

Project Data

2019 CALIFORNIA ADMINISTRATIVE CODE - TITLE 24, PART 1
2019 CALIFORNIA BUILDING CODE - TITLE 24, PART 2,
WITH APPENDIX C, F, G, H, I, J
2019 CALIFORNIA ELECTRICAL CODE - TITLE 24, PART 3
2019 CALIFORNIA MECHANICAL CODE - TITLE 24, PART 4
2019 CALIFORNIA PLUMBING CODE - TITLE 24, PART 5
2019 CALIFORNIA ENERGY CODE - TITLE 24, PART 6
2019 CALIFORNIA FIRE CODE - TITLE 24, PART 9
2019 CALIFORNIA EXISTING BUILDING CODE - TITLE 24, PART 10
2019 CALIFORNIA REFERENCED STANDARDS - TITLE 24, PART 12
2019 ENERGY EFFICIENCY STANDARDS

CONSTRUCTION TYPE: V-A
FULLY SPRINKLERED PER 903.3.1.1
NO. OF STORIES: 2

PLANNER:

HATTOX DESIGN GROUP, LLC
LIZ HATTOX
3195-C, STUDIO TWO, AIRPORT LOOP DR.
COSTA MESA, CA 92626
P: 949-399-1112

Sheet Index

A0.0	COVER SHEET
RN-1	ELEVATION RENDERING
ST-0	EXISTING SITE PLAN
ST-1	PROPOSED SITE PLAN
ST-2	SITE PLAN DETAILS
PH-1	PHOTOMETRIC
PK-1	PARKING CALCULATION & SPACE PLAN
A8.1	ELEVATION OF EXTERIOR
A8.2	ELEVATION FOR PROPOSED PAINT LOCATIONS
LC-01	LANDSCAPE PLAN
LC-02	LANDSCAPE PLAN
LC-03	LANDSCAPE PLAN

CONTRACTOR TO VERIFY SITE CONDITIONS PRIOR TO PRICING.
NOTE:
CONTRACTOR SHALL BE RESPONSIBLE FOR VERIFYING ALL EXISTING FIELD CONDITIONS. CONTRACTOR WILL NOTIFY HATTOX DESIGN GROUP, LLC IMMEDIATELY AS TO ANY DISCREPANCIES BETWEEN FIELD CONDITIONS AND WORKING DRAWINGS.

THESE DRAWINGS AND SPECIFICATIONS ARE THE PROPERTY AND COPYRIGHT OF HATTOX DESIGN GROUP, LLC AND SHALL NOT BE USED ON ANY OTHER WORK EXCEPT BY AGREEMENT WITH HATTOX DESIGN GROUP, LLC. WRITTEN DIMENSIONS SHALL TAKE PREFERENCE OVER SCALED DIMENSIONS AND SHALL BE VERIFIED ON THE JOB SITE. ANY DISCREPANCY SHALL BE BROUGHT TO THE NOTICE OF HATTOX DESIGN GROUP PRIOR TO THE COMMENCEMENT OF ANY WORK.

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CALIFORNIA COUNCIL FOR INTERIOR DESIGN CERTIFICATION
CCIDC
ELIZABETH A. HATTOX
CERTIFIED INTERIOR DESIGNER
COMMERCIAL
5846 EXPIRES 12-07-21

A CERTIFIED INTERIOR DESIGNER IS A COMPETENT DESIGN PROFESSIONAL WHO MAY PREPARE AND SUBMIT NON-STRUCTURAL, NON-SEISMIC CONSTRUCTION DOCUMENTS, AND SPECIFICATIONS TO LOCAL BUILDING DEPARTMENTS FOR THE PURPOSES OF PLAN CHECK.

BUT CODE SECTION 5805 AND DEPARTMENT OF CONSUMER AFFAIRS CALIFORNIA ARCHITECTS BOARD SECTION 1005

A CERTIFIED INTERIOR DESIGNER MAY PREPARE AND SUBMIT TYPE 5 NON-STRUCTURAL AND NON-SEISMIC INTERIOR SPACES CONSISTENT WITH SECTION 5805 AND SECTION 1005. THEY MAY ENGAGE IN THE PRELIMINARY, PLANNING, DESIGNING AND DOCUMENTING THE CONSTRUCTION AND INSTALLATION OF NON-STRUCTURAL OR NON-SEISMIC INTERIOR ELEMENTS WITHIN THE INTERIOR OF A BUILDING. "NON-STRUCTURAL" MEANS INTERIOR ELEMENTS THAT ARE NON-LOAD BEARING. "NON-SEISMIC" MEANS INTERIOR ELEMENTS THAT DO NOT REQUIRE SEISMIC RESISTANCE AS DETERMINED BY THE BUILDING CODE. NON-STRUCTURAL, NON-SEISMIC DESIGN MAY INCLUDE, BUT IS NOT LIMITED TO, INTERIOR ALTERED COMPONENTS SUCH AS PARTITIONS, CEILINGS AND FURNITURE SYSTEMS AS THESE COMPONENTS ARE DEFINED IN THE CALIFORNIA BUILDING CODE (CBC), AND ARE CONSTRUCTED IN ACCORDANCE WITH PRESCRIPTIVE REQUIREMENTS OF THE CBC AND ARE DESIGNED IN ACCORDANCE WITH ACCEPTED STANDARDS OF NON-STRUCTURAL, NON-SEISMIC DESIGN PRACTICE. THESE ELEMENTS INCLUDE, BUT ARE NOT LIMITED TO, NON-LOAD BEARING PARTITIONS, SUSPENDED CEILING SYSTEMS, MILLWORK, CASEWORK, AND FURNITURE SYSTEMS. THESE COMPONENTS SHALL BE CONSTRUCTED IN ACCORDANCE WITH COMMONLY ACCEPTED STANDARDS OF NON-STRUCTURAL, NON-SEISMIC DESIGN PRACTICE AND ARE DESIGNED IN ACCORDANCE WITH ACCEPTED STANDARDS OF NON-STRUCTURAL, NON-SEISMIC DESIGN PRACTICE. THESE ELEMENTS INCLUDE, BUT ARE NOT LIMITED TO, NON-LOAD BEARING PARTITIONS, SUSPENDED CEILING SYSTEMS, MILLWORK, CASEWORK, AND FURNITURE SYSTEMS. THESE COMPONENTS SHALL BE CONSTRUCTED IN ACCORDANCE WITH COMMONLY ACCEPTED STANDARDS OF NON-STRUCTURAL, NON-SEISMIC DESIGN PRACTICE AND ARE DESIGNED IN ACCORDANCE WITH ACCEPTED STANDARDS OF NON-STRUCTURAL, NON-SEISMIC DESIGN PRACTICE.

AGREED:
ACCEPTED THIS DAY OF , 2021
TENANT:
BY:
TITLE:
EXCEPTIONS:

UPON SIGNING THIS DRAWING ALL OF MY REQUIREMENTS HAVE BEEN ADDRESSED AND I HAVE FULL AUTHORITY TO BIND MY ORGANIZATION TO THIS PLAN. ANY CHANGES TO THIS PLAN AFTER THIS DATE WILL BE AN ADDITIONAL DESIGN/CONSTRUCTION COST TO ME THE TENANT.

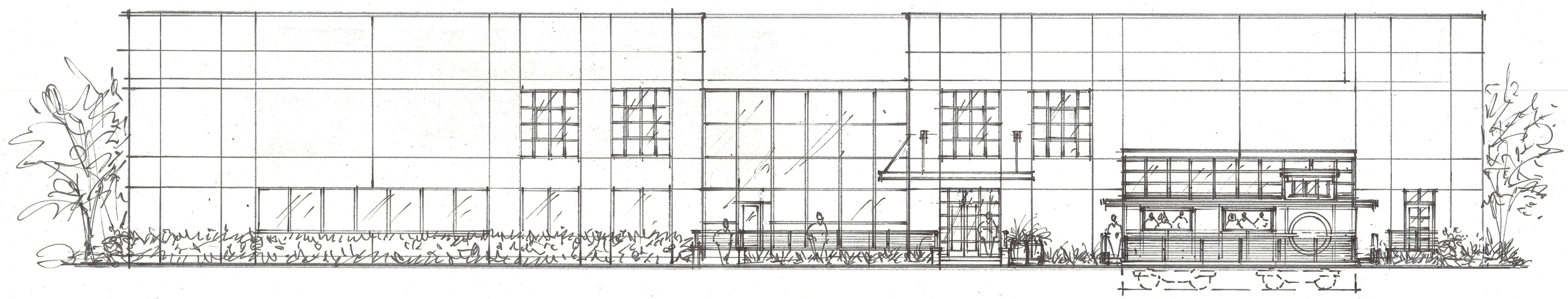
WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS
10/05/21	SUBMIT TO PLANNING

PA / PM:	LH
DRAWN BY:	HA
SQ. FTG.	
JOB NO.:	18-105-08

SHEET
COVER SHEET & GENERAL NOTES
A0.0

Rendering





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CALIFORNIA COUNCIL FOR INTERIOR DESIGN CERTIFICATION
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A CERTIFIED INTERIOR DESIGNER IS A COMPETENT DESIGN PROFESSIONAL WHO MAY PREPARE AND SUBMIT NON-STRUCTURAL, NON-SEISMIC CONSTRUCTION DOCUMENTS AND SPECIFICATIONS TO LOCAL BUILDING DEPARTMENTS FOR THE PURPOSES OF PLAN CHECK.

B&P CODE SECTION 5800 AND DEPARTMENT OF CONSUMER AFFAIRS CALIFORNIA ARCHITECTS BOARD SECTION 5538:
A CERTIFIED INTERIOR DESIGNER MAY DESIGN ANY TYPE OF NON-STRUCTURAL OR NON-SEISMIC INTERIOR SPACES CONSISTENT WITH SECTION 5800 AND SECTION 5538. THEY MAY ENGAGE IN THE PROGRAMMING, PLANNING, DESIGNING AND DOCUMENTING THE CONSTRUCTION AND INSTALLATION OF NON-STRUCTURAL OR NON-SEISMIC ELEMENTS, WITHIN THE INTERIOR SPACES OF A BUILDING. "NON-STRUCTURAL" MEANS INTERIOR ELEMENTS THAT ARE NON-LOAD BEARING. "NON-SEISMIC" MEANS INTERIOR ELEMENTS THAT DO NOT ASSIST IN THE SEISMIC BRACING OF A BUILDING'S STRUCTURAL SYSTEM. COMMON NON-STRUCTURAL ITEMS INCLUDE CEILING AND PARTITION SYSTEMS AS THESE COMPONENTS EMPLOY NORMAL AND TYPICAL BRACING CONVENTIONS AND DO NOT ASSIST IN THE STRUCTURAL INTEGRITY OF A BUILDING.

AGREED:
ACCEPTED THIS DAY OF , 2021
TENANT: ______
BY: ______
TITLE: ______
EXCEPTIONS: ______

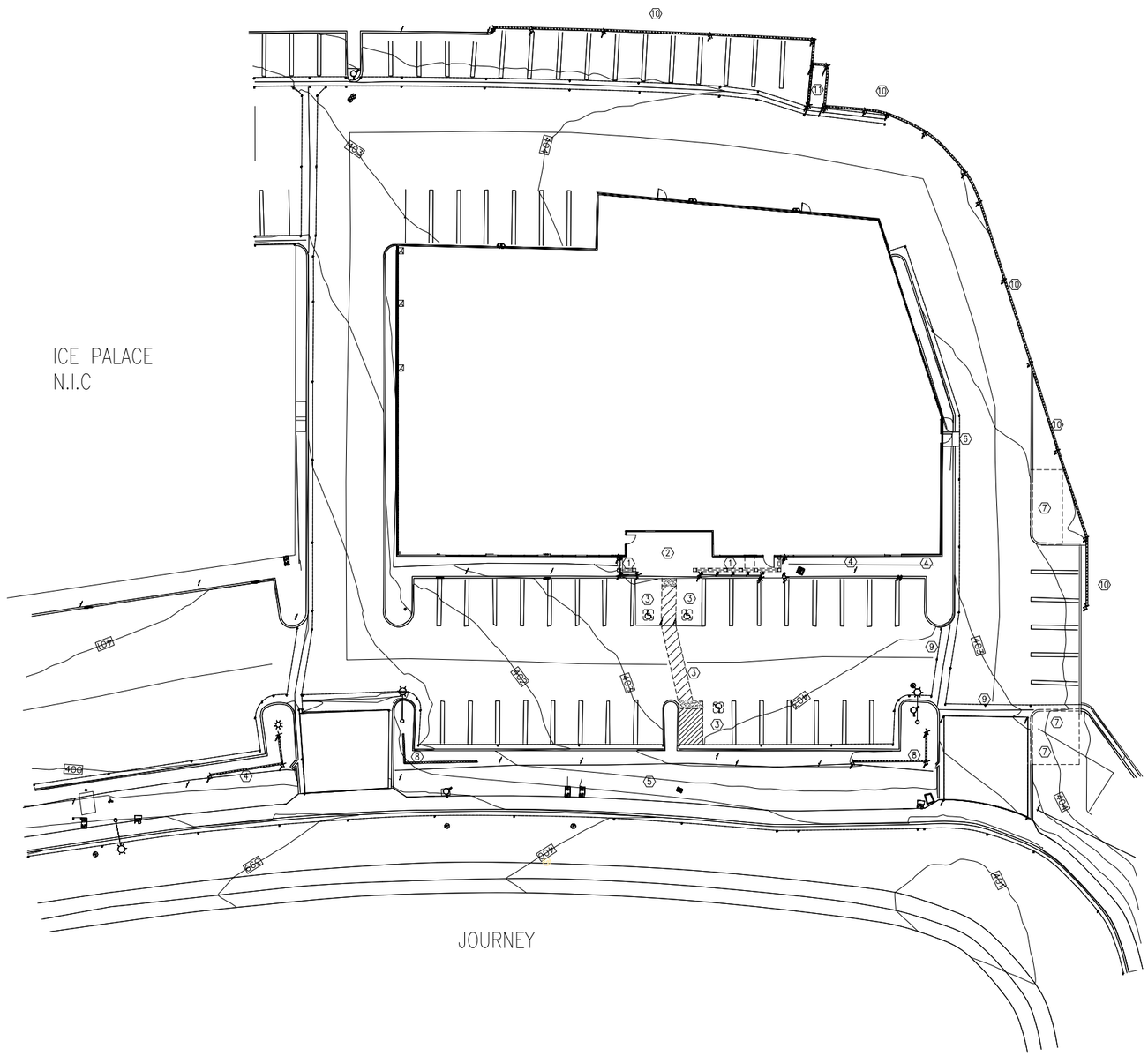
UPON SIGNING THIS DRAWING ALL OF MY REQUIREMENTS HAVE BEEN ADDRESSED AND I HAVE FULL AUTHORITY TO BIND MY ORGANIZATION TO THIS PLAN. ANY CHANGES TO THIS PLAN AFTER THIS DATE WILL BE AN ADDITIONAL DESIGN/CONSTRUCTION COST TO ME THE TENANT.

WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS	DATE	REMARKS

PA / PM:	LH
DRAWN BY:	HA
SQ. FTG.	
JOB NO.:	18–105–08

SHEET
ELEVATION RENDERING
RN-1



EXISTING SITE PLAN
ENGINEERING SCALE 1"=20'

NORTH

CONTRACTOR TO VERIFY SITE CONDITIONS PRIOR TO PRICING.
CONTRACTOR SHALL BE RESPONSIBLE FOR VERIFYING ALL EXISTING FIELD CONDITIONS. CONTRACTOR WILL NOTIFY HATTOX DESIGN GROUP, LLC IMMEDIATELY AS TO ANY DISCREPANCIES BETWEEN FIELD CONDITIONS AND WORKING DRAWINGS.

EXISTING PLAN KEYNOTES:

1. G.C. TO DEMOLISH EXISTING RAMP, CONCRETE POSTS, AND RAILINGS AT ENTRY. SEE ST-1 FOR PROPOSED LAYOUT WITH ENTRY REDESIGN.
2. G.C. TO DEMOLISH EXISTING ENTRY PATIO CONCRETE FOR NEW ENTRY DESIGN.
3. G.C. TO DEMOLISH EXISTING ACCESSIBLE PARKING AND EXISTING STRIPED PATH OF TRAVEL. SEE ST-1 FOR PROPOSED LAYOUT.
4. G.C. TO DEMOLISH EXISTING LANDSCAPE FOR NEW CABOOSE LOCATION AND EXIT DOOR.
5. G.C. TO DEMOLISH SECTION OF LANDSCAPING FOR NEW ACCESSIBLE PATH OF TRAVEL FROM STREET. SEE ST-1 FOR LOCATION AND LANDSCAPE SHEETS FOR LANDSCAPE DETAILS.
6. G.C. TO DEMOLISH EXISTING KITCHEN RAMP. SEE LANDSCAPE SHEETS FOR PLANTING INFILL DETAILS.
7. G.C. TO DEMOLISH EXISTING LANDSCAPING FOR NEW STANDARD PARKING STALLS REQUIRED BY CITY FROM PREVIOUSLY APPROVED C.U.P.
8. EXISTING LOW WALLS ARE EXISTING TO REMAIN.
9. EXISTING SWALE IS EXISTING TO REMAIN.
10. EXISTING RETAINING WALLS ARE EXISTING TO REMAIN.
11. G.C. TO CONSTRUCT NEW ROOF OVER EXISTING TRASH ENCLOSURE.

SEE CIVIL ENGINEERING AND LANDSCAPE PLANS FOR DETAILS OF SITE IMPROVEMENT. ARCHITECTURAL SHEETS SHOW ACCESSIBLE DETAILS.

HATTOX | DesignGroup inc
7246 Bed Hill Avenue, Studio B | Irvine, California | 92614
p 949.559.1112 | f 949.559.1113 | w www.hattoxdesign.com

CALIFORNIA COUNCIL FOR INTERIOR DESIGN CERTIFICATION
CCIDC
ELIZABETH A. HATTOX
CERTIFIED INTERIOR DESIGNER
NO. INTERIOR DESIGNER
5846 EXPIRES 12-07-21
CALIFORNIA COUNCIL FOR INTERIOR DESIGN CERTIFICATION

A CERTIFIED INTERIOR DESIGNER IS A COMPETENT DESIGN PROFESSIONAL WHO MAY PREPARE AND SUBMIT NON-STRUCTURAL, NON-SEISMIC CONSTRUCTION DOCUMENTS AND PROCEDURES TO LOCAL BUILDING DEPARTMENTS FOR THE PURPOSES OF PLAN CHECK.

B&P CODE SECTION 5800 AND DEPARTMENT OF CONSUMER AFFAIRS CALIFORNIA ARCHITECTS BOARD (CAB) CODE SECTION 5537 STATES THAT A PERSON MAY PREPARE, SIGN OR STAMP TYPE OF NON-STRUCTURAL OR NON-SEISMIC INTERIOR SPACES CONSISTENT WITH SECTION 5800 AND SECTION 5538. THEY MAY ENGAGE IN THE PROGRAMMING, PLANNING, DESIGNING, AND DOCUMENTING THE CONSTRUCTION AND INSTALLATION OF NON-LOAD BEARING, NON-SEISMIC INTERIOR ELEMENTS WITHIN THE SPACE OF A BUILDING. "NON-STRUCTURAL" MEANS INTERIOR ELEMENTS THAT ARE NON-LOAD BEARING. "NON-SEISMIC" MEANS INTERIOR ELEMENTS THAT DO NOT AFFECT THE STRUCTURAL SYSTEM OF THE BUILDING. "NON-STRUCTURAL" ALSO INCLUDES ELEMENTS THAT ARE ATTACHED TO, BUT NOT A PART OF, THE BUILDING'S STRUCTURAL SYSTEM. "NON-STRUCTURAL" ALSO INCLUDES ELEMENTS THAT ARE ATTACHED TO THE BUILDING'S STRUCTURAL SYSTEM BUT ARE NOT PART OF THE BUILDING'S STRUCTURAL SYSTEM AS THESE COMPONENTS EMPLOY NORMAL AND TYPICAL BRACING CONVENTIONS AND DO NOT ASSIST IN THE STRUCTURAL INTEGRITY OF A BUILDING.

AGREED:
ACCEPTED THIS DAY OF , 2021
TENANT:
BY:
TITLE:
EXCEPTIONS:

UPON SIGNING THIS DRAWING ALL OF MY REQUIREMENTS HAVE BEEN ADDRESSED AND I HAVE FULL AUTHORITY TO BIND MY ORGANIZATION TO THIS PLAN. ANY CHANGES TO THIS PLAN AFTER THIS DATE WILL BE AN ADDITIONAL DESIGN/CONSTRUCTION COST TO ME THE TENANT.

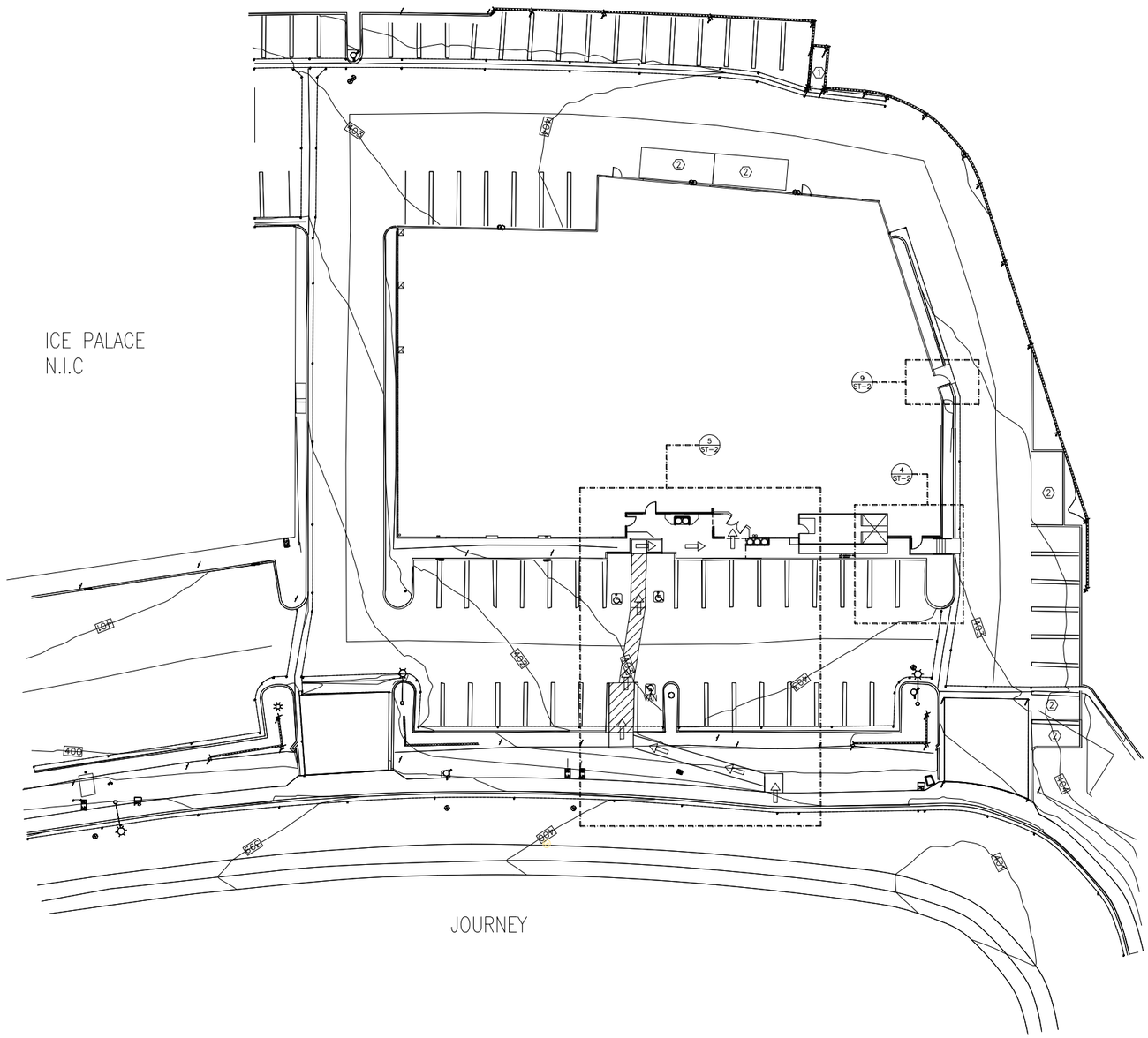
WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS

PA / PM:	LH
DRAWN BY:	HA
SQ. FTG.	9,803.SF
JOB NO.:	18-105-09

SHEET
EXISTING SITE PLAN
ST-0

USE OF DRAWING AND SPECIFICATIONS ARE THE PROPERTY AND COPYRIGHT OF HATTOX DESIGN GROUP, LLC AND SHALL NOT BE USED ON ANY OTHER WORK EXCEPT BY AGREEMENT WITH HATTOX DESIGN GROUP, LLC. WRITTEN DIMENSIONS SHALL TAKE PREFERENCE OVER SCALED DIMENSIONS AND SHALL BE VERIFIED ON THE JOB SITE. ANY DISCREPANCY SHALL BE BROUGHT TO THE NOTICE OF HATTOX DESIGN GROUP PRIOR TO THE COMMENCEMENT OF ANY WORK.



PROPOSED SITE PLAN
ENGINEERING SCALE 1"=20'

NORTH

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PROPOSED PLAN KEYNOTES:

1. G.C. TO PROVIDE AND INSTALL NEW ROOF AT EXISTING TRASH ENCLOSURE.
2. G.C. TO REMOVE LANDSCAPING AS REQUIRED AND STRIPE OUT NEW STANDARD PARKING STALLS PER C.U.P.

SEE SHEET ST-2 FOR ENLARGEMENTS.

HATTOX | DesignGroup inc
3728 Bee Hill Avenue, Studio B | Irvine, California | 92614
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CCIDC
ELIZABETH A. HATTOX
CERTIFIED INTERIOR DESIGNER
CERTIFICATE NO.:
5846 EXPIRES 12-07-21

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BAP CODE SECTION 5800 AND DEPARTMENT OF CONSUMER AFFAIRS REGULATIONS SECTION 3150 DEFINE THE SCOPE OF A CERTIFIED INTERIOR DESIGNER AS ANY DESIGN ANY TYPE OF NON-STRUCTURAL OR NON-SEISMIC INTERIOR SPACES CONSISTENT WITH SECTION 5800 AND SECTION 5538. THEY HAVE SPECIALIZED IN THE PROGRAMMING, PLANNING, DESIGNING AND COORDINATING THE CONSTRUCTION AND INSTALLATION OF NON-LOAD BEARING, NON-SEISMIC INTERIOR ELEMENTS WITHIN AN INTERIOR OF A BUILDING. NON-STRUCTURAL MEANS INTERIOR ELEMENTS THAT ARE NON-LOAD BEARING. "NON-SEISMIC" MEANS INTERIOR ELEMENTS THAT DO NOT REQUIRE SEISMIC ANALYSIS OF THE BUILDING STRUCTURE. NON-STRUCTURAL OR NON-SEISMIC BUILDING ELEMENTS AND PARTITIONS INCLUDE SYSTEMS AS THESE COMPONENTS EMPLOY NORMAL AND TYPICAL BRACING CONVENTIONS AND DO NOT ADD TO THE STRUCTURAL INTEGRITY OF A BUILDING.

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WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS	DATE	REMARKS

PA / PM:	LH
DRAWN BY:	HA
SQ. FTG.	9,803.SF
JOB NO.:	18-105-09

SHEET
PROPOSED SITE PLAN
ST-1

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GENERAL NOTES FOR DOORS:

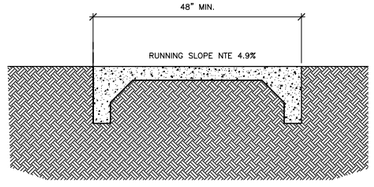
--PROVIDE A 60" X 60 LEVEL MANEUVERING CLEARANCE. CLEARANCE TO BE MINIMUM OF 18" (24" FOR EXTERIOR) BEYOND THE LATCH ON THE PULL SIDE OF THE DOOR AND MINIMUM OF 60" PERPENDICULAR FROM THE FACE OF THE DOOR.

--PROVIDE A 48" X 48" LEVEL MANEUVERING CLEARANCE. MINIMUM OF 12" BEYOND THE LATCH ON THE PULL SIDE OF THE DOOR AND MINIMUM OF 48" PERPENDICULAR FROM THE FACE OF THE DOOR.

The review of these document comprises our professional opinion/recommendation related to the specific Federal and California accessibility requirements that apply to the subject property. Because of site constraints accessibility is provided to the "maximum extent feasible". This review does not consider as-built or existing conditions. 10/7/21
Paul Martin CASp # 482

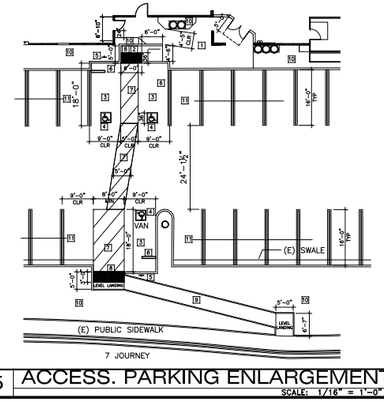
Paul Martin

20 TYP. DOOR NOTES
SECRAMP SCALE: NOT TO SCALE

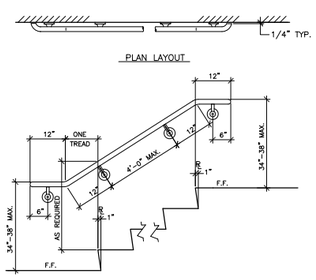


15 SECTION @ SLOPING SIDEWALK
SECRAMP SCALE: NOT TO SCALE

KEYNOTES
1. G.C. TO POUR NEW PATIO CONCRETE AT ENTRY. SEE DETAIL 8/-- FOR CONCRETE DETAIL. SEE LANDSCAPE PLANS FOR DESIGN OF CONCRETE AND INSET LANDSCAPE.
2. NEW ACCESSIBLE RAMP AT ACCESSIBLE STALLS. RAMP NTE 7.9% IN DIRECTION OF TRAVEL OR 2% CROSS SLOPE. RAMP TO BE NO LONGER THAN 6'--0" IN LENGTH. LEVEL LANDINGS AT RAMP NTE 2% SLOPE IN ANY DIRECTION. WHEELGUIDES REQUIRED. SEE DETAIL 18/--.
3. G.C. TO STRIPE NEW ACCESSIBLE STALLS AT NEW LOCATIONS. ACCESSIBLE STALLS NTE 2% IN ANY DIRECTION. SEE DETAIL 6/--.
4. G.C. TO PAINT NEW ACCESSIBLE SYMBOL AT ALL ACCESSIBLE STALLS. SEE DETAIL 16/--.
5. G.C. TO PROVIDE AND INSTALL NEW ACCESSIBLE SIGNAGE AT ACCESSIBLE STALLS. SEE DETAILS 13/- AND 7/--.
6. G.C. TO PROVIDE AND INSTALL NEW WHEELSTOPS AT ACCESSIBLE STALLS. SEE DETAIL 17/--.
7. G.C. TO STRIPE OUT NEW ACCESSIBLE AISLE. SLOPE NTE 4.9% IN DIRECTION OF TRAVEL OR 2% CROSS SLOPE. SEE DETAIL 6/--.
8. G.C. TO PROVIDE AND INSTALL NEW TRUNCATED DOMES. SEE DETAIL 1/--.
9. NEW PATH OF TRAVEL SLOPING SIDEWALK FROM STREET NTE 2% CROSS SLOPE OR 4.8% SLOPE IN DIRECTION OF TRAVEL. LEVEL LANDINGS AT SLOPING SIDEWALK NTE 2% IN ANY DIRECTION. SEE DETAIL 15/--.
10. NEW LANDSCAPE, SEE LANDSCAPE PLANS FOR DETAILS.
11. STANDARD STALLS TO REMAIN.
12. G.C. TO PROVIDE AND INSTALL ACCESSIBLE ENTRANCE SIGNAGE AT FRONT ENTRY. SEE DETAIL 2/--.
13. G.C. TO PROVIDE AND INSTALL WARNING SIGN IF SIGN IS NOT EXISTING ON PROPERTY. SEE DETAIL 12/--.
14. SEE GENERAL NOTES FOR DOORS. SEE DETAIL 20/--.

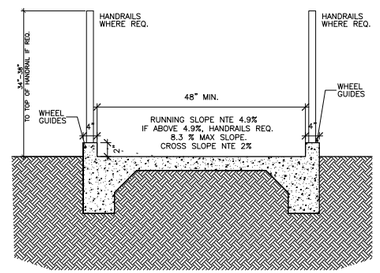


5 ACCESS. PARKING ENLARGEMENT
SCALE: 1/16" = 1'-0"



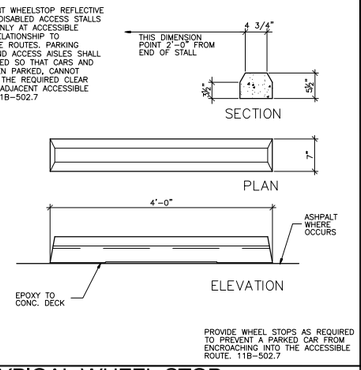
12" PLUS ONE TREAD AT STAIRS, 12" ONLY AT RAMP.

19 TYP HANDRAIL SECTION
SECRAMP SCALE: NOT TO SCALE



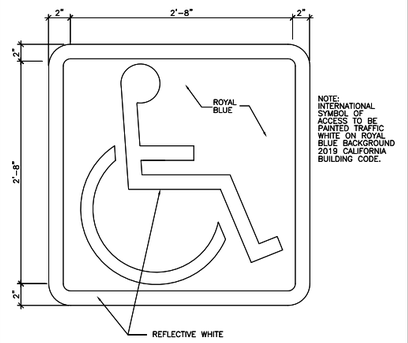
18 SECTION @ RAMP
SECRAMP SCALE: NOT TO SCALE

NOTE: PAINT WHEELSTOP REFLECTIVE WHITE AT DISABLED ACCESS STALLS PROVIDE ONLY AT ACCESSIBLE STALLS. RELATIONSHIP TO ACCESSIBLE ROUTES. PARKING SPACES AND ACCESS AISLES SHALL BE DESIGNED SO THAT CARS AND VANS, WHEN PARKED, CANNOT OBSTRUCT THE REQUIRED CLEAR WIDTH OF ADJACENT ACCESSIBLE ROUTES. 11B–502.7



PROVIDE WHEEL STOPS AS REQUIRED TO PREVENT A PARKED CAR FROM ENCROACHING INTO THE ACCESSIBLE ROUTE. 11B–502.7

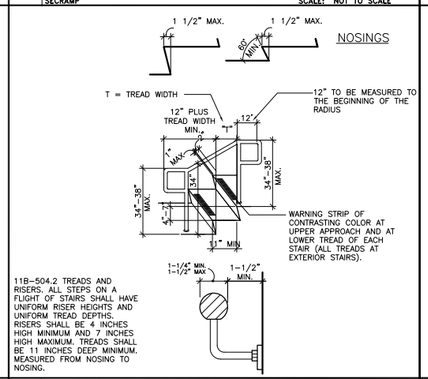
17 TYPICAL WHEEL STOP
SCALE: 1" = 1'-0"



NOTE: INTERNATIONAL SYMBOL OF ACCESS TO BE PAINTED TRAFFIC WHITE ON ROYAL BLUE BACKGROUND 2019 CALIFORNIA BUILDING CODE.

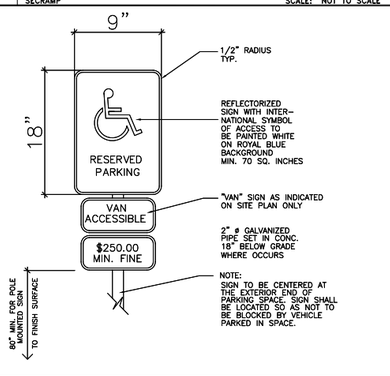
16 ACCESSIBLE PARKING SYM.
HCSYMBOL SCALE: 1 1/2" = 1'-0"

14 SECTION @ SLOPING SIDEWALK
SECRAMP SCALE: NOT TO SCALE

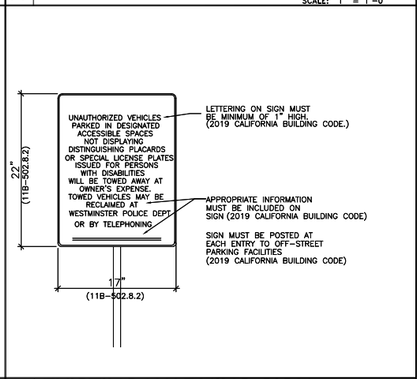


11B–504.2 TREADS AND RISERS. ALL STEPS ON A FLIGHT OF STAIRS SHALL HAVE UNIFORM RISER HEIGHTS AND UNIFORM TREAD DEPTHS. RISERS SHALL BE 4 INCHES HIGH MINIMUM AND 7 INCHES HIGH MAXIMUM. TREADS SHALL BE 11 INCHES DEEP MINIMUM, MEASURED FROM NOSING TO NOSING.

13 TYPICAL STAIR DETAIL
STAIR SCALE: 1" = 1'-0"



13 ACCESSIBLE SIGN
SCALE: 1 1/2" = 1'-0"



12 EXISTING WARNING SIGN
SCALE: 1–1/2" = 1'-0"

ACCESSIBLE REQUIREMENTS

ACCESSIBLE STALLS STRIPING SHALL COMPLY WITH LATEST ACCESSIBILITY CODES

ACCESSIBLE PARKING SPACE REQUIREMENTS

SPACE WIDTH: 14'–0" (9'–0" PARKING AREA, 5'–0" UNLOADING AREA)
SPACE DEPTH: 18'–0"

ACCESSIBLE VAN PARKING

SPACE WIDTH: 17'–0" (12'–0" PARKING AREA, 5'–0" UNLOADING AREA)
SPACE DEPTH: 18'–0"

ACCESSIBLE SIGNAGE REQUIREMENTS

POSTED SIGN: 7" X 10" METAL SIGN, PAINTED BLUE W/ WHITE LETTERING NOT LESS THAN 1" IN HEIGHT, SIGN TO BE 80" IF POLE MOUNTED, 36" IF WALL MOUNTED.

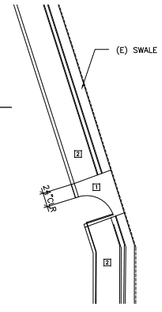
SURFACE PAINTED SYMBOL: LOCATED @ EACH ACCESSIBLE STALL STALL PAINTED BLUE, @ LEAST 3 SQ. FT., BORDER AND SYMBOL PAINTED WHITE.

A WHEEL STOP SHALL BE PROVIDED @ EACH ACCESSIBLE PARKING STALL

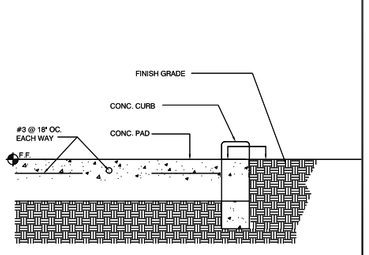
ACCESSIBLE PARKING SPACE

9 EXTERIOR EQUIP. RAMP ENLARGE
SCALE: 1/8" = 1'-0"

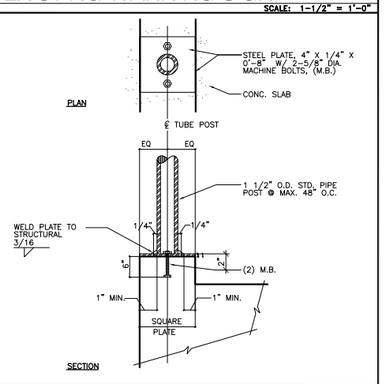
KEYNOTES
1. G.C. TO POUR NEW CONCRETE EQUIPMENT RAMP FOR KITCHEN SUPPLIES AT DELIVERY DOOR. RAMP NOT TO ENCROACH IN FIRE LANE.
2. SEE LANDSCAPE PLANS FOR DETAILS ON LANDSCAPE SURROUNDING NEW RAMP.



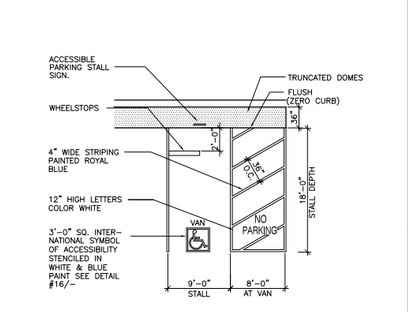
8 SEC. AT CONCRETE PAV.
SCALE: 1–1/2" = 1'-0"



7 POST MOUNTING DETAIL
POSTMOUNTING SCALE: 3" = 1'-0"

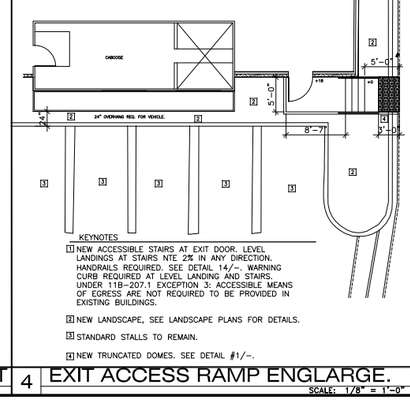


6 TYP. ACCESSIBLE STALL DETAIL
SCALE: 1/8"=1'-0"



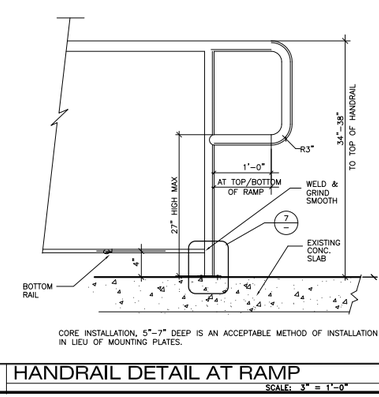
THESE DIMENSIONS ARE TO THE CENTER LINE OF THE 4" WIDE STRIPING

4 EXIT ACCESS RAMP ENGLARGE.
SCALE: 1/8" = 1'-0"



KEYNOTES
1. NEW ACCESSIBLE STAIRS AT EXIT DOOR. LEVEL LANDINGS AT STAIRS NTE 2% IN ANY DIRECTION. HANDRAILS REQUIRED. SEE DETAIL 14/--. WARNING CURB REQUIRED AT LEVEL LANDING AND STAIRS. UNDER 11B–207.1 EXCEPTION 3: ACCESSIBLE MEANS OF EGRESS ARE NOT REQUIRED TO BE PROVIDED IN EXISTING BUILDINGS.
2. NEW LANDSCAPE, SEE LANDSCAPE PLANS FOR DETAILS.
3. STANDARD STALLS TO REMAIN.
4. NEW TRUNCATED DOMES. SEE DETAIL #1/--.

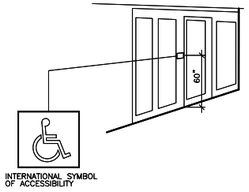
3 HANDRAIL DETAIL AT RAMP
SCALE: 3" = 1'-0"



CORE INSTALLATION, 5"–7" DEEP IS AN ACCEPTABLE METHOD OF INSTALLATION IN LIEU OF MOUNTING PLATES.

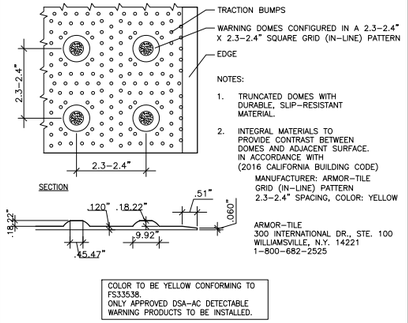
2 REQUIRED ENTRANCE SIGNAGE
ADAB SCALE: N.T.S.

NOTES:
A. ALL ACCESSIBLE ENTRY'S SHALL HAVE A MIN. 5" X 5" INTERNATIONAL SYMBOL OF ACCESSIBILITY DISPLAYED ON THE LATCH SIDE OF THE DOOR. (2019 CALIFORNIA BUILDING CODE)
B. INTERNATIONAL SYMBOL OF ACCESSIBILITY IS MOUNTED 60" IN HEIGHT ABOVE THE LANDING. (2019 CALIFORNIA BUILDING CODE)
C. DIRECTIONAL SIGNS TO ACCESSIBLE BUILDING ENTRANCES AND FACILITIES ARE POSTED AS NECESSARY. (2019 CALIFORNIA BUILDING CODE)



INTERNATIONAL SYMBOL OF ACCESSIBILITY

DETECTABLE WARNINGS SHALL COMPLY WITH 2019 CALIFORNIA BUILDING CODE



NOTES:
1. TRUNCATED DOMES WITH DURABLE, SLIP–RESISTANT MATERIAL.
2. INTEGRAL MATERIALS TO PROVIDE CONTRAST BETWEEN DOMES AND ADJACENT SURFACE. IN ACCORDANCE WITH (2016 CALIFORNIA BUILDING CODE)

MANUFACTURER: ARMOR–TILE
GRID (IN–LINE) PATTERN
2.3–2.4" SPACING, COLOR: YELLOW

ARMOR–TILE
300 INTERNATIONAL DR., STE. 100
WILLIAMSVILLE, N.Y. 14221
1–800–682–2525

COLOR TO BE YELLOW CONFORMING TO FS33538
ONLY APPROVED DSA–AC DETECTABLE WARNING PRODUCTS TO BE INSTALLED.

1 TRUNCATED DOMES
SCALE: 6" = 1'-0"

HATTOX DesignGroup inc
17288 Red Hill Avenue, Studio B | Irvine, California | 92614
p 949.553.8122 | f 949.553.0110 | www.hattoxdesign.com

CALIFORNIA COUNCIL FOR INTERIOR DESIGN CERTIFICATION
CCIDC
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CERTIFIED INTERIOR DESIGNER
COMMERCIAL
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REGISTERED CONSULT FOR

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B&P CODE SECTION 5800 AND DEPARTMENT OF CONSUMER AFFAIRS REGULATIONS SECTION 136 AND 137 DEFINE:
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AGREED.
ACCEPTED THIS DAY OF , 2021
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WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS	DATE	REMARKS

PA / PM:	LH
DRAWN BY:	HA
SQ. FTG.	9,803.SF
JOB NO.:	18–105–09

SHEET
STANDARD SITE DETAILS
ST-2

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Image provided by Google Earth.
Scale: 1 inch= 20 Ft.

The Lighting Analysis, est.layout, Energy Analysis and/or Visual Simulation ("Lighting Design") provided by RAB Lighting Inc. ("RAB") represents an anticipated prediction of lighting system performance based upon design parameters and information supplied by others. These design parameters and information provided by others have not been verified by RAB. Actual performance may vary from these results due to factors outside RAB's control. RAB recommends that design parameters and other information be field verified to reduce variation.

RAB neither warranties, either implied or stated with regard to actual measured light levels or energy consumption provided as a result of this analysis. Additionally, RAB neither warranties, either implied or stated, nor represents the appropriateness, completeness or suitability of the Lighting Design intent as compliant with any applicable regulatory code requirements with the exception of those specifically stated on drawings created and submitted by RAB. The Lighting design is issued, in whole or in part, as advisory documents for informational purposes and is not intended for construction nor as being part of a project's construction documentation package.

Scale: as noted
Date:6/8/2021
Drawn By: K.D. Sullivan, LC

PROJECT # 106047
CASE # 00655010

Filename: Lew Webb 00655010D.AGI

Job Name:
Lew Webb

Lighting Layout
Version D

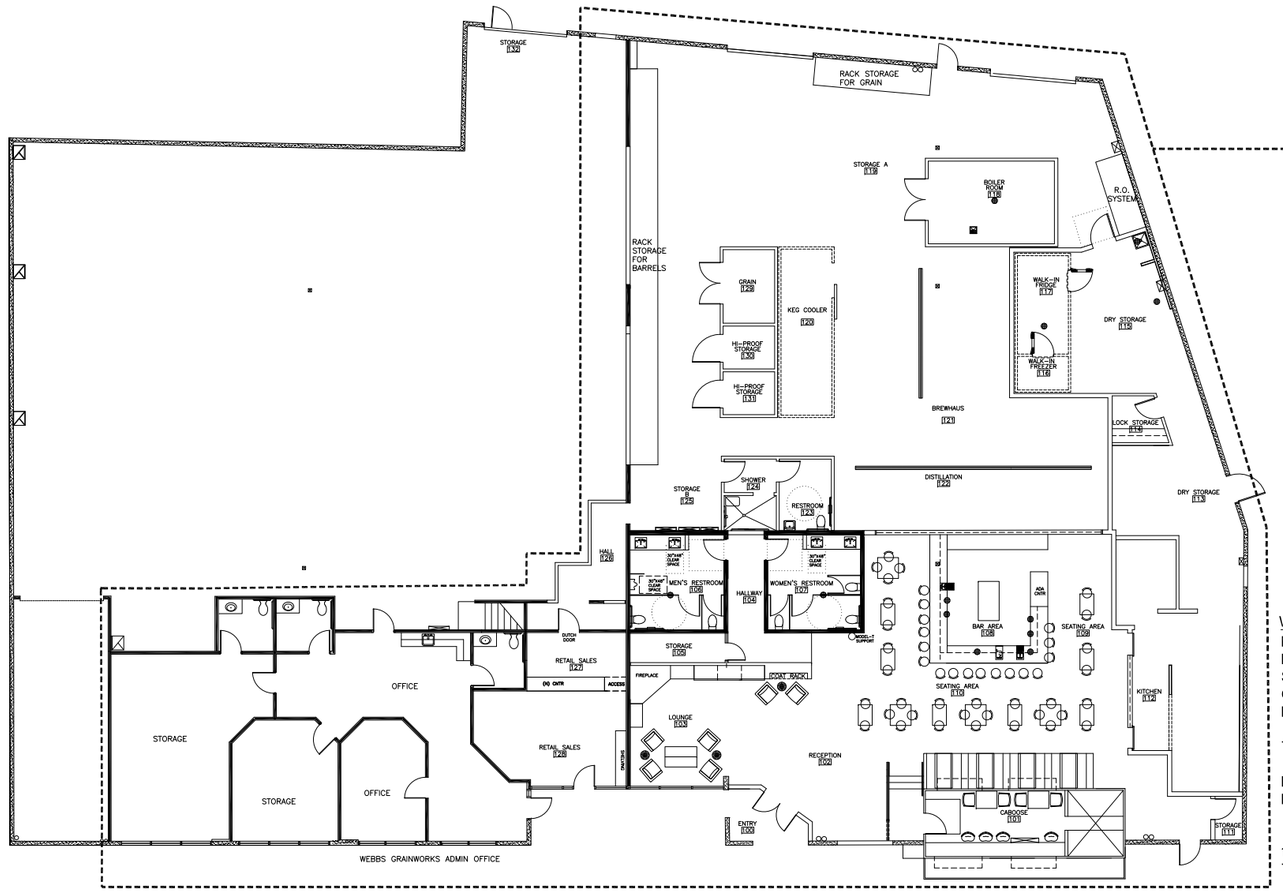
Prepared For:
Electrofep
2015 Bridgeway #201
Sausalito, CA 94965
Tel: 415-332-4100

Filename: D:\PRE-JOBS\6-7 Lew Webb Rev3\Lew Webb 00655010D.AGI

RAB
170 Ludlow Avenue, Northvale, NJ 07647
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TABLE 1
WEBB'S GRAINWORKS 7 JOURNEY
CITY OF ALISO VIEJO MUNICIPAL PARKING CODE (15.38.040) REQUIREMENTS

BUILDING	LANDUSE	SQUARE FEET	PARKING CODE	PARKING REQUIRED
BREWERY OPERATIONS	MICROBREWERY (RESTAURANT, RESTROOMS, BAR, & KITCHEN)	3,615	1 SPACE PER 80 SQ/FT GFA	45.2
	GENERAL LIGHT INDUSTRIAL (PRODUCTION)	822	1 SPACE PER 400 SQ/FT GFA	2.0
	STORAGE	4,794	1 SPACE PER 1,000 SQ/FT OR 1 SPACE PER EMPLOYEE, WHICHEVER IS GREATER	4.8
	GENERAL OFFICE USE	912	1 SPACE PER 250 SF/GFA	3.6
	RETAIL SALES	420	1 SPACE PER 200 SF/GFA	2.1
	SUBTOTAL BREWERY	10,563		57.7
STORAGE	STORAGE (PERSONAL STORAGE)*	9,808	1 SPACE PER 1,000 SQ FT OR 1 SPACE PER EMPLOYEE, WHICHEVER IS GREATER	9.8
	TOTAL BUILDING SQUARE FEET	20,371	TOTAL REQUIRED PARKING	67.5
	TOTAL NUMBER OF PARKING SPACES PROVIDED			68



WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

NORTH ARROW

1/8" = 1'-0"

CONTRACTOR TO VERIFY SITE CONDITIONS PRIOR TO PRICING.
CONTRACTOR SHALL BE RESPONSIBLE FOR VERIFYING ALL EXISTING FIELD CONDITIONS. CONTRACTOR WILL NOTIFY HATTOX DESIGN GROUP, LLC IMMEDIATELY AS TO ANY DISCREPANCIES BETWEEN FIELD CONDITIONS AND WORKING DRAWINGS.

WEBB'S GRAINWORKS

MICROBREWERY	3,615 SF	
LIGHT INDUSTRIAL	822 SF	
STORAGE	4,794 SF	
GENERAL OFFICE USE	912 SF	
RETAIL SALES	420 SF	
TOTAL BREWERY		10,563 SF
PERSONAL STORAGE (1ST FLR)	7,943 SF	
PERSONAL STORAGE (2ND FLR)	1,865 SF	
		9,808 SF
1ST FLOOR TOTAL	18,506 SF	
TOTAL BUILDING (1ST & 2ND FLR)		20,371 SF

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HATTOX | DesignGroup llc
7246 Bed Mill Avenue, Unit#B | Irvine, California | 92614
p 949.559.3112 | f 949.559.3113 | w www.hattoxdesign.com

CALIFORNIA COUNCIL FOR INTERIOR DESIGN CERTIFICATION
CCIDC
ELIZABETH A. HATTOX
CERTIFIED INTERIOR DESIGNER
COMMERCIAL
5846 EXPIRES 12-07-21
CALIFORNIA COUNCIL FOR INTERIOR DESIGN CERTIFICATION

A CERTIFIED INTERIOR DESIGNER IS A COMPETENT DESIGN PROFESSIONAL WHO MAY PREPARE AND SUBMIT NON-STRUCTURAL, NON-SEISMIC CONSTRUCTION DOCUMENTS AND SPECIFICATIONS TO LOCAL BUILDING DEPARTMENTS FOR THE PURPOSES OF PLAN CHECK.

B&P CODE SECTION 5800 AND DEPARTMENT OF CONSUMER AFFAIRS CALIFORNIA ARCHITECTS BOARD SECTION 3100

A CERTIFIED INTERIOR DESIGNER MAY DESIGN ANY TYPE OF NON-STRUCTURAL OR NON-SEISMIC INTERIOR ELEMENT WITHIN SECTION 5800 AND SECTION 3100. THEY MAY ENGAGE IN THE PROGRAMMING, PLANNING, DESIGNING AND DOCUMENTING THE CONSTRUCTION AND INSTALLATION OF NON-STRUCTURAL OR NON-SEISMIC INTERIOR ELEMENTS WITHIN THE INTERIOR OF A BUILDING. "NON-STRUCTURAL" MEANS INTERIOR ELEMENTS THAT ARE NON-LOAD BEARING. "NON-SEISMIC" MEANS INTERIOR ELEMENTS THAT DO NOT ASSIST IN THE SEISMIC BRACING OF A BUILDING'S STRUCTURAL SYSTEM. COMMON NON-STRUCTURAL ITEMS INCLUDE CEILING AND PARTITION SYSTEMS, DOORS, CASEWORK, AND FURNITURE. THEY MAY USE BRACING CONFIGURATIONS AND DO NOT ASSIST IN THE STRUCTURAL INTEGRITY OF A BUILDING.

AGREED:
ACCEPTED THIS DAY OF , 2021
TENANT:
BY:
TITLE:
EXCEPTIONS:

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WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS
DATE	REMARKS

PA / PM:	
DRAWN BY:	
SQ. FTG.	
JOB NO.:	

SHEET
PARKING & AREA CALCULATIONS
PK-1

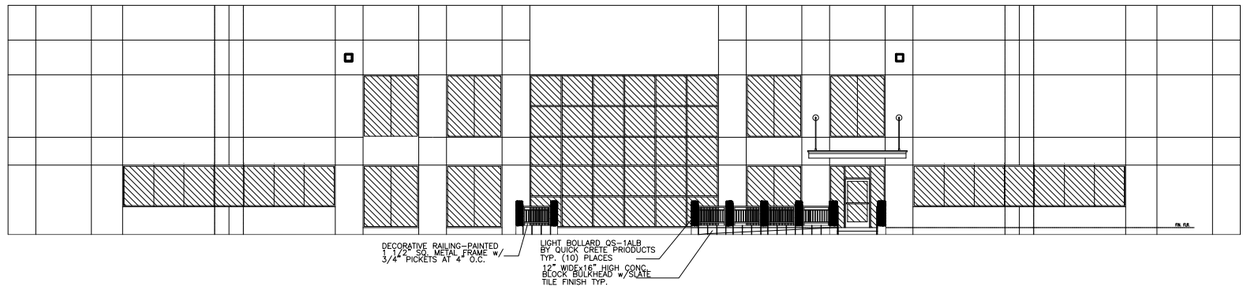


20 EXISTING SOUTH FACADE ELEVATION
FILENAME SCALE: 1/8" = 1'-0"

18

17

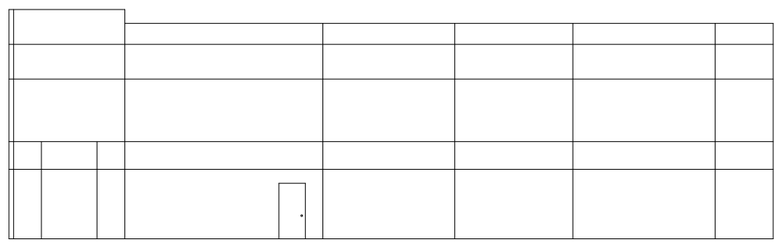
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15 EXISTING FRONT FACADE ELEVATION
FILENAME SCALE: 1/8" = 1'-0"

14

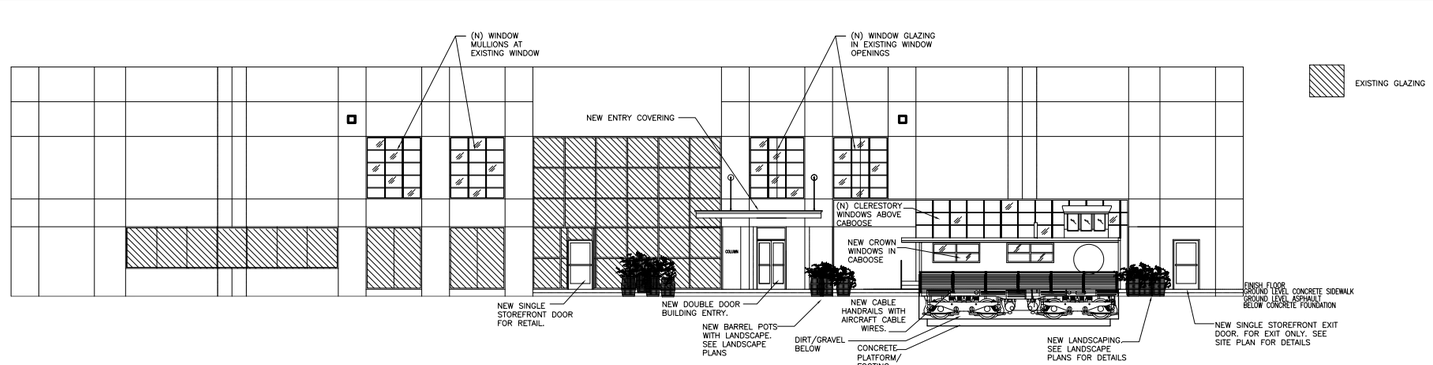
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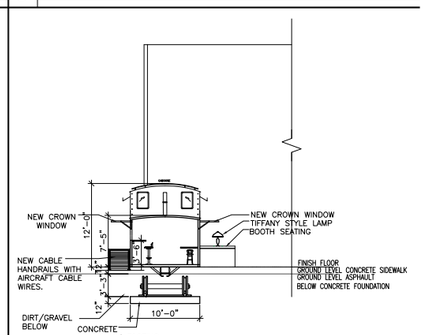
10 EXISTING NORTH FACADE ELEVATION
FILENAME SCALE: 1/8" = 1'-0"

8 PROPOSED NORTH FACADE ELEVATION
FILENAME SCALE: 1/8" = 1'-0"

6



5 PROPOSED FRONT FACADE ELEVATION
FILENAME SCALE: 1/8" = 1'-0"



1 CABOOSE SECTION
FILENAME SCALE: 1/8" = 1'-0"

HATTOX DesignGroup Inc
2102-A Airport Lake Drive, Costa Mesa, CA • 92626
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ELIZABETH A. HATTOX
CERTIFIED INTERIOR DESIGNER
COMMERCIAL
EXPIRES 12/07/21 CID# 5846

A CERTIFIED INTERIOR DESIGNER E.A.C.COMPETENT DESIGN PROFESSIONAL WHO PERFORMS NON-STRUCTURAL OR NON-SEISMIC CONSTRUCTION DOCUMENTS AND SPECIFICATIONS TO LOCAL BUILDING DEPARTMENTS FOR THE PURPOSES OF PLAN CHECK.

BUT CODE SECTION 5805 AND CONSTRUCTION OF STRUCTURES (CCR,Title24,Part2,CBC,Chp58) 5538(b) A CERTIFIED INTERIOR DESIGNER MAY DESIGN ANY TYPE OF NON-STRUCTURAL OR NON-SEISMIC INTERIOR SPACE OR CEILING WITH SECTION 2805 AND 5538(a) OF THIS CODE. A CERTIFIED INTERIOR DESIGNER MAY DESIGN NON-LOAD BEARING PARTITIONS AND NON-LOAD BEARING, TEN (10) POUNDS OR LESS CEILING SYSTEMS. A CERTIFIED INTERIOR DESIGNER MAY DESIGN NON-STRUCTURAL OR NON-SEISMIC EQUIPMENT, WITHIN THE INTERIOR SPACE OF A BUILDING. A CERTIFIED INTERIOR DESIGNER MAY DESIGN NON-LOAD BEARING, "NON-SEISMIC" NEW INTERIOR EQUIPMENT THAT DOES NOT ADD TO THE SEISMIC BRACING OF A BUILDING'S STRUCTURAL SYSTEM. COMMON NON-STRUCTURAL ITEMS INCLUDE CEILING AND PARTITION SYSTEMS AS THESE COMPONENTS SHALL BY NORMAL AND TYPICAL BRACING AND ANCHORING AND DO NOT ASSIST IN THE STRUCTURAL INTEGRITY OF A BUILDING.

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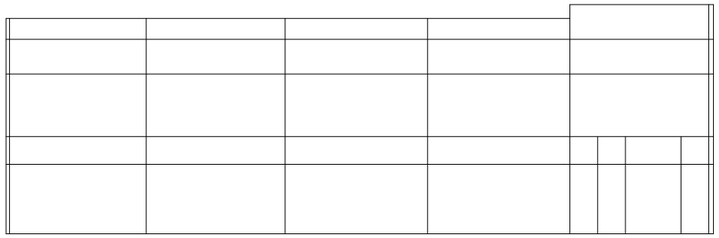
WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS	DATE	REMARKS

PA / PM:	LH
DRAWN BY:	NU
SQ. FTG.	SQ FT
JOB NO.:	18-105-04

SHEET
BUILDING ELEV. & SECTION SHEET
A8.1

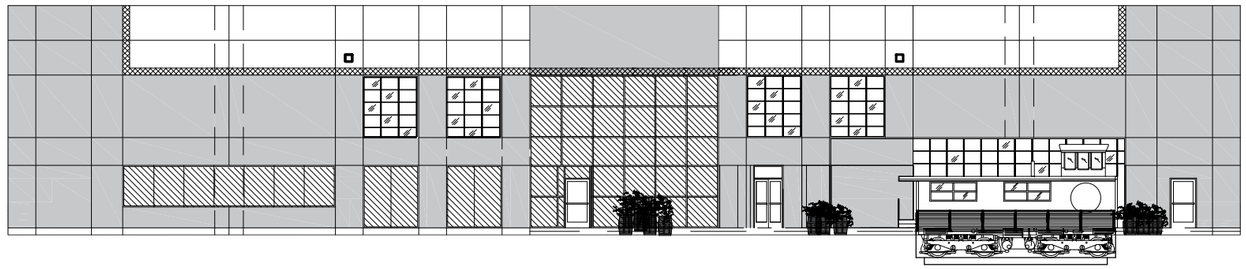
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20 PROPOSED SOUTH FACADE ELEVATION

FILENAME SCALE: 1/8" = 1'-0"

18 17 16



NEW MEDIUM DARK PAINT LOCATION. SEE RENDERING FOR DESIGN INTENT

NEW DARK PAINT LOCATION. SEE RENDERING FOR DESIGN INTENT

NEW LIGHT PAINT LOCATION. SEE RENDERING FOR DESIGN INTENT

EXISTING GLAZING

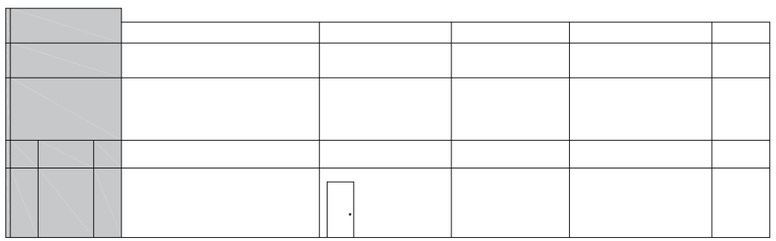
15 PROPOSED FRONT FACADE ELEVATION

FILENAME SCALE: 1/8" = 1'-0"

11

NEW MEDIUM DARK PAINT LOCATION. SEE RENDERING FOR DESIGN INTENTION

NEW LIGHT PAINT LOCATION. SEE RENDERING FOR DESIGN INTENTION



10 PROPOSED NORTH FACADE ELEVATION

FILENAME SCALE: 1/8" = 1'-0"

8 7 6

5 4 3 2 1

404

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31752 Airport Loop Drive, Studio Two | Costa Mesa, CA | 92626
p 949.395.1122 | f 949.395.1133 | w www.hattoxdesign.com

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ELIZABETH A. HATTOX
CERTIFIED INTERIOR DESIGNER
COMMERCIAL
EXPIRES 12/07/21 CID# 5846

A CERTIFIED INTERIOR DESIGNER E & C (CMPTENT DESIGN PROFESSIONAL WITH EXPERIENCE AND EDUCATION) IS QUALIFIED TO PREPARE NON-STRUCTURAL/NON-SEISMIC CONSTRUCTION DOCUMENTS AND SPECIFICATIONS TO LOCAL BUILDING DEPARTMENTS FOR THE PURPOSES OF PLAN CHECK.

PER CODE SECTION 5805 AND DEFINITIONS OF SECTION 202 (Chp2a&B 4/Publ) A CERTIFIED INTERIOR DESIGNER (CID) OR A CERTIFIED INTERIOR DESIGNER WITH DESIGN EXPERIENCE (CIDE) IS COMPETENT WITH SECTION 3005 AND 3006 TO DESIGN NON-STRUCTURAL OR NON-SEISMIC PARTITIONS, CEILINGS AND SIZED CLADDING THE CEILINGS AND NON-LOAD BEARING PARTITIONS ARE CONSIDERED NON-STRUCTURAL OR NON-SEISMIC EQUIVALENT, WITHIN THE INTERIOR SPACES OF A BUILDING. THE CID OR CIDE IS QUALIFIED TO DESIGN NON-STRUCTURAL OR NON-SEISMIC "NON-LOAD BEARING" "NON-SHEAR" INTERIOR ELEMENTS THAT DO NOT ASSIST IN THE SEISMIC BRACING OF A BUILDING'S STRUCTURAL SYSTEM. COMMON NON-STRUCTURAL ITEMS INCLUDE CEILINGS AND PARTITION SYSTEMS. ALTHESE COMPONENTS SHALL BE NORMAL AND TYPICAL BRACING PER CODE AND DO NOT ASSIST IN THE STRUCTURAL INTEGRITY OF A BUILDING.

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ACCEPTED THIS DAY OF , 2021
TENANT:
BY:
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EXCEPTIONS:

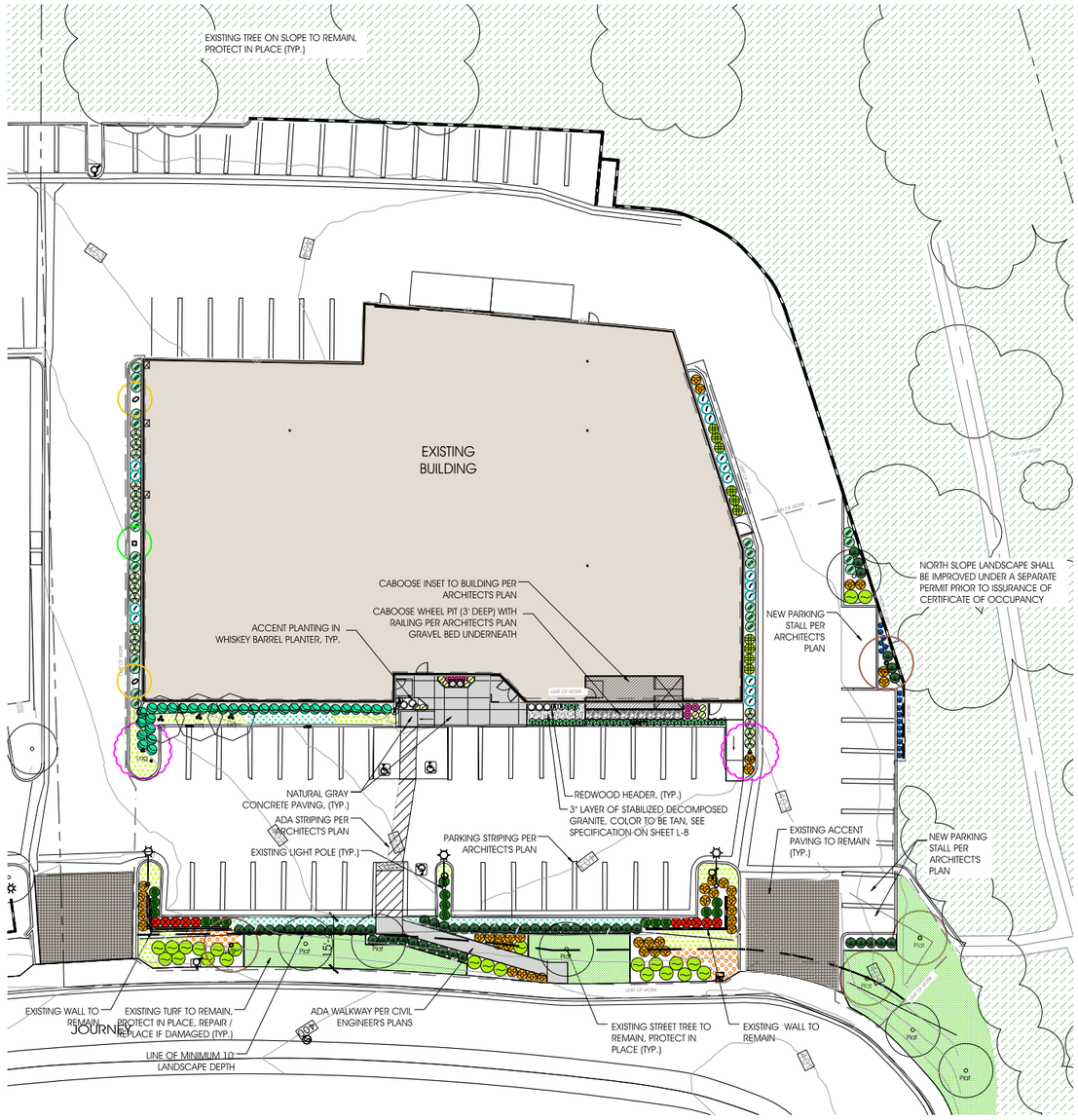
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WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

DATE	REMARKS	DATE	REMARKS

PA / PM:	LH
DRAWN BY:	HA
SQ. FTG.	
JOB NO.:	18-105-04

SHEET
BUILDING ELEV.
PAINT LOC. SHEET
A8.2



LANDSCAPE NOTES

- ALL LANDSCAPE PLANS AND INSTALLATIONS SHALL COMPLY WITH CITY DESIGN GUIDELINES, CODES AND REGULATIONS.
- LOW VOLUME DISTRIBUTION IRRIGATION SYSTEM WITH WEATHER BASED AUTOMATIC IRRIGATION CONTROLLER SHALL BE USED IN COMPLIANCE WITH THE CITY WATER EFFICIENT LANDSCAPE GUIDELINES.
- MICRO SPRAY, STREAM BUBBLER, DRIP BUBBLER, AND ROTOR AND ROTATOR MWELO-COMPLIANT NOZZLES SHALL BE USED FOR LOW VOLUME IRRIGATION WATER DISTRIBUTION.
- IRRIGATION SYSTEM WILL BE EQUIPPED WITH MASTER VALVE AND PRESSURE REGULATOR TO PREVENT WATER WASTE.
- SPRINKLER HEADS SHALL BE EQUIPPED WITH PRESSURE REGULATOR AND CHECK VALVE TO PREVENT MISTING AND HEAD DRAINAGE.
- NEW TREES SHALL BE IRRIGATED SEPARATELY FROM SHRUBS AND GROUND COVERS.
- SPRINKLER HEADS SHALL BE INSTALLED IN LOCATIONS WHERE IRRIGATION WATER IS CONTAINED WITHIN PERVIOUS SURFACE.
- QUICK COUPLING VALVES SHALL BE LOCKING TYPE.
- IRRIGATION SYSTEM SHALL BE MONITORED FOR LEAKS AND BREAKAGE WEEKLY.
- WATERING SCHEDULE SHALL BE REVIEWED QUARTERLY.
- MAJORITY OF PLANT MATERIAL SHALL BE LOW OR VERY LOW WATER USE MATERIAL EXCEPT IN SHADE AREAS.
- PLANTING MATERIAL SHALL MEET NURSERY STANDARD CROWN WIDTH AND HEIGHT FOR THE SPECIFIED CONTAINER SIZE.
- ALL PLANTING AREA SHALL BE DRESSED WITH MIN. 3" LAYER OF MULCH.
- SITE SOIL SHALL BE TESTED FOR AGRICULTURAL SUITABILITY AND SOIL MANAGEMENT PURPOSES AFTER SITE GRADING, BUT PRIOR TO PLANTING. SITE SOIL IN PLANTING AREA SHALL BE ROTOTILLED AND AMENDED ACCORDING TO SOILS TEST RECOMMENDATIONS.
- LANDSCAPE AREAS SHALL BE PERMANENTLY MAINTAINED BY OWNER.
- 24" DEEP ROOT BARRIER SHALL BE INSTALLED WHERE TREES ARE PLANTED 5' OR LESS OF HARDSCAPE SURFACE.

AREA TABULATION

TOTAL SITE AREA	112,733 S.F. (2.588 ACRE)
LANDSCAPE AREA IN PARKING AREA	2,433 S.F. (2.2%)
NON-PARKING AREA LANDSCAPE (EXCLUDING ASSOCIATION SLOPES)	3,618 S.F (3.2%)
NON-PARKING AREA LANDSCAPE (INCLUDING ASSOCATING SLOPES)	65,809 S.F. (58.4%)

BARREL PLANTER ACCENT PLANTING


Aeonium 'Sunburst'
Sunburst Aeonium


Dianella revoluta 'Little Rev'
Little Rev Flax Lily


Senecio c. 'Senaw'
Angel Wings Senecio


Portulacaria afra 'Prostrata'
Trailing Elephant Bush

SUCCULENT GROUND COVERS


Aeonium 'Kiwi'
Kiwi Aeonium


Sedum n.Coppertone
Coppertone Stonecrop


Senecio serpens
Blue Pickle

PLANTING LEGEND

(SUNSET ZONE 23)

Symbol	Botanical Name	Common Name	Size / Form	QUANTITY	WUCOLS (Region 3)
TREES					
TREE HEIGHT AT TIME OF INSTALLATION SHALL BE 8' FROM TOP OF ROOT BALL TO TOP OF CROWN, EXCEPT FOR CITRUS TREES					
	Citrus × latifolia (6-10' mature size)	Bearss lime	24" Box Standard	1	Mod
	Citrus × meyeri (6-10' mature size)	Meyer lemon	24" Box Standard	2	Mod
	Cupressus s. 'Tiny Towers'	Tiny Tower Italian Cypress	24" BOX	16	Low
Plat	Platanus x acerifolia 'Columbia'	London Plane Tree	36" Box Standard	4	Mod
Lag	Lagerstroemia hybrid 'Tuscarora'	Hybrid Crape Myrtle	36" Box Standard	2	Mod
			TOTAL PROPOSED	25	
SHRUBS					
	Abelia x grandiflora 'Kaleidoscope'	Variegated Abelia	5 gallon	6	Mod
	Aloe 'Blue Elf'	Blue Elf Aloe	5 gallon	16	Low
	Aloe 'Erik the Red'	Erik the Red Aloe	15 gallon	10	Low
	Bulbine frutescens 'Hallmark'	Orange Stalked Bulbine	1 gallon	42	Low
	Carex divulsa	Berkley Sedge	1 gallon	32	Low
	Coprosma 'Taupata Gold'	Gold Splash Mirror Plant	5 gallon	20	Mod
	Dianella 'Little Rev'	Little Rev Flax Lily	5 gallon	9	Low
	Lomandra longifolia 'Breeze'	Dwarf Mat Rush	1 gallon	26	Low
	Frangula californica 'Eve Case'	Dwarf Coffeeberry	5 gallon	16	Low
	Rosmarinus 'Chef's Choice'	Chef's Choice Rosemary	5 gallon	16	Low
	Senecio ficoides 'Mount Everest'	Skyscraper Senecio	5 gallon	5	Low
	Westringia 'Blue Gem'	Blue Gem Coast Rosemary	5 gallon	57	Low
	Westringia 'Morning Light'	Variegated Coast Rosemary	5 gallon	16	Low
	Westringia 'Mundi'	Mundi Coast Rosemary	5 gallon	24	Low

BARREL PLANTER
OWNER TO PROVIDE 53 GAL. WHISKEY BARRELS ON 3" LAYER OF 3/4" CLEAN GRAVEL.
(2) PLANTING SCHEMES

①	(2)	Senecio candicans 'Senaw' Angel Wings Senecio	1 gal.	o (4)	Sedum 'Coppertone' Coppertone Sedum	4" pot
②	(2)	Portulacaria afra 'Prostrata' Trailing Elephant Bush	1 gal.			
③	(2)	Dianella 'Little Rev' Little Rev Flax Lily	5 gal.	o (4)	Sedum 'Coppertone' Coppertone Sedum	4" pot
④	(1)	Aeonium 'Sunburst' Sunburst Aeonium	4" pot			

GROUND COVERS

Aeonium 'Kiwi'	Kiwi Aeonium	1 gallon @ 12" o.c.
Sedum nassbaumerianum	Coppertone Stonecrop	1 gallon @ 12" o.c.
Senecio serpens	Blue Chalk Sticks	from flats @ 8" o.c.

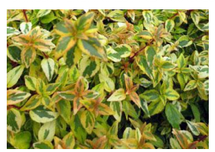
EXISTING TURF TO REMAIN, REPAIR/REPLACE PORTION THAT ARE DAMAGED BY CONSTRUCTION

SLOPE IRRIGATION AND PLANTING RENOVATION BY PACIFIC PARK II BUSINESS ASSOCIATION. NORTH SLOPE LANDSCAPE SHALL BE IMPROVED UNDER A SEPARATE PERMIT PRIOR TO ISSURANCE OF CERTIFICATE OF OCCUPANCY

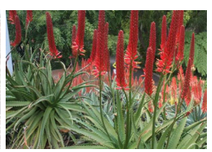
EXISTING TREES TO BE PROTECTED IN PLACE - REFER TO SHEET LC-2 FOR EXISTING TREE EXHIBIT

Liq	Liquidambar styraciflua	American Sugar Gum
Plat	Platanus x acerifolia	London Plane Tree
	Existing trees on Pacific Park II Business Association maitained slope	

SHRUBS PERENNIALS AND GRASSES


Abelia x grandiflora 'Kaleidoscope'
Variegated Abelia


Aloe 'Blue Elf'
Blue Elf Aloe


Aloe 'Erik the Red'
Erik the Red Aloe


Bulbine frutescens 'Hallmark'
Orange Stalked Bulbine


Carex divulsa
Berkeley Sedge


Coprosma repens 'Taupata Gold'
Gold Splash Mirror Plant


Dianella revoluta 'Little Rev'
Little Rev Flax Lily


Lomandra longifolia 'Breeze'
Dwarf Mat Rush


Frangual californica 'Eve Case'
Dwarf Coffeeberry


Rosmarinus officinalis 'Chef's Choice'
Chef's Choice Rosemary


Senecio f.'Mount Everest'
Skyscraper Senecio

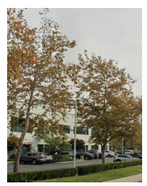

Westringia 'Blue Gem'
Blue Gem Coast Rosemary

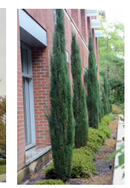

Westringia 'Morning Light'
Morning Light Coast Rosemary


Westringia 'Mundi'
Mundi Coast Rosemary

TREES


Lagerstroemia 'Muskogee'
Hybrid Crape Myrtle


Platanus x acerifolia
London Plane Tree


Cupressus 'Tiny Towers'
Tiny Tower Italian Cypress


Myer Lemon


Bearss Lime

0' 10' 20' 40' 60'
SCALE: 1"=20'

NORTH

conceptual design & planning company
3190-C Airport Loop Drive
Studio One
Costa Mesa, CA 92626
T: 949.399.0870
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REGISTERED LANDSCAPE ARCHITECT
JAMES F. BALDOVIN 4176
Signature
July 31, 2021
Exp. Date
STATE OF CALIFORNIA

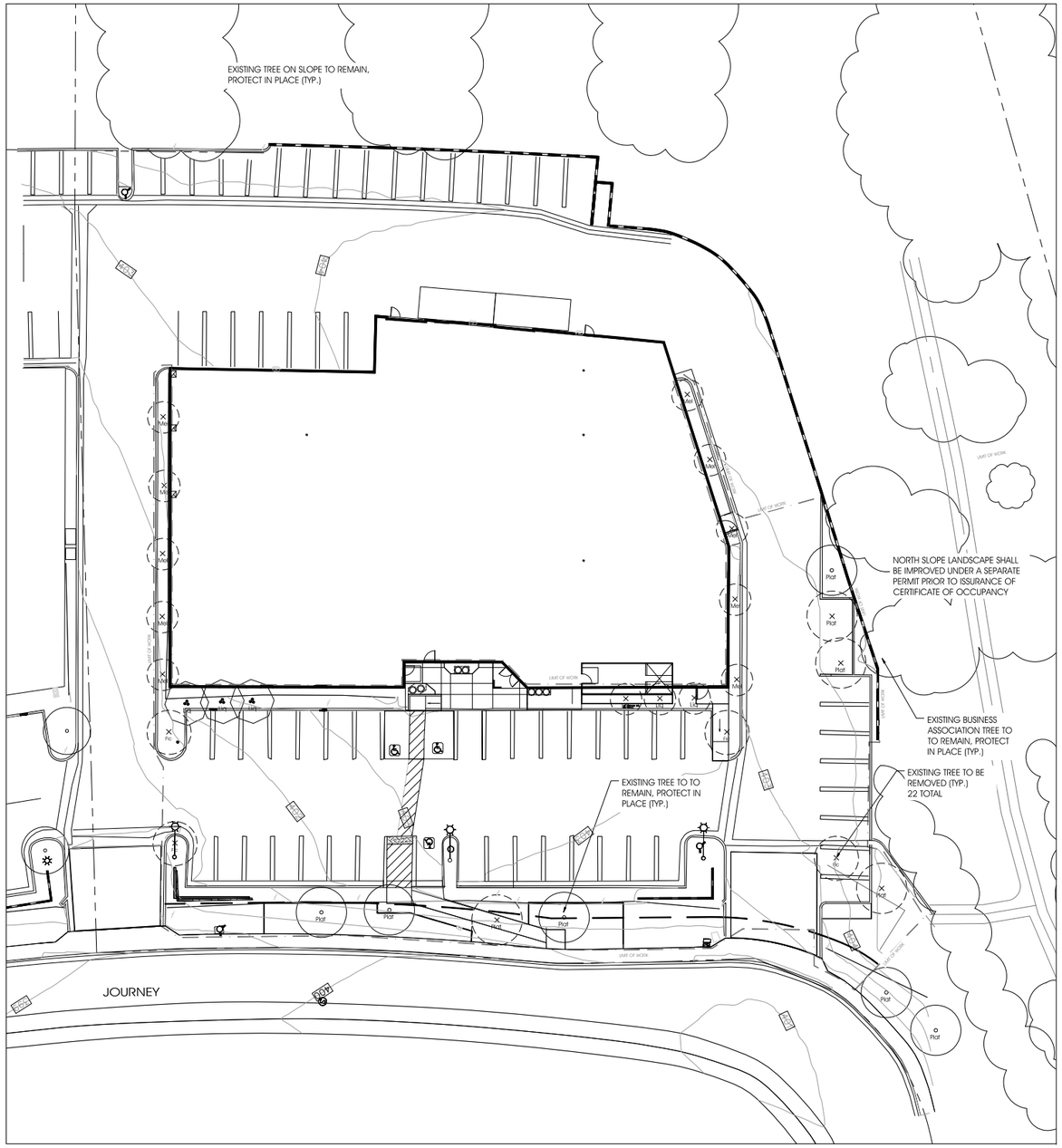
REVISIONS		
No.	Date	Description
	8/21/2021	2nd Site Dev. Permit submittal
		Bid Set Issued :

Project Title
WEBB'S GRAINWORKS
7 JUDWAY, ALISO VIEJO, CA 92656

CLIENT
WEBB'S GRAINWORKS
7 JUDWAY, ALISO VIEJO, CA 92656

Sheet Title
CONCEPTUAL LANDSCAPE PLAN

Project No.	21019
Drawn	MO
Checked	MK/JF
File Name	
Date Issued	07-02-21
Sheet Number	LC-01



EXISTING TREE LEGEND

EXISTING TREES TO BE PROTECTED IN PLACE

Symbol	Botanical Name	Common Name	WUCOLS Region 3
Liq	Liquidambar styraciflua	American Sugar Gum	Mod
Plat	Platanus x acerifolia	London Plane Tree	Mod
	Pinus eldarica on slope	Mondel Pine	Low

EXISTING TREE TO BE REMOVED

GRIND STUMP AND ROOTS COMPLETELY AND REMOVE SAWDUST, DISPOSE OF IT PROPERLY OFF-SITE. DO NOT USE AS MULCH

Symbol	Botanical Name	Common Name	QUANTITY	WUCOLS Region 3
SPECIES IDENTIFIATION				
Fic	Ficus m. 'Green Gem'	Green Gem Indica Laurel Fig	4	Mod
Liq	Liquidambar styraciflua	American Sugar Gum	3	Mod
MeL	Melaleuca quinquenervia	Cajeput Tree	10	Low
Pla	Platanus x acerifolia	London Plane Tree	4	Mod
		TOTAL REMOVAL	21	

0' 10' 20' 40' 60'

SCALE: 1" = 20'

NORTH

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REGISTERED LANDSCAPE ARCHITECT JAMES F. BALDOVIN 4176 STATE OF CALIFORNIA
Signature
July 31, 2021
Exp. Date

REVISIONS		
No.	Date	Description
	8/20/2021	2nd Site Dev. Permit submittal

Bid Set Issued :

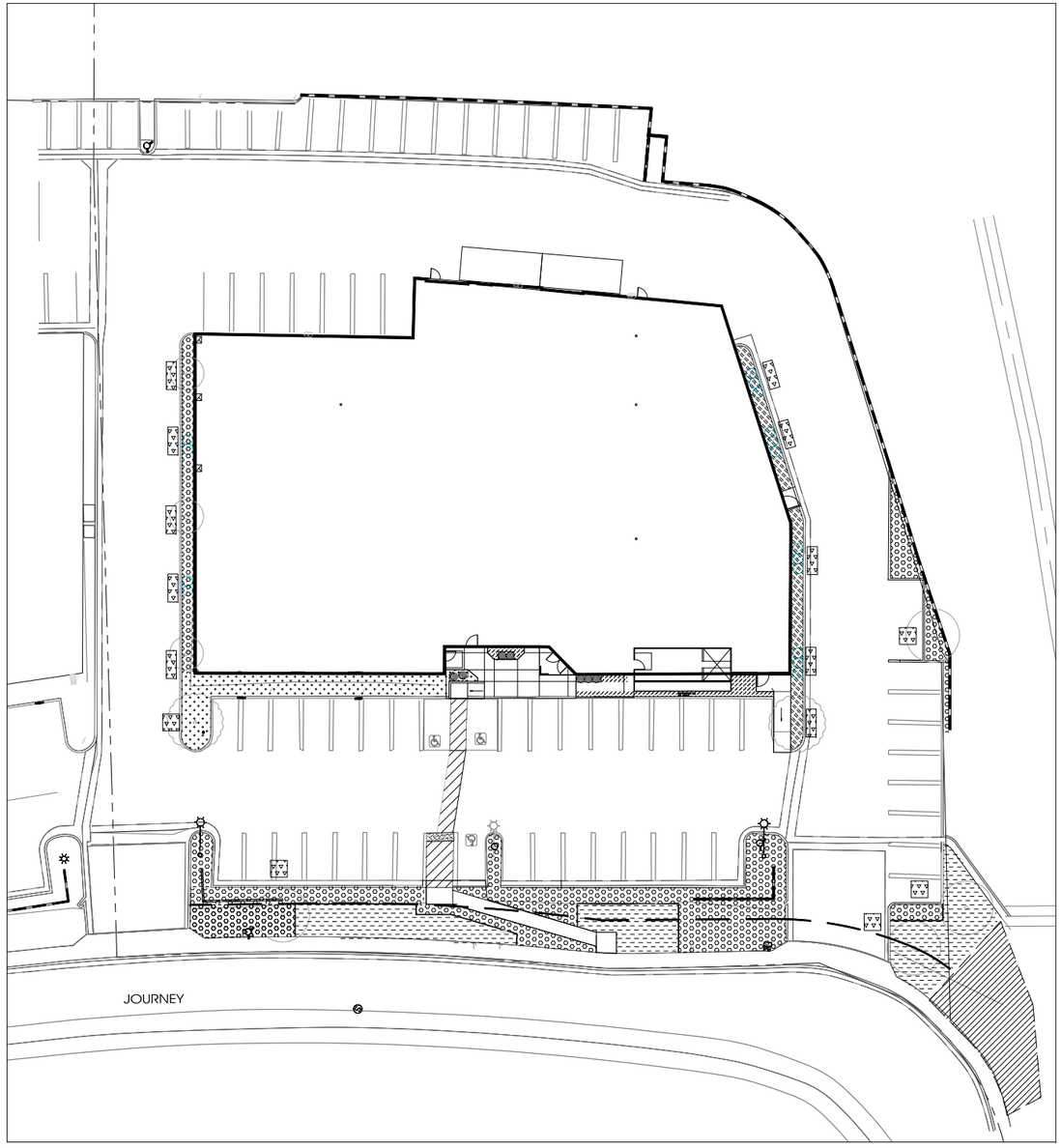
Project Title
WEBB'S GRAINWORKS
7 JOURNEY / ALISO VIEJO, CA 92656

CLIENT
WEBB'S GRAINWORKS
7 JOURNEY / ALISO VIEJO, CA 92656

Sheet Title
EXISTING TREE EXHIBIT

Project No.	21019
Drawn	MO
Checked	MK/JF
File Name	21019_P.dwg
Date Issued	07-02-21
Sheet Number	LC-02

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LEGEND

Hydrozone	Key	Water Use	Exposure	Irrigation Nozzle Type
HZ-1		Low	Sun	Micro Spray (Rainbird SQ)
HZ-2		Low	Shade	Micro Spray (Rainbird SQ)
HZ-3		Mod	Shade	Drip (Barrel planters)
HZ-4		Mod	Sun	Tree bubbler
HZ-5		Mod	Shade	Micro Spray (Rainbird SQ)
HZ-6		Mod	Sun	Low Volume Spray (existing turf)
HZ-7		Mod	Shade	Bubbler

WATER USE PERCENTAGE

LOW	63.32 %
Mod.	12.11 %
(E) TURF	24.57 %

Hydrozone Information Table

Landscape Coefficient (Kl) — **Kl = Ks x Kd x Kmc**

Ks	Species factor
Kd	Density factor
Kmc	Microclimate factor

Hydrozone	Controller Valve #	Plant Water Use*	Species Factor(Ks)	Density Factor (Kd)	Micro-climate Factor (Kmc)	Landscape Coefficient (Kl)	Plant Type	Irrigation Method**	IE (Irrigation Efficiency)	Landscape Area (LA) square feet	% of total landscape area	Kl x LA (Sq. Ft.)
HZ 1	*1,5*	*L*	*0.2*	*1.0*	*1.0*	*0.20*	*S,G*	*MS*	*0.75*	*3,301*	*52.60%*	*660.2*
HZ 2	*3*	*L*	*0.2*	*1.0*	*0.5*	*0.10*	*S,G*	*MS*	*0.75*	*673*	*10.72%*	*67.3*
HZ 3	*8*	*M*	*0.5*	*1.0*	*1.0*	*0.50*	*S,G*	*D*	*0.81*	*22*	*0.35%*	*11*
HZ 4	*2*	*M*	*0.5*	*1.0*	*1.0*	*0.50*	*T*	*TB*	*0.80*	*225*	*3.59%*	*112.5*
HZ 5	*9*	*M*	*0.5*	*1.0*	*1.0*	*0.50*	*S,G*	*MS*	*0.75*	*335*	*5.34%*	*167.5*
HZ 6	*4*	*M*	*0.5*	*1.0*	*1.0*	*0.50*	*TF**	*LVS*	*0.75*	*1,542*	*24.57%*	*771*
HZ 7	*7*	*M*	*0.5*	*1.0*	*1.0*	*0.50*	*S,G*	*B*	*0.80*	*178*	*2.84%*	*89*
										6,276	100.0%	

* Plant Water Use		Species Facor (Ks)		Micro-climate factor (Kmc)		Landscape Type		**Irrigation Method		
H	= High Water Use	0.7 - 0.9	=High	0.5-0.9	= Protected, shade	S	=Shrub	MS	0.75	= Micro Spray
M	= Moderate Water Use	0.4 - 0.5	=Moderate	1.0	= Average	G	=Groundcovers	TB	0.8	= Tree Bubbler
L	= Low Water Use	0.1 - 0.3	=Low	1.1 - 1.4	=high wind, reflected sun	T	=Tree	R	0.75	= Rotor/Rotator
						P	=Palm	D	0.81	= Drip Emitters
						TF*	=Turf(Existing-established)	B	0.8	= Shrub Bubbler

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DIGALERT DIAL TOLL FREE 811
AT LEAST TWO DAYS BEFORE YOU DIG
UNDERGROUND SERVICE ALERT (USA)

0' 10' 20' 40' 60'
SCALE: 1" = 20'

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REGISTERED LANDSCAPE ARCHITECT JAMES F. BALDOVIN 4176 STATE OF CALIFORNIA
Signature
July 31, 2021
Exp. Date
LA

REVISIONS		
No.	Date	Description
	8/2/2021	2nd Site Dev. Permit submittal

Bid Set Issued :

Project Title
WEBBS GRAINWORKS
7 JOURNEY, ALISO VIEJO, CA 92656

CLIENT
WEBBS GRAINWORKS
7 JOURNEY, ALISO VIEJO, CA 92656

Sheet Title
HYDRO ZONE MAP

Project No.	21019
Drawn	MO
Checked	MK/JF
File Name	21019-l.dwg
Date Issued	07-02-21
Sheet Number	LC-03

Conceptual Design & Planning Company, Aug 20, 2021 3:03pm P:\21\21019 Webbs Grainworks\Land\CDs\CD03\ 21019-l.dwg MOZAWA

Webb's Grainworks

7 Journey, Aliso Viejo

PA21-014 (SDP) – Site Development Permit

City Council
January 19, 2022

Project Details

PA21-014 (SDP) is an application for a site development permit to:

- Redesign to the building façade;
- Upgrade landscaping; and
- Modify the parking lot to ensure onsite parking lot requirements are met and satisfy state accessibility requirements

Webb's Grainworks – Previous Entitlement

On January 20, 2021, the City Council approved PA18-020 (CUP/AUP) for:

- Conditional Use Permit:
  - Distillery
  - Microbrewery
  - Tasting room (small-scale restaurant)
- Administrative Use Permits:
  - Three ABC Licenses (Type 06, 23, & 74)
  - Specialized Research & Development

7 Journey – Building Summary

20,371 square foot building:

- Webb's Grainworks – 10,563 square feet
- Property Owner Storage – 9,808 square feet



Webb's Grainworks – Architectural Modifications

- Exterior Building Modifications
  - Introduce train caboose to building façade
  - Paint entire building to update building appearance
  - Upgrade all windows – distinctive design that reflects a traditional, older warehouse building
  - Add canopies above primary entrance of Webb's Grainworks and above train caboose

Webb's Grainworks – Train Caboose

- New Train Caboose
  - Adaptively reused train caboose – visible from the exterior
  - Restored and retrofitted to accommodate additional dining area and storage
  - Retain original patina finish – reflect the authenticity of the caboose as a once-functional train car
  - Exterior representation of the Webb's Grainworks brand and Prohibition Era-style of interior design

Webb's Grainworks – Train Caboose (cont.)

- Adds 39 s.f. of new restaurant space and 17 s.f. of storage
- Building entry revised to offset increase in parking – 68 s.f. of building area to be removed
- Total number of parking spaces required – 68 (consistent with approval of PA18-020)
- Intended to differentiate the building from similar industrial/warehouse buildings in the area
- Establish a memorable and unique visual cue to the business establishment

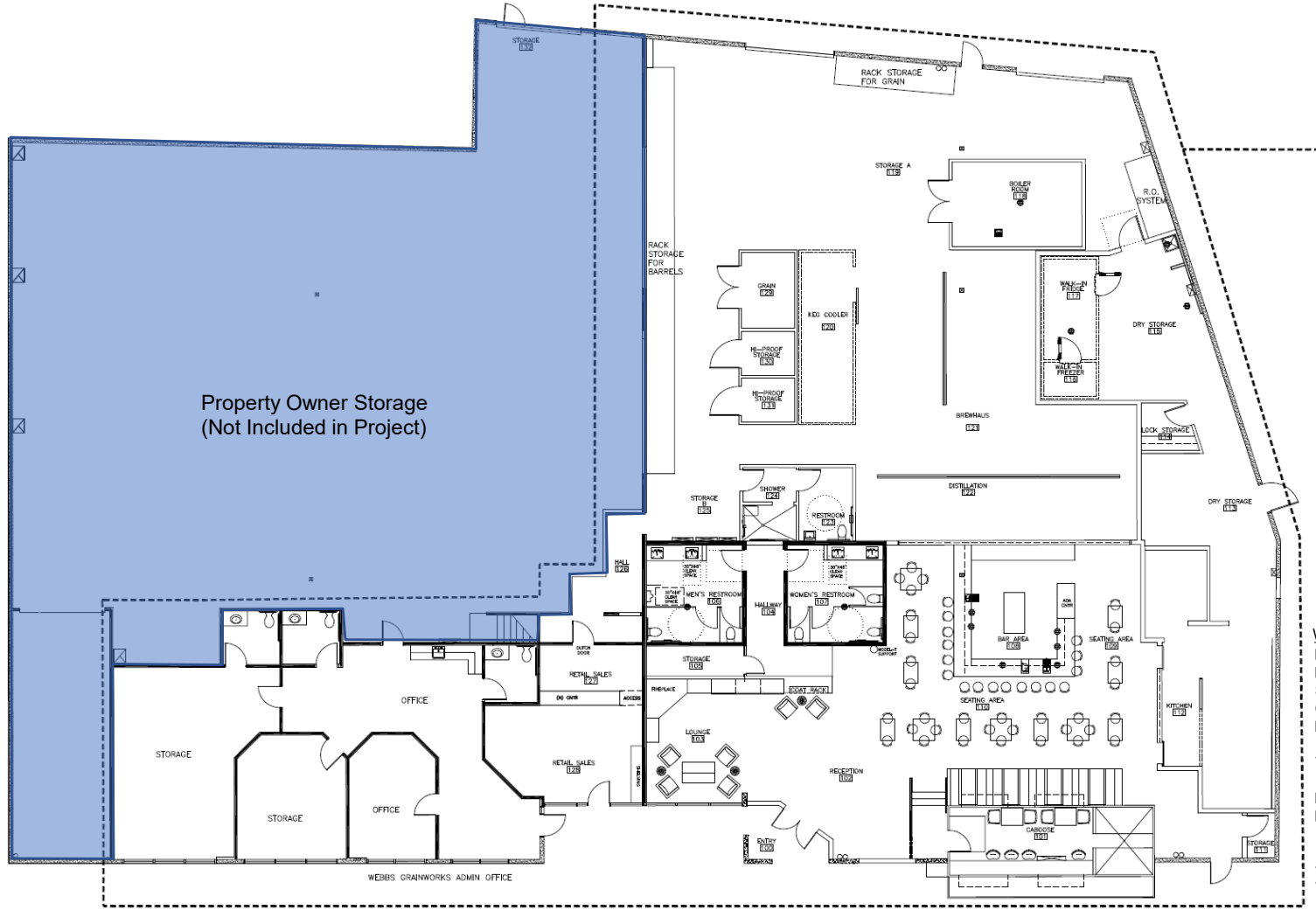
Webb's Grainworks – Landscaping

- Upgraded Landscaping Throughout Site
  - Removal of eucalyptus and liquid amber trees
  - Slope repair and improvements along northern portion of the property
  - New landscaping intended to enhance property views from street
  - Contemporary plant palette to provide an updated and modern aesthetic

Webb's Grainworks – Parking Lot Modifications

- PA18-020 (CUP/AUP) – approved to add 6 spaces onsite to meet parking space requirements
- Modifications to parking space locations and realignment of paths of travel to meet State Accessibility Requirements
- No change to the number of spaces provided onsite

Webb's Grainworks – Floor Plan



WEBB'S GRAINWORKS
7 JOURNEY
ALISO VIEJO, CA 92656

NORTH ARROW

WEBB'S GRAINWORKS		
MICROBREWERY	3,615 SF	
LIGHT INDUSTRIAL	822 SF	
STORAGE	4,794 SF	
GENERAL OFFICE USE	912 SF	
RETAIL SALES	420 SF	
TOTAL BREWERY		10,563 SF
PERSONAL STORAGE (1ST FLR)	7,943 SF	
PERSONAL STORAGE (2ND FLR)	1,865 SF	
		9,808 SF
1ST FLOOR TOTAL	18,506 SF	
TOTAL BUILDING (1ST & 2ND FLR)		20,371 SF

Updated Building Façade





Train Caboose



Staff Recommendation to City Council:

1. Open and conduct a public hearing;
2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15301 (Existing Facilities); and
3. Adopt a Resolution (Attachment 1) approving Planning Application PA21-0174 (SDP) for a site development permit to allow for exterior modifications to the building and parking lot, including redesign of the primary building elevation, upgrades to landscaping, and adjustments to the parking lot to satisfy accessibility requirements, at 7 Journey.

Webb's Grainworks

7 Journey, Aliso Viejo

PA21-014 (SDP) – Site Development Permit

City Council
January 19, 2022

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: Omar Dadabhoy, Community Development Director
Rose Rivera, Senior Planner

SUBJECT: GENERAL PLAN AMENDMENT PA21-019 (GPA) TO CONSIDER ADOPTION OF AN AMENDED HOUSING ELEMENT

Recommended Actions:

1. Open and conduct a public hearing;

2. Find that the request is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15061(b)(3) (Common Sense Exemption); and

3. Adopt a Resolution making findings under the California Environmental Quality Act and approving Planning Application PA21-019 (GPA) approving a general plan amendment to adopt the 2021-2029 Housing Element Update.

Fiscal Impact:

None. The Local Early Action Planning (LEAP) Grants Program funding of $150,000 was appropriated for the Housing Element Update preparation.

Background:

State law requires every city and county in California to prepare, adopt and implement a General Plan, which establishes overall goals and policies for future growth of the jurisdiction. As set out in California Government Code, a city's General Plan must include a Housing Element as one of seven mandatory elements. The Housing Element must include policies and programs to meet the City's existing and future housing needs, as established by the California Department of Housing and Community Development ("HCD") and the Southern California Association of Governments ("SCAG"). State law requires that the Housing Element be updated every eight years. This update will cover the next eight-year planning period (2021-2029).

On May 19, 2021, a study session was conducted to provide the City Council, interested parties and community stakeholders with an overview of the Housing Element update and

to evaluate sites which could potentially accommodate additional housing. Comments from the City Council and the public were heard and considered, and where appropriate, incorporated into the City's draft Housing Element. Subsequent to the study session, staff along with John Douglas, the City's housing element consultant, prepared a draft update to the Housing Element. On August 18, 2021, the City Council held a public meeting to review the draft Housing Element update and directed staff to submit the document to the California Department of Housing and Community Development (HCD) for a 60-day review and comment period. On October 18, 2021, the City received a written letter from HCD describing changes necessary to the draft document to bring it into compliance with State law.

Discussion:

Content of the Housing Element

The Housing Element is a mandated component of the General Plan and satisfies requirements of state planning law. The Aliso Viejo Housing Element is comprised of two parts – the Housing Plan and the Community Profile. The Housing Plan contains the following sections:

- An introductory overview of the Housing Element and public participation;
- An analysis of potential housing issues and goals and policies to address these issues; and
- An analysis of housing programs to further the City's housing goals and policies during this planning period.

The Community Profile, contained in the General Plan as Appendix C, and part of the Housing Element, is comprised of the following sections:

- Analysis of the City's demographic and housing characteristics and trends;
- Evaluation of resources and opportunities available to address housing needs;
- Analysis of potential governmental and non-governmental constraints to meeting the City's housing needs;
- Review of the City's accomplishments during the previous planning period; and
- An inventory of sites that could accommodate the City's new housing needs.

RHNA Overview

To comply with State law, the City's Housing Element must be updated to ensure that the City's policies and programs can accommodate the estimated existing and projected housing needs for Aliso Viejo identified by SCAG's Regional Housing Needs Assessment (RHNA) allocation for the 2021-2029 planning cycle. Prior to each cycle, the total new housing need for each region of California is determined by HCD based upon economic and demographic trends, existing housing problems such as overcrowding and

overpayment, and additional housing needed to ensure reasonable vacancy rates and replace units lost due to demolition or natural disasters.

The total housing need for the SCAG region, which includes Los Angeles, Orange, Riverside, San Bernardino, Imperial and Ventura counties, is distributed to cities and counties by SCAG based upon objectives and criteria established in State law. In 2019, HCD determined that the total new housing need for the entire SCAG region in the 6th Housing Element cycle is 1,341,827 units. In March 2021, SCAG adopted the RHNA plan for the 6th cycle, which fully allocates the RHNA to jurisdictions in the SCAG region. Table 1 shows the RHNA allocations for Aliso Viejo, Orange County, and the entire SCAG region.

Table 1. 6th Cycle RHNA – Aliso Viejo, Orange County and SCAG Region

	Aliso Viejo	Orange County	SCAG Region
Housing need allocation 2021-2029	1,195	183,861	1,341,827

Source: SCAG, 3/4/2021

The RHNA also distributes each jurisdiction's total housing need into four income categories (the extremely-low and very-low categories are combined for RHNA purposes). Aliso Viejo's 6th cycle RHNA allocation by income category is shown in Table 2.

Table 2. 6th RHNA by Income Category – Aliso Viejo

Extremely Low + Very Low	Low	Moderate	Above Moderate	Total
390	214	205	386	1,195

Source: SCAG, 3/4/2021

HCD Review

On October 18, 2021, the City received a written letter from HCD in response to the draft Housing Element Update which was submitted on August 19, 2021. Although the draft element addressed many statutory requirements, HCD found that revisions would be necessary to comply with State Housing Element Law. The proposed draft Housing Element Update has been amended based upon HCD's review. A summary of HCD's comments and city responses (attached as "Exhibit C" of the Resolution), outlines how the element has been revised to address each of HCD's comments. One of the issues to be addressed was how the City will accommodate its fair share of regional housing needs as assigned through the RHNA process and is discussed in further detail below.

Available Sites Analysis

The Housing Element must provide an evaluation of the city's capacity for additional housing based on land use patterns, development regulations, other development constraints (such as infrastructure availability and environmental conditions) and real estate market trends. The analysis must be prepared at a parcel-specific level of detail and identify properties (or "sites") where additional housing could be built consistent with City regulations. This evaluation is referred to as the "sites analysis" and State law requires the analysis to demonstrate that the city has adequate capacity to fully accommodate its RHNA allocation in each income category. If the sites analysis does not demonstrate that adequate capacity exists to fully accommodate the RHNA, the Housing Element must describe what steps will be taken to increase capacity consistent with the RHNA – typically through amendments to land use and zoning regulations that could facilitate additional housing development. Such amendments typically include increasing the allowable residential density or allowing housing to be built in areas that are currently restricted to only non-residential land uses.

Aliso Viejo is fully developed and with little vacant land suitable for new housing. Therefore, the City's RHNA allocation must be satisfied through redevelopment of properties that have potential for housing or mixed use (i.e., a combination of housing and commercial uses on the same property). As part of the available sites analysis process, staff studied development options such as mixed-use, construction of accessory dwelling units (ADUs), and rezoning of office properties. As part of the community outreach process, a survey was conducted on the City website which included questions regarding development type preferences that would meet the State-mandated RHNA. The responses received by the public suggested that the development type which seemed to be the most favorable was the repurposing of office sites to accommodate a mix of uses. Staff prepared a list of potential sites that could be rezoned to accommodate residential land use and brought forth the list of sites to City Council for discussion at a study session held on May 19, 2021. Based on the study session discussion, the Housing Element identifies sites that may be suitable for residential development.

Candidate Sites for Residential Development

Site	Current Zoning	Total Acreage	Potential Density (du/ac)	Potential Units (Average)
1 Columbia	BP-2	2 acres	20-30	60
41 Columbia	BP-2	2 acres	20-30	60
35 Journey	BP-1	2 acres	20-30	60
26800-26880 Aliso Viejo Parkway	BP-1	7 acres	20-30	210

The Commons	SP-2	9.9 acres	50	637
AVTC Gateway	CT	7.2 acres	50	210
TOTAL UNITS				1,237
RHNA				1,195

In addition, the City estimates the construction of five (5) ADUs over the eight (8) year planning period based on development trends. In order to accommodate the additional units to meet RHNA, amendments to land use and zoning regulations which would create the required capacity will need to be accomplished within the first three (3) years following adoption of the Housing Element, as required by State law.

Public Outreach

On May 19, 2021, a City Council study session was conducted to discuss the Housing Element Update process. On June 5, 2021, City staff hosted a booth at the local Farmer's Market to distribute information regarding the Housing Element Update process and to gather feedback from the public. On August 18, 2021, the City Council held a public meeting to consider the draft Housing Element and receive public comment. On November 3, 2021, in compliance with Senate Bill (SB) 18, City staff notified local tribes identified by the Native American Heritage Commission (NAHC) to give an opportunity to provide input on the Housing Element Update. To date, one tribe expressed their interest in providing tribal consultation. Staff has attempted to schedule the consultation but has not received a response from the tribe representative.

On January 12, 2022, staff conducted an informal online workshop to give the public the opportunity to provide input on the Housing Element Update. Public notices were provided on the City's website, social media sites and mailed to interested parties for each of these meetings. In addition, an online survey was conducted in May of 2021 inviting community members to give input on housing issues. Staff also conducted meetings with various community organizations such as the Kennedy Commission and Welcoming Neighbors Home to engage in discussions regarding housing needs for the community. Staff received copies of letters addressed to HCD from these community organizations and a resident of Aliso Viejo in response to the draft Housing Element. These letters are included as Attachment 3. Valuable input was received from all of the various public outreach conducted and comments and changes were incorporated into the draft Housing Element Update as appropriate. A matrix of the public comments received and the City's response to each comment was prepared and is included as Attachment 4.

Next Steps

Following City Council action at its January 19th meeting, City staff will transmit the revised Draft Housing Element to HCD for review. Staff will report back to the City Council with

any required actions as a result of HCD's review. Staff will also begin the process to rezone the properties to conform with the adopted Housing Element.

Environmental:

This amendment to the City's General Plan is exempt from California Environmental Quality Act (CEQA) requirements per Section 15061, Review for Exemption of the CEQA Guidelines. Specifically, Section 15061(b)(3) states, in part, that a project is exempt from CEQA if "the activity is covered by the general rule that CEQA applies only to projects which have the potential for causing a significant effect on the environment. Where it can be seen with certainty that there is no possibility that the activity in question may have a significant effect on the environment, the activity is not subject to CEQA." The 2021-2029 Housing Element would not result in any direct or indirect physical changes to the environment. The Housing Element Update is strictly a policy document and does not provide entitlements to any specific land use projects. The Housing Element Update does not make any changes to the Aliso Viejo General Plan land use map and would not modify any land use designations, allowed densities, or land use intensities established by the General Plan. Therefore, the proposed project is exempt from CEQA pursuant to State CEQA Guidelines, section 15061.

Public Notice:

On January 6, 2022, a public hearing notice was published in the Aliso Viejo News and mailed to property owners of the sites identified in the Housing Element and to interested parties who requested to be notified on Housing Element Update matters.

Attachments:

1. Resolution for Planning Application PA21-019 (GPA) including:
   Exhibit "A" - Revised 2021-2029 Draft Housing Element Update – Housing Plan (with redline changes)
   Exhibit "B" - Revised 2021-2029 Draft Housing Element Update – Community Profile (with redline changes)
   Exhibit "C" - HCD Comments and City Responses
2. Letter from HCD dated October 18, 2021
3. Public correspondence to HCD regarding the City's draft Housing Element Update
4. Matrix of City Responses to Public Comments
5. Presentation

RESOLUTION NO. 2022- ____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, CALIFORNIA, ADOPTING GENERAL PLAN AMENDMENT PA21-019 (GPA) FOR THE 2021-2029 GENERAL PLAN HOUSING ELEMENT

WHEREAS, on April 21, 2004, the City Council adopted its first Housing Element as part of its comprehensive General Plan; and

WHEREAS, the Department of Housing and Community Development ("HCD") certified the City's 2004 Housing Element for the 2000-2005 planning period; and

WHEREAS, pursuant to California Government Code section 65588, each local government is required to periodically review and update its housing element. The current housing element cycle covers the planning period of 2021-2029; and

WHEREAS, in accordance with state law, the Southern California Association of Governments ("SCAG") found that the City's share of the region's housing need for the 2021-2029 projection period was 1,195 units ("RHNA Allocation"); and

WHEREAS, of the 1,195 units, 390 units are designated for extremely low and very low-income households, 214 units are for low-income households, 205 units are for moderate-income households and 386 are for above moderate-income households; and

WHEREAS, the City must identify sites that can accommodate its share of the RHNA Allocation; and

WHEREAS, the City may amend its General Plan pursuant to Government Code Sections 65350 et seq. and Aliso Viejo Zoning Code Chapter 15.78; and

WHEREAS, the City desires to amend its General Plan to incorporate a Housing Element Update (which consists of an updated Housing Plan and Community Profile) that would bring the City's Housing Element into compliance with the requirements of state housing element law for the 2021-2029 planning period and would reflect its goals for satisfying its most recent RHNA Allocation (the "Housing Element Update"); and

WHEREAS, on May 19, 2021, the City of Aliso Viejo City Council conducted a public study session to solicit comments from all interested members of the public regarding the Housing Element Update; and

WHEREAS, on August 18, 2021, the City of Aliso Viejo City Council held a publicly noticed meeting considered public input and recommendations presented by staff in the Agenda Report and oral presentation relating to the proposed Planning Application PA21-019 (GPA) Housing Element Update; and

WHEREAS, based on testimony received on August 18, 2021, the City Council voted to direct staff to submit the Draft 2021-2029 Housing Element Update to HCD; and

WHEREAS, on August 19, 2021, the Draft Housing Element was submitted for review to HCD pursuant to Government Code Sec. 65585(b); and

WHEREAS, on October 18, 2021, HCD issued a letter reporting its findings on the Draft 2021-2029 Housing Element Update pursuant to Government Code Sec. 65585(d); and

WHEREAS, the Draft 2021-2029 Housing Element Update has been revised to address the findings of HCD; and

WHEREAS, on January 19, 2022, the City Council held duly noticed public hearing as prescribed by law to consider public testimony, evidence, HCD findings and staff recommendations regarding the Draft 2021-2029 Housing Element Update; and

WHEREAS, the City has reviewed the proposed Project and has determined that it is Categorically Exempt from environmental review under the California Environmental Quality Act ("CEQA") pursuant to CEQA Guidelines Sections Section 15061 (Common Sense Exemption); and

WHEREAS, all other legal prerequisites to the adoption of this Resolution have occurred.

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, DOES HEREBY RESOLVE, DECLARE, DETERMINE AND ORDER AS FOLLOWS:

SECTION 1. Determination of Recitals. The City Council hereby finds and determines that all of the recitals set forth above are true and correct. The above recitals are hereby incorporated as substantive findings of this Resolution.

SECTION 2. Compliance with CEQA. The City Council finds the proposed project categorically exempt from the California Environmental Quality Act (CEQA) pursuant to Section 15061(b)(3) which states, in part, that a project is exempt from CEQA if "the activity is covered by the general rule that CEQA applies only to projects which have the potential for causing a significant effect on the environment. Where it can be seen with certainty that there is no possibility that the activity in question may have a significant effect on the environment, the activity is not subject to CEQA." The 2021-2029 Housing Element would not result in any direct or indirect physical changes to the environment. The Housing Element Update is strictly a policy document and does not provide entitlements to any specific land use projects. The Housing Element Update does not make any changes to the Aliso Viejo General Plan land use map and would not modify any land use designations, allowed densities, or land use intensities established by the General Plan. Therefore, the proposed project is exempt from CEQA pursuant to State CEQA Guidelines, section 15061.

SECTION 3. Findings. The City Council approves Planning Application PA21-019 (GPA) Housing Element Update on the basis of the following findings, which are made in light of the entire record, including all written and oral evidence presented to the City Council as legislative body:

1. *Public Welfare. Approval of the amendment will not create conditions materially detrimental to the public health, safety and general welfare.*

   Pursuant to state law, every jurisdiction in California must adopt a General Plan, and every General Plan must contain a Housing Element. The proposed amendment to the City General Plan Housing Element will support an adequate supply of housing, including Aliso Viejo's share of the region's new housing need for the 2021-2029 planning period as established by the Southern California Association of Governments. The amendment will make way for new residential development opportunities in the City in an environmentally responsible manner. Therefore, the proposed amendment will not create conditions materially detrimental to the public health, safety and general welfare.

2. *Internal General Plan Consistency. The amendment is internally consistent with those goals, objectives, and policies of the General Plan which are not being amended.*

   State planning law requires the Housing Element to be consistent with other General Plan elements. The Housing Element most closely relates to the Land Use Element and is consistent with all elements of the General Plan. Development policies contained in the Land Use Element, which establishes the location, type, density, and distribution of local land uses, including housing, most directly relate to the Housing Element. The Housing Element Housing Plan and Community Profile are consistent with the other elements of the General Plan. Specifically, the Housing Element amendment is consistent with:

   a) The Housing Element: The proposed Housing Element amendment replaces the existing Housing Element in its entirety. All policies and program recommendations within this Housing Element have been analyzed to determine the appropriateness of retention and/or implementation.

   b) The Land Use Element: The proposed General Plan Amendment is consistent with the Land Use Element for the following reasons:

      The General Plan's Land Use Goal (LU-1) seeks to provide a diverse mix of land uses to meet the future needs of all residents and the business community. This amendment to the Housing Element advances this goal by first providing a description of the residents; the most recent population characteristics, age characteristics, race and ethnicity, occupation and labor participation, household type, household size, household income and overpayment, overcrowding, special needs populations, housing stock, housing age and condition, housing tenure and

vacancy, housing costs and affordability, and at risk rental housing. Secondly, the amendment advances the goal by describing the resources and opportunities available to meet the needs of the residents.

Goal LU-3 encourages development that provides a solid fiscal foundation for the City. The sites which would be affected by the in the implementation of Program 1 of the Housing Element are located within close proximity to retail and commercial establishments demanded by residents. Specifically, Program 1 of the Housing Element will advance this goal by expanding residential development opportunities that would contribute to the City's tax base. The Housing Element Update will help to promote Aliso Viejo as an employment center by providing adequate housing for employees of national, regional, and local businesses headquartered in Aliso Viejo. The Update will encourage innovative mixed-use, pedestrian-friendly development projects that reduce traffic congestion and improve quality of life.

c) The Circulation Element: The proposed amendment to the Housing Element is consistent with the Circulation Element for the following reasons:

The General Plan's Circulation Element Goal (C-2) seeks to maintain an effective regional transportation network. Potential residential sites throughout the City are adjacent to major arterial roadways and bus transit facilities, which will give residents multi-modal access throughout Aliso Viejo and the surrounding region.

d) The Noise Element: The proposed amendment to the Housing Element is consistent with the Noise Element for the following reasons:

The General Plan's Noise Element Goal (N-1) seeks to minimize the impact of point source noise and ambient noise levels throughout the community. Per Program 7 of this amendment to the Housing Element the City's Code Enforcement staff will continue to enforce property maintenance standards and adopted City Building and Zoning codes which include the noise ordinance. The City will promote the importance of maintenance to long-term housing quality and property values, and encourage community and neighborhood involvement. The City will ensure that construction and occupancy of higher-density residential developments are compatible with and do not exceed thresholds defining the acceptable noise environment in surrounding areas. Furthermore, an applicant seeking to develop a prospective residential site will be required to obtain a site development permit subject to the City's and the Aliso Viejo Community Association's stringent standards for noise mitigation.

Goal N-2 seeks to minimize transportation-related noise impacts. This amendment to the Housing Element will encourage the use of alternative transportation technologies that minimize noise impacts. Due to the proximity of the urban core and resource centers of the City to potential residential development sites, this amendment to the Housing Element will enable residents

to access the City's commercial center, schools, and business parks by walking in addition to a variety of alternative transportation technologies.

e) The Conservation and Open Space Element: The proposed amendment to the Housing Element is consistent with the Conservation and Open Space Element for the following reasons:

The General Plan's Conservation/Open Space Element Goal (COS-5) seeks to improve air quality within Aliso Viejo and the region. This amendment to the Housing Element will support this goal by enabling residents to live, work, and recreate within a small radius. Developing residential units in close proximity to commercial resource centers, schools, and churches will reduce emissions related to vehicular travel.

Goal COS-7 seeks to ensure the long-term provision of open spaces and expansion of parks and recreational opportunities within the community. This amendment to the Housing Element will increase the potential development of the number of residential units available to the City at a higher number of dwelling units per gross acre of land. This increase in density will satisfy demand for dwelling units without threatening the preservation of existing open spaces and expansion of parks and recreational opportunities needed to serve additional residents in the immediate and distant future.

f) The Safety Element: The proposed amendment to the Housing Element is consistent with the Safety Element for the following reasons:

The General Plan's Safety Element Goal (S-2) seeks to protect the community from wildland fires. This amendment to the Housing Element would encourage development of residential structures in compliance with the City's and Aliso Viejo Community Association's stringent site design and maintenance standards. The density and location of the sites are anticipated to be in within close proximity to the Orange County Fire Authority's facilities, which would support the Authority's efforts to reduce fire risks through public education.

Goal S-4 seeks to protect the community from hazards associated with air pollution, hazardous materials, and nuclear power production. This designation will support the efforts of federal, state, and county agencies to decrease air pollution emissions occurring within the air basin. This amendment to the Housing Element will potentially increase the inventory of residential products available in Southern California that are within close proximity of commercial resource centers and employment centers.

Goal S-5 seeks to safeguard the community from criminal activity and structural fire hazards. This amendment to the Housing Element would enable local law enforcement and fire protection services to be responsive to the City's residents by developing sites within close proximity to law enforcement and fire prevention

authorities. Both the Orange County Sheriff and Orange County Fire Authority have adequate facilities and personnel throughout the City. The proximity of these agencies and their resources will reduce the risk of criminal activity and structural fires at the sites with a potential for residential development.

Thus, this proposed amendment to the Housing Element is internally consistent with the goals and policies of other elements of the City's General Plan.

3. Land Use Compatibility.

The adoption of the Housing Element Update makes no changes to the General Plan Land Use Policy Map. The proposed Housing Element Update does not entitle, propose, or otherwise require the construction of new development or rehabilitation of existing development, but rather includes goals and policies to facilitate the development, preservation, and rehabilitation of housing consistent with existing and proposed uses identified in the Aliso Viejo General Plan and as mandated to be allowed under State law.

4. Property Suitability.

As part of the available sites analysis process, development options such as mixed-use, construction of accessory dwelling units (ADUs), and rezoning of office properties were identified due to Aliso Viejo being fully developed with little vacant land suitable for new housing. The City's RHNA allocation must be satisfied through redevelopment of properties that have potential for housing or mixed use. The sites identified in the Housing Element Update present opportunities for new residential development and are suitable for redevelopment. Any future housing development projects will be subject to separate entitlement review.

SECTION 4. Transmit Housing Element to HCD. Staff is hereby directed to transmit the adopted 2021-2029 Housing Element Update, which includes the Housing Plan (Exhibit "A" to this Resolution) and Appendix C, Community Profile (Exhibit "B" to this Resolution), to HCD. The City Manager is further directed to make any technical or clerical revisions to the Housing Plan or Community Profile as necessary to facilitate a finding from HCD that the element substantially complies with the requirements of state law.

SECTION 5. Filing of Notice of Exemption. The City Council hereby authorizes and directs staff to prepare, execute and file with the Orange County Clerk a Notice of Exemption for the proposed Project.

SECTION 6. Location of Documents. The administrative record for the Project is maintained at City Hall located at 12 Journey, Suite 100, Aliso Viejo, CA 92656. The custodian of records is the City Clerk.

PASSED, APPROVED AND ADOPTED this 19th day of January 2022.

_____
Ross Chun
Mayor

APPROVED AS TO FORM:

_____
Scott C. Smith
City Attorney

ATTEST:

_____
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 foregoing Resolution No. 2022-___ was duly passed and adopted by the City Council of the City of Aliso Viejo at their regular meeting held on the 19th day of January 2022, by the following roll call vote, to wit:

AYES:

NOES:

ABSENT:

_____
MITZI ORTIZ
CITY CLERK

(SEAL)

I hereby certify that the foregoing is the original of Resolution No. 2022-__ duly passed and adopted by the Aliso Viejo City Council at its regular meeting held January 19, 2022.

_____
MITZI ORTIZ
CITY CLERK

(SEAL)

EXHIBIT “A”

HOUSING PLAN

EXHIBIT “B”

COMMUNITY PROFILE

EXHIBIT “C”

HCD COMMENTS AND CITY RESPONSES

HOUSING PLAN

INTRODUCTION

Located in southwestern Orange County, Aliso Viejo is approximately bisected by Highway 73 with Laguna Beach bordering to the southwest, Laguna Woods to the north, Laguna Hills to the east, and Laguna Niguel and unincorporated County lands to the south. A primarily residential community, Aliso Viejo offers a wide variety of housing opportunities and has adequate schools, employment, shopping, parks, and open space for the recreation and leisure needs of its residents.



The Aliso Viejo Planned Community, which comprises the majority of the City, began development in the early 1980s. Following rapid growth in the 1980s and 1990s, residential portions of the planning area reached build-out soon after the City's incorporation on July 1, 2001, becoming the 34th city in Orange County.

At the time of incorporation in 2001, the City's vacant or underutilized sites were entitled with non-residential uses as specified in the Aliso Viejo Master Development Agreement approved by the County in 1988. However, with the City's adoption of its first General Plan in 2004, the opportunity for additional housing within the community became part of the General Plan process. The Community Benefit Overlay (CBO) concept, outlined in the Land Use Element, allowed modification to existing entitlements: 1) if the proposed development could be shown to provide added benefit to the community, and 2) if property owners were willing to forego or amend the 1988 entitlements under the Master Development Agreement. One such community benefit was the provision of housing affordable to very-low- and low-income households. Through the CBO mechanism, the potential for new construction of housing affordable to lower-income households was greatly increased, and the concept furthered local, regional, and state housing goals.

PURPOSE OF THE HOUSING ELEMENT

The Housing Element serves as a guide for future residential growth in Aliso Viejo and establishes a strategy for meeting the community's housing needs. The Housing Element is designed to achieve the following objectives set forth in state law:

1) Identify adequate sites for a range of housing opportunities;
2) Assist in the development of adequate and affordable housing;
3) Address constraints to meeting the City's housing needs;
4) Conserve and improve the condition of housing; and
5) Promote equal housing opportunities for all persons.

SCOPE AND CONTENT OF THE HOUSING ELEMENT

The Housing Element is a mandated component of the General Plan and satisfies the requirements of State planning law. The Housing Element contains two parts – the Housing Plan and the Community Profile. The Housing Plan has three sections: 1) Introduction; 2) Issues, Goals and Policies; and 3) Housing Programs. In the Issues, Goals and Policies section, potential housing issues are identified and discussed, and goals and policies are established to address these issues. The Housing Plan describes how the goals and policies will be achieved and implemented.

The Community Profile, contained in the General Plan as Appendix C, and part of the Housing Element, analyzes community demographics and housing stock characteristics, potential constraints to housing development, and identifies resources to meet the community's housing needs.

RELATIONSHIP TO OTHER GENERAL PLAN ELEMENTS

California planning law requires the Housing Element to be consistent with other General Plan elements. Development policies contained in the Land Use Element, which establish the location, type, density, and distribution of land uses, including housing, support the goals of the Housing Element by identifying suitable locations for a variety of housing types.

All policies and programs within this Housing Element have been analyzed and found to be consistent with the other elements of the General Plan. When future General Plan amendments are proposed, the City will evaluate other elements, including the Housing Element, to ensure consistency is maintained.

PUBLIC PARTICIPATION

Public participation is an important component of the Housing Element update process. Government Code §65583(c)(8) states that "The local government shall make diligent effort to achieve public participation of all the economic segments of the community in the development of the housing element, and the program shall describe this effort." Public participation played an important role in the formulation and refinement of the City's housing goals and policies.

City residents and many other interested parties were encouraged to participate in the Housing Element update process and to identify housing issues of concern, recommend strategies, review the draft element, and provide recommendations to decision-makers.

Please refer to Appendix C-6 for a summary of the Housing Element public participation program.

~~A Housing Element web page was established to provide interested persons with information including Frequently Asked Questions, meeting announcements, reference materials, and also included an online survey regarding housing needs in the community.~~

~~Persons and organizations representing the interests of lower-income households and persons with special needs, as well as affordable housing developers, were specifically targeted in the City's notification list (Table H-1).~~

~~The following public meetings were conducted regarding the 2021 Housing Element update:~~

~~May 19, 2021 City Council study session~~

~~August 18, 2021 City Council public meeting~~

~~City Council public hearing~~

~~Notices of all public meetings were posted on the City's website, and also mailed to all persons and organizations on the Housing Element interest list in advance of each meeting. The draft Housing Element was also was posted on the Housing Element website and made available for review at City Hall, and notices were also mailed to the interest list when the draft Housing Element was published.~~

~~Table H-1~~
~~Housing Element Notification List~~

~~Kennedy Commission~~
~~17701 Cowan Ave., Suite 200~~
~~Irvine, CA 92614~~

~~League of Women Voters~~
~~PO Box 1065~~
~~Huntington Beach, CA 92647~~

~~OC Association of Realtors~~
~~25552 La Paz Road~~
~~Laguna Hills, CA 92653~~

~~Public Law Center~~
~~601 Civic Center Drive West~~
~~Santa Ana, 92701~~

~~Habitat for Humanity of Orange County~~
~~2200 S. Ritchey St.~~
~~Santa Ana, CA 92705~~

~~Jamboree Housing Corp.~~
~~17701 Cowan Avenue~~
~~Suite 200~~
~~Irvine, CA 92614~~

~~The Related Companies of California~~
~~18201 Von Karman Ave Ste 900~~
~~Irvine, CA 92612~~

~~Community Housing Resources, Inc.~~
~~17701 Cowan Avenue, Suite 200~~
~~Irvine, CA 92614~~

~~South County Outreach~~
~~26776 Vista Terrace~~
~~Lake Forest, CA 92630~~

~~Dayle McIntosh Center~~
~~South County Branch~~
~~24012 Calle De La Plata # 110~~
~~Laguna Hills, CA 92653~~

~~OC Housing Providers~~
~~25241 Paseo de Alicia, Suite 120~~
~~Laguna Hills, CA 92653~~

~~Brittany Irvin~~
~~Province Group~~
~~26 Corporate Plaza #260~~
~~Newport Beach, CA 92660~~

~~OC Business Council~~
~~2 Park Plaza, Suite 100~~
~~Irvine, CA 92614~~

~~OC Housing Trust~~
~~198 W. Lincoln Ave., 2nd Floor~~
~~Anaheim, CA 92805~~

~~Neighborhood Housing Services of Orange County~~
~~198 W. Lincoln Ave., 2nd Floor~~
~~Anaheim, CA 92805~~

~~BIA/OC~~
~~17744 Sky Park Circle #170~~
~~Irvine, CA 92614~~

~~City of Laguna Woods~~
~~Attn: Community Development Director~~
~~24264 El Toro Road~~
~~Laguna Woods, CA 92637~~

~~City of Laguna Hills~~
~~Attn: Community Development Director~~
~~24035 El Toro Rd~~
~~Laguna Hills, CA 92653~~

~~City of Mission Viejo~~
~~Attn: Community Development Director~~
~~200, Civic Center~~
~~Mission Viejo, CA 92691~~

~~Community Outreach Coordinator~~
~~Regional Center of Orange County~~
~~P.O. Box 22010~~
~~Santa Ana, CA 92702-2010~~

~~City of Laguna Niguel~~
~~Attn: Community Development Director~~
~~30111 Crown Valley Pkwy~~
~~Laguna Niguel, CA 92677~~

~~City of Laguna Beach~~
~~Attn: Community Development Director~~
~~505 Forest Ave.~~
~~Laguna Beach, CA 92651-2394~~

~~Dan Schmid~~
~~Welcoming Neighbors Home~~
~~23676 Birtcher Dr.~~
~~Lake Forest, CA 92630~~

~~Moulton Niguel Water District~~
~~P.O. Box 30203~~
~~Laguna Niguel, CA 92607~~

~~South Orange County Wastewater Authority~~
~~34156 Del Obispo Street~~
~~Dana Point, CA 92629~~

~~El Toro Water District~~
~~24521 Los Alisos Boulvard~~
~~Lake Forest, CA 92630~~

~~Brandon Young~~
~~Mitchell M. Tsai, Attorney At Law~~
~~155 South El Molino Ave, Ste. 104~~
~~Pasadena, CA 91101~~



ISSUES, GOALS, AND POLICIES

The goals, policies, and implementation programs of the Housing Element address three Citywide issues:

1) Providing opportunities for a variety of housing;
2) Maintaining quality neighborhoods and housing units that meet the needs of all income groups; and
3) Assisting special needs households and ensuring fair housing practices.

VARIETY OF HOUSING OPPORTUNITIES

Housing needs vary depending on many factors, such as age, income, family type, household size, and mobility. A well-balanced community includes a variety of housing options. Providing a range of housing opportunities helps ensure that households of all types and sizes can find a home in Aliso Viejo that suits their needs.

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.
Policy H-1.2	Encourage through the use of density bonuses and rezoning to allow for residential development, development of affordable housing opportunities throughout the community, as well as development of housing for elderly and low- and moderate-income households near public transportation services.
Policy H-1.3	Identify physical, legal, economic, and other constraints to the development of housing and collaborate with other public and private agencies to overcome such factors.
Policy H-1.4	Ensure that a portion of future residential development is affordable to low- and very-low-income households by designating certain sites as having the potential to be used for residential uses.

Policy H-1.5 Encourage development of mixed-use neighborhoods that incorporate all levels of housing with commercial and business park development in existing and future developments.

Policy H-1.6 Encourage the use of grant funds to purchase available residential units in order to increase the supply of rental and ownership units that are affordable to low- and moderate-income households.

HOUSING AND NEIGHBORHOOD PRESERVATION

Housing and neighborhood preservation addresses two important issues: 1) improving the condition of Aliso Viejo's residential stock and neighborhoods; and 2) maintaining the supply of affordable housing. The first aspect of housing and neighborhood preservation is to provide a safe and aesthetically pleasing living environment. Improving the character of Aliso Viejo's neighborhoods also influences property values and overall quality of life. The other aspect of housing and neighborhood preservation is ensuring that access to affordable housing opportunities for lower-income households is provided throughout the community.

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

Policy H-2.1 As the City matures, maintain the quality of the housing stock through code enforcement as well as appropriate coordination with homeowner associations with regards to on-street parking, landscape maintenance, and water quality.

Policy H-2.2 Promote increased awareness of the importance of property maintenance to long-term housing quality and property values, and encourage community and neighborhood involvement in neighborhood preservation through public information and awareness, the Aliso Viejo Community Association (AVCA), City newsletters, e-news, cable television, and informational brochures at the public counter at City Hall.

Policy H-2.3 Work to preserve the affordability of publicly assisted and privately-financed housing units and to discourage their conversion to market-rate housing by requiring condominium conversions to provide very-low- and low-income units, with a focus on units that currently are or were previously affordable units that may have expired or are at risk of expiring.

AFFIRMATIVELY FURTHERING FAIR~~EQUAL ACCESS TO~~ HOUSING

The City seeks to expand the range of housing opportunities provided in Aliso Viejo, including housing for seniors on fixed incomes, lower and moderate income residents (including extremely low income households), the disabled, large families, female-headed households with children, and the homeless. In order to make adequate provision for the housing needs of all segments of the community, the City must ensure equal and fair housing opportunities are available to all residents.~~Special circumstances may impede some persons and households from finding decent, affordable housing. The City has a responsibility to ensure that all persons have access to housing, regardless of race, religion, gender, familial status, marital status, national origin, color, age, disability, or source of income. To ensure that all groups have equal access to housing, the City should ensure the continuation of unimpeded access to a full range of housing opportunities.~~

Goal H-3a	Ensure that all persons and household types have equal ~~access to~~ housing opportunities regardless of their special characteristics as protected under State and Federal fair housing laws.
Goal H-3b	Increase the supply of affordable housing in high opportunity areas.
Goal H-3c	Prevent displacement of low- and moderate-income residents with protected characteristics.
Goal H-3d	Increase community integration for persons with disabilities.
Goal H-3e	Ensure equal access to housing for persons with protected characteristics, who are disproportionately likely to be lower-income and to experience homelessness.
Goal H-3f	Expand access to opportunity for protected classes.
Goal H-3g	Collaborate with regional and local organizations.

Policy H-3.1	Affirmatively further fair housing and promote equal housing opportunities for persons of all socioeconomic segments of the community.
Policy H-3.2	Promote housing along with supportive services to meet the special housing needs of seniors, homeless individuals, and families, and the disabled.
Policy H-3.3	Encourage the provision of housing to meet the needs of families of all sizes.

Policy H-3.4	Facilitate increased participation among traditionally underrepresented groups in the public decision-making process.
Policy H-3.5	Provide increased outreach and education for the broader community of residents, residential property owners and operators regarding fair housing practices and requirements, especially through non-traditional media.
Policy H-3.6	Using best practices from other jurisdictions, explore policies and programs that increase the supply affordable housing, such as linkage fees, housing bonds, inclusionary housing, public land set-aside, community land trusts, transit-oriented development, and expedited permitting and review.
Policy H-3.7	Explore the use of CDBG funds and other grants to provide low-interest loans to single-family homeowners and grants to homeowners with household incomes of up to 80% of the Area Median Income to develop accessory dwelling units with affordability restriction on their property.
Policy H-3.8	Review existing zoning policies and explore zoning changes to facilitate the development of affordable housing.
Policy H-3.9	Align zoning codes to conform to recent California affordable housing legislation.
Policy H-3.10	Explore piloting a Right to Counsel Program to ensure legal representation for tenants in landlord-tenant proceedings, including those involving the application of new laws like AB 1482.
Policy H-3.11	Conduct targeted outreach and support to persons with disabilities, including individuals transitioning from institutional settings and individuals who are at risk of institutionalization. As part of that assistance, maintain a database of housing that is accessible to persons with disabilities.
Policy H-3.12	Consider adopting the accessibility standards adopted by the City of Los Angeles, which require at least 15 percent of all new units in city-supported Low-Income Housing Tax Credit (LIHTC) projects to be ADA-accessible with at least 4 percent of total units to be accessible for persons with hearing and/or vision disabilities.
Policy H-3.13	Consider incorporating a fair housing equity analysis into the review of significant rezoning proposals and specific plans.

Policy H-3.14	Study and make recommendations to improve and expand Orange County's public transportation to ensure that members of protected classes can access jobs in employment centers.
Policy H-3.15	Increase support for fair housing enforcement, education, and outreach.
Policy H-3.16	In collaboration with the Orange County Housing Authority (OCHA): a) Attend quarterly OCHA Housing Advisory Committee to enhance the exchange of information regarding the availability, procedures, and policies related to the Housing Assistance Voucher program and regional housing issues. b) Support OCHA's affirmative fair marketing plan and de-concentration policies by providing five-year and annual PHA plan certifications. c) In coordination with OCHA and fair housing services provider, conduct landlord education campaign to educate property owners about State law prohibiting discrimination based on household income.
Policy H-3.17	Through the City's fair housing contractor: a) Provide fair housing education and information to apartment managers and homeowner associations on why denial of reasonable modifications/accommodations is unlawful. b) Conduct multi-faceted fair housing outreach to tenants, landlords, property owners, realtors, and property management companies. Methods of outreach may include workshops, informational booths, presentations to community groups, and distribution of multi-lingual fair housing literature.
~~Policy H-3.1~~	~~Identify and participate in programs and provide incentives through density bonuses and rezoning to encourage residential projects that include housing for seniors, low- and moderate-income groups, or special needs groups.~~
~~Policy H-3.2~~	~~Encourage the provision of housing and services for special needs groups, such as the homeless, the disabled, and victims of domestic violence by providing City grants to agencies providing services to persons in these groups.~~

~~Policy H-3.3~~ ~~Collaborate with developers, landlords, home-seekers, tenants, real estate and lender groups, and other private for-profit and non-profit agencies to ensure that individuals and families seeking housing in Aliso Viejo are not discriminated against.~~

~~Policy H-3.4~~ ~~Maintain a variety of housing types that complement the employment opportunities within the community and encourage a jobs/housing balance, provided that the City's long-range fiscal land use objectives are met.~~

HOUSING PROGRAMS

This Housing Plan identifies specific action programs the City will implement to further its housing goals and policies during the 2021-2029 planning period. The programs, arranged under four headings and presented in numerical order, are designed to accomplish the following:

- Identify adequate sites to maintain a variety of housing opportunities;
- Conserve and improve the existing housing stock;
- Facilitate the development and maintenance of affordable housing;
- Address and remove unnecessary governmental constraints; and
- Ensure equal housing opportunity.

~~HOUSING POLICY MAP~~

~~The Housing Policy Map (Figure H-1) depicts the locations having potential for future housing development during this planning period (see also Appendix C and Housing Program 1, *Adequate Sites for Affordable Housing*.~~

VARIETY OF HOUSING OPPORTUNITIES

1. Adequate Sites for New Housing

Aliso Viejo's share of the region's new housing need for the 2021-2029 planning period as established by the Southern California Association of Governments (SCAG) in the Regional Housing Needs Assessment (RHNA) is 1,195 units. Of these, 390 units are designated for very-low-income households, 214 are for low-income households, 205 are for moderate-income households, and 386 are for above-moderate-income households.

State law requires cities to identify adequate sites with appropriate zoning to accommodate the additional housing need for the planning period. In compliance with the requirements of state law, the City will carry out the actions described below in order to identify and rezone adequate sites commensurate with its housing need during the planning period.

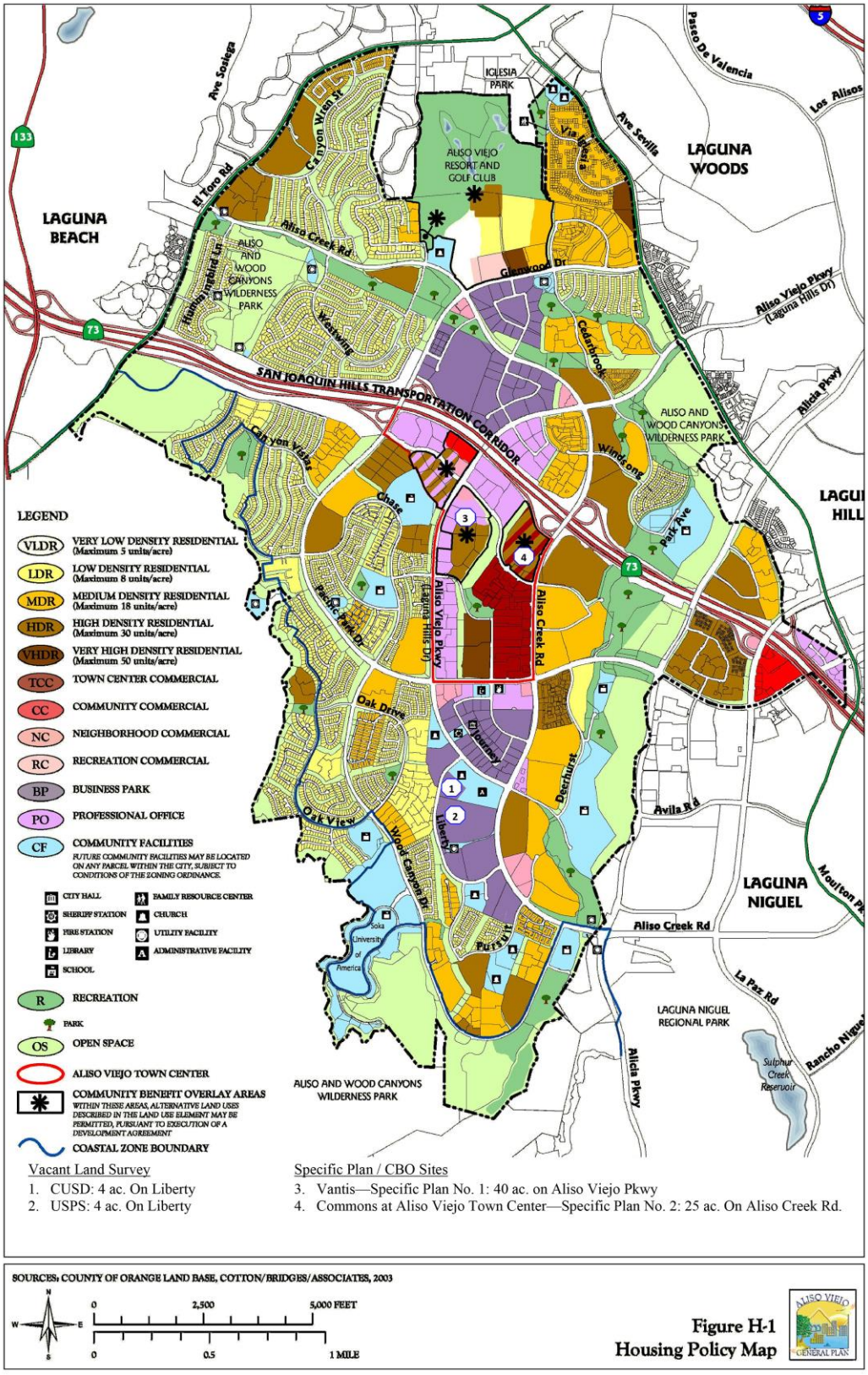


Figure H-1
Housing Policy Map

- ❖ Within the first three years of the planning period, the City will process amendments to the General Plan and zoning regulations to accommodate 100% of the shortfall of potential lower-income housing units to accommodate the RHNA allocation as identified in Table CP-25. Sites to be rezoned shall be selected from the candidate sites listed in Table CP-26 and shall comply with the provisions of *Government Code* §65583.2.h and §65583.2.i.
- ❖ City staff will provide assistance to applicants for housing developments on sites to be rezoned during the review process.
- ❖ The City will facilitate affordable multi-family development on these sites by supporting funding applications, allocating funds from the Affordable Housing Trust Fund, and/or approving modifications to development standards.
- ❖ The City will report annually to the California Department of Housing and Community Development on its progress in implementing this program.
- ❖ The City will monitor project approvals and comply with the *no net loss* requirements of Government Code Sec. 65863.

Timeframe:	General Plan and zoning amendments by October 2024; annual reporting
Objective:	Provide adequate sites for housing to accommodate regional needs (Table H-1)
Responsible Agency:	Planning Department
Funding Source:	General Fund; grant funds, if available

2. Facilitate the Provision of Affordable Housing

State Density Bonus law (Government Code Sec. 65915 et seq.) establishes incentives to encourage the provision of affordable housing, and Chapter 15.58 of the Zoning Code provides local regulations and procedures to implement State requirements. AB 2345 (2019) amended State law to revise density bonus incentives that are available for affordable housing developments. The City will process a Code amendment concurrent with adoption of the Housing Element to update the City's density bonus regulations in conformance with current State law.

The City has also established an affordable housing fund to assist in the provision of affordable housing. To date, the City has collected approximately $2.5 million in affordable housing in-lieu funds. The majority of the existing funds are from the Canyon Point condo conversion. The remaining balance is from a 12-unit CBO project, Ventana Ridge, as well as a small percentage from the

Glenwood and Vantis CBO projects. In 2016, the City provided a loan of $2.25 million for the construction of 198 affordable units at 100 Freedom Lane, 50 of which are at or below 50% AMI and 148 units are at or below 60% AMI.

The priority for the use of in-lieu funds will be to assist the provision of extremely-low- and very-low-income rental housing and housing for persons with special needs, which may include purchasing affordability covenants on existing rental units and/or providing incentives to non-profit developers of rental housing. These funds may also be utilized to retain affordable status on units that may require City intervention and the associated administrative costs.

In 2021, the City allocated $154,650 of affordable housing in-lieu funds to purchase a condominium unit, which is leased to a non-profit organization for use as transitional housing for homeless families.

Timeframe:	Update density bonus regulations by October 2022
Objective:	New affordable housing commensurate with regional needs (Table H-1)
Responsible Agency:	Planning Department
Funding Source:	In-Lieu Housing Fund

3. Homeownership Assistance Programs

The City recognizes the importance of providing homeownership opportunities for lower- and moderate-income households. The City will continue to monitor the availability of homeownership programs that are supported by other agencies and make this information available to prospective homeowners in Aliso Viejo. Such programs may include the Mortgage Credit Certificates, California Housing Finance Agency, mortgage revenue bonds, CDBG, and HOME.

The City will investigate the feasibility of developing its own homeownership assistance program with the use of CDBG funds (see Program 2).

Timeframe:	Annual updates to information posted on the City website
Program Objective:	Provide home buyer assistance information to potential homeowners in Aliso Viejo
Responsible Agency:	Planning Department
Funding Source:	General Fund; homebuyer assistance programs

4. Section 8 Housing Choice Vouchers

The Section 8 Housing Choice Vouchers program extends rental subsidies to very-low-income households and seniors who spend more than 30 percent of

their income on rent. The amount of subsidy is equal to the difference between the excess of 30 percent of monthly income and actual rent. The program is administered by the Orange County Housing Authority (OCHA) and funding is determined by the federal government; therefore, the City has no ability to determine the number of vouchers available in Aliso Viejo. The City will provide information regarding the Section 8 program on the City website and other locations in the City.

Timeframe:	Throughout the planning period
Program Objective:	The City will continue to promote the use of Section 8 Housing Choice Vouchers in Aliso Viejo with the objective of expanding assistance to very-low-income households. Specifically, the City will make referrals to OCHA, advertise the program on the City website and in newsletters, and distribute information at the public counter at City Hall throughout the planning period
Responsible Agency:	Orange County Housing Authority; Planning Department
Funding Source:	HUD Section 8 funds

5. OCHA Special Needs Groups Rental Assistance Program

In addition to the Section 8 Housing Choice Vouchers program, the Orange County Housing Authority (OCHA) administers rental assistance programs targeting special needs groups, including families whose children are at risk of being placed in out-of-home care, persons with disabilities, the homeless, and seniors. These programs include:

- *Family Unification*: This program provides Section 8 assistance to families whose children are at risk of being placed in out-of-home care or delayed in returning from care because of the families' inadequate housing.
- *Aftercare for Disabled*: This program provides Section 8 assistance specifically for disabled applicants.
- *Shelter Plus Care*: This program provides Section 8 assistance to homeless persons with disabilities.
- *HOPE IV - Elderly Independence*: This program provides Section 8 assistance to frail seniors.

The City has no ability to determine funding levels or the number of persons served by these programs, but will continue to promote these assistance programs on the City website and other locations.

Responsible Agency:	Planning Department
Program Objective:	Continue to assist OCHA in promoting its Special Needs Groups Rental Assistance Programs in Aliso Viejo with the objective of expanding assistance to additional households with special needs. Specifically, the City will make referrals to OCHA, advertise the program on City website and newsletters, and distribute information at the public counter at City Hall.
Timeframe:	Continuously ~~T~~throughout the planning period
Funding Source:	General Fund

6. City Grants for Special Needs Groups

The City currently provides local community assistance grants for human and social service groups, including domestic violence shelters and homelessness prevention. Since 2005, the City has provided approximately $34,000 in grants to Laura's House, a State-approved comprehensive domestic violence agency serving residents in southern Orange County. Their target population is battered women and children who are coping with the effects of domestic violence, needing emergency shelter, support, education and counseling. The City has also provided over $83,000 in community assistance grants to South County Outreach (SCO). SCO provides services that include food and rental and utility bill financial assistance to Aliso Viejo individuals and families consisting of seniors, youth, children, the disabled, unemployed and those in crisis.

In addition, the City provides non-competitive grants to after-school and senior programs. Since 2003, the City has provided Age Well Senior Services (formerly South County Senior Services), which provides adult day care for older adults with multiple chronic illnesses, with approximately $188,000 in grant funding.

On an annual basis, the City solicits community assistance grant applications from a variety of local non-profit service based organizations and the allocation of funding fluctuates depending on City budgetary constraints.

Timeframe:	Throughout the planning period
Responsible Agency:	Community Services Department
Funding Source:	General Fund
Program Objective:	The City will allocate 50% of its Human and Social Services community assistance grant budget to incorporate homelessness prevention programs, programs for the disabled, and domestic violence

support programs into the annual cycle of grant funding.

HOUSING AND NEIGHBORHOOD PRESERVATION

7. Code Enforcement

The Code Enforcement Program is operated through the City's Building Department. Code Enforcement staff responds to complaints related to substandard housing, property maintenance, overgrown vegetation, trash and debris, improper occupancy, and other nuisance and zoning complaints. In addition, the City will continue to implement and enforce the most recent provisions of the California Building Code. Where violations are identified, property owners will be referred to programs that provide financial assistance for rehabilitation.

Timeframe:	Throughout the planning period
Responsible Agency:	Building Department, Code Enforcement Division
Funding Source:	General Fund
Program Objective:	The City's Code Enforcement Staff will continue to enforce property maintenance standards and adopted City Building and Zoning codes. The City will promote the importance of property maintenance to long-term housing quality and property values, and encourage community and neighborhood involvement in neighborhood preservation through the Aliso Viejo Community Association (AVCA), City newsletters, e-news, cable television, and informational brochures at the public counter at City Hall. As opportunities become available, the City will consider directing resources to assist home rehabilitation and refer property owners to assistance programs.

8. Conservation of Existing and Future Affordable Units

Aliso Viejo has several multi-family housing projects with units affordable to households earning lower incomes. None of these is at risk of converting to market-rate housing during this Housing Element period. Should there be a change in the status of these housing projects, the City will monitor the deed restrictions or affordability covenants of affordable housing and pursue options to preserve the affordable housing units.

Timeframe:	Throughout the planning period
Responsible Agency:	Planning Department
Funding Source:	General Fund
Program Objective:	Annually, the City will monitor the status, notify residents of potential conversion to market rate housing, and pursue options to preserve the units.

REDUCE GOVERNMENTAL CONSTRAINTS TO HOUSING

9. Streamlined Residential Permit Processing

In order to facilitate affordable housing development, the City will offer streamlined priority processing for applications that include affordable units. Assistance will include pre-filing meetings to clarify application requirements, expedited review of application materials, and administrative assistance with grant funding applications. The City will also process a Zoning Code amendment establishing SB 35 review procedures and objective standards for qualifying projects, and post zoning, development standards, and fees on the City's website.

Timeframe:	Throughout the planning period; Zoning Code amendment by October 2022
Responsible Agency:	Planning Department
Funding Source:	General Fund
Program Objective:	Minimize permit processing time to reduce development costs for affordable housing.

10. Housing for Persons with Special Needs~~Transitional/Supportive Housing, Emergency Shelters and Low Barrier Navigation Centers~~

Transitional housing, supportive housing, emergency shelters and low barrier navigation centers help to address the needs of persons who are homeless or at risk of becoming homeless.

Emergency shelters provide short-term aid to persons who are homeless and involve limited supplemental services. Transitional and supportive housing, in contrast, is directed at removing the basis for homelessness. Transitional and supportive housing is provided for an extended period of time and may be combined with other supportive services to assist in the transition from homelessness to self-sufficiency.

AB 2162 (2018) amended State law to require that supportive housing be a use by-right in zones where multi-family and mixed uses are permitted, including non-residential zones permitting multi-family uses if the proposed housing development meets specified criteria. AB 101 (2019) added the requirement that

low barrier navigation centers meeting specified standards be allowed by-right in areas zoned for mixed use and in non-residential zones permitting multi-family uses pursuant to Government Code Sec. 65660 et seq. AB 139 (2019) modified State law regarding parking standards for emergency shelters. The City is currently processing ~~a~~ Code amendments to address these requirements~~allow supportive housing and low barrier navigation centers~~ consistent with State law.

Residential care facilities provide 24-hour non-medical care of persons in need of personal services, supervision, or assistance essential for sustaining the activities of daily living. The City will review current zoning regulations for such facilities and amend regulations to ensure conformance with applicable law.

Consistent with the Employee Housing Act (Health and Safety Code Section 17021.5) agricultural employee housing for six or fewer employees shall be treated as a single-family structure and permitted in the same manner as other dwellings of the same type in the same zone. An amendment to the Zoning Code will be processed in compliance with this requirement.

Timeframe:	Code amendments ~~in~~by October 202~~1~~2
Responsible Agency:	Planning Department
Funding Source:	General Fund
Program Objective:	Encourage the provision of transitional/supportive housing, emergency shelters, ~~and~~ low barrier navigation centers and agricultural employee housing consistent with State law.

11. Accessory Dwelling Units

Accessory dwelling units (ADUs) provide an important source of affordable housing for seniors, young adults and other low- and moderate-income households. Section 15.14.080 of the Zoning Code contains regulations and procedures for accessory residential units (ADUs) and junior accessory dwelling units (JADUs). The City will continue to monitor changes to State ADU law and update regulations as necessary to ensure ongoing conformance. The City will continue to encourage ADU production through targeted public information and identification of a designated planner to provide assistance to ADU applicants.

Timeframe:	Code amendments by October 2022
Responsible Agency:	Planning Department
Funding Source:	General Fund

Program Objective: 5 ADUs during the planning period

EQUAL ACCESS TO HOUSING

1211. Affirmatively Furthering Fair Housing

Section C.7 of the Community Profile summarizes the fair housing issues and concerns in Aliso Viejo based on findings of the 2020 Regional Analysis of Impediments to Fair Housing and additional research conducted as part of this Housing Element update. The following table summarizes the fair housing issues and contributing factors that have been identified as well as the City's proposed actions to address these issues. The City recently hired a Housing Programs Specialist, whose responsibilities include many of the actions outlined below. Relevant responsibilities of this new staff position are described in Appendix D.

AFH Identified Fair Housing Issues	Contributing Factors	City Actions
New Housing Options in High Opportunity Areas - Expand access to opportunity for protected classes	▪ Location and type of affordable housing ▪ Lack of access to opportunity due to high housing costs ▪ Lack of fair housing outreach and enforcement ▪ Availability of affordable housing ▪ Availability of affordable units in a range of sizes	▪ Identify sites in high opportunity areas for new housing development ▪ Explore policies and programs that increase the supply of affordable housing ▪ Through the Fair Housing Foundation, the City will conduct landlord education campaign to educate property owners about State law prohibiting discrimination based on household income ▪ Through the Fair Housing Foundation, the City will provide fair housing education and information to apartment managers and homeowner associations on why denial of reasonable modifications/accommodations is unlawful ▪ Through the Fair Housing Foundation, the City will conduct fair housing outreach to tenants, landlords, property owners, realtors, and property management companies

AFH Identified Fair Housing Issues	Contributing Factors	City Actions
Protecting Existing Residents from Displacement	▪ Displacement of residents due to economic pressures ▪ Availability of affordable housing ▪ Availability of affordable units in a range of sizes	▪ Attend quarterly OCHA Housing Advisory Committee to enhance the exchange of information regarding the availability, procedures, and policies related to the Housing Assistance Voucher program and regional housing issues ▪ Provide five-year and annual PHA plan certifications
Provide Access and Inclusion for Persons with Disabilities	▪ Lack of supportive services for persons with disabilities ▪ Lack of access to resources, such as schools, transportation, and other in-home or community resources, for persons with disabilities	Review and amend if necessary the City's Housing and Reasonable Accommodation regulations and procedures

~~The City contracts with the Fair Housing Foundation (FHF) to provide fair housing services. FHF services are directed to promote housing opportunities for all persons regardless of race, religion, sex, family size, marital status, ancestry, national origin, color, or disability.~~

~~Municipal Code Chapter 15.66 establishes procedures to ensure reasonable accommodation in housing for persons with disabilities. The City will continue to offer reasonable accommodation in conformance with fair housing law.~~

~~Aliso Viejo was also a participating jurisdiction in the preparation of the Orange County Analysis of Impediments to Fair Housing Choice (AI). Regional goals and strategies to address fair housing are described in the AI Executive Summary (pages 6-7). In addition to the region-wide goals and strategies, the following specific goals have been established for Aliso Viejo:~~

~~1. In collaboration with the Orange County Housing Authority (OCHA):~~

~~a. Attend quarterly OCHA Housing Advisory Committee to enhance the exchange of information regarding the availability, procedures, and policies related to the Housing Assistance Voucher program and regional housing issues.~~

~~b. Support OCHA's affirmative fair marketing plan and de-concentration policies by providing five-year and annual PHA plan certifications.~~

~~c. In coordination with OCHA and fair housing services provider, conduct landlord education campaign to educate property owners about State law prohibiting discrimination based on household income.~~

~~2. Through the City's fair housing contractor:~~

~~a. Provide fair housing education and information to apartment managers and homeowner associations on why denial of reasonable modifications/accommodations is unlawful.~~

~~b. Conduct multi-faceted fair housing outreach to tenants, landlords, property owners, realtors, and property management companies. Methods of outreach may include workshops, informational booths, presentations to community groups, and distribution of multi-lingual fair housing literature.~~

Timeframe: Throughout the planning period

Responsible Agency: Community Development~~Planning~~ Department; Fair Housing Foundation

Funding Source: County Housing Funds

Program Objectives: Continue to support fair housing services in Aliso Viejo by advertising fair housing services on the City website and at the public counter at City Hall, library, post office, and other community locations.

Continue to implement administrative procedures set forth in Municipal Code Chapter 15.66 to ensure reasonable accommodation in housing for persons with disabilities.

Continue to implement actions to affirmatively further fair housing as described in the 2020-2024 Orange County Analysis of Impediments to Fair Housing Choice.

ENERGY CONSERVATION

1312. Encourage Energy Conservation

The Zoning Code includes a Green Building Program that offers incentives such as expedited processing and/or fee waivers when project proponents agree to incorporate environmentally sensitive sustainable and energy efficient construction techniques into their projects. Expedited permit processing is provided for all building permits for solar voltaic, solar thermal systems, tankless water heaters, windows and/or doors containing glass, high-efficiency heating, ventilation, and air conditioning (HVAC) systems. Furthermore, the Solar Energy Education Program complements the Green Building Program by encouraging use of passive solar systems in new and rehabilitated residential construction to improve energy efficiency of housing units. Daytime interior lighting costs can be significantly reduced or eliminated with the use of properly designed and located skylights, which can be easily installed at reasonable expense in existing houses, thereby substantially reducing electricity costs and energy consumption. Solar energy is a practical, cost effective, and environmentally sound way to heat and cool a home. Other opportunities for energy conservation in Aliso Viejo include continued implementation of State Title 24 building construction standards, complying with Energy Star conservation standards, and considering appropriate building orientation and landscaping during the development/design review process through implementation of the Zoning Ordinance.

Timeframe:	Throughout the planning period
Responsible Agency:	Planning Department
Funding Source:	General Fund
Program Objective:	Encourage energy conservation

QUANTIFIED HOUSING OBJECTIVES

The City's objectives for new housing construction, rehabilitation, and conservation for the 2021-2029 planning period are summarized in Table H-1.

Table H-1
Quantified Objectives – 2021-2029

Program Category	Income Category					
	Extremely Low	Very Low	Low	Mod	Upper	Totals
New Construction	195	195	214	205	386	1,195
Rehabilitation	2	3	5	-	-	10
Conservation	528					528

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APPENDIX C: COMMUNITY PROFILE

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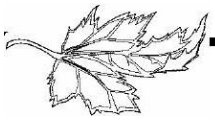
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C-1. INTRODUCTION

The City strives to achieve a balanced housing stock that meets the varied needs of all income segments of the community. To accomplish this goal, a comprehensive assessment of community housing needs, obstacles to future housing opportunity, and an assessment of available resources must be undertaken.

DEMOGRAPHIC AND HOUSING ANALYSIS

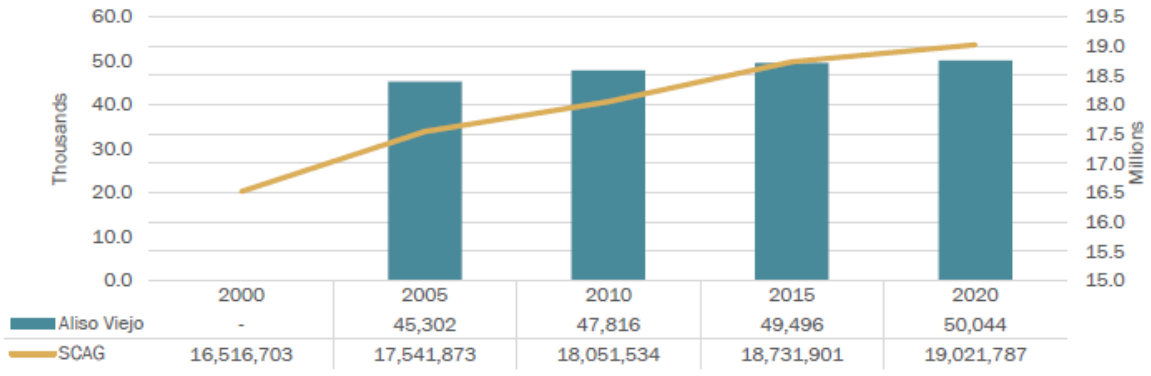
Factors such as age, cultural preferences, household size, occupation, and income combine to influence the types of housing needed and the ability to afford housing. These demographic characteristics, balanced with an analysis of existing housing stock conditions, help determine a community's housing needs.

The statistics included here are from recent data from the U.S. Census, the California Department of Finance (DOF), the California Employment Development Department (EDD), the Southern California Association of Governments (SCAG), and other relevant sources.

POPULATION CHARACTERISTICS

Aliso Viejo's population in 2020 was approximately 50,044. As the City has approached full development population growth has slowed, with an increase of only about 550 persons during the 5-year period from 2015 to 2020 (Table CP-1).

Table CP-1
Population Trends: Aliso Viejo and SCAG Region



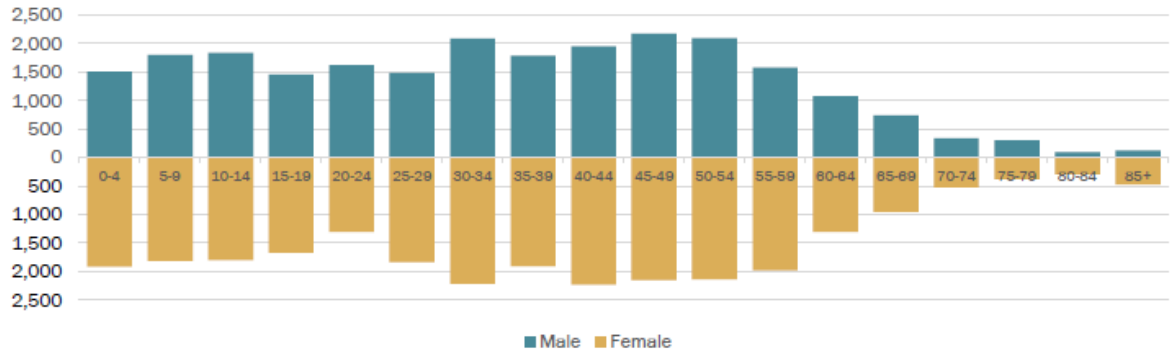
CA DOF E-5 Population and Housing Unit Estimates

AGE CHARACTERISTICS

A community's housing needs are affected by the age characteristics of residents. Typically, each age group has distinct lifestyles, family type and size, incomes, and housing preferences. As people move through each stage of life, housing needs and preferences change.

The share of Aliso Viejo's population under 18 years of age is 24.6%, which is slightly higher than the regional share of 23.4%. Aliso Viejo's seniors (65 and above) make up about 8.3% of the population, which is substantially lower than the regional share of 13% (Table CP-2).

Table CP-2
Age Characteristics



American Community Survey 2014-2018 5-year estimates

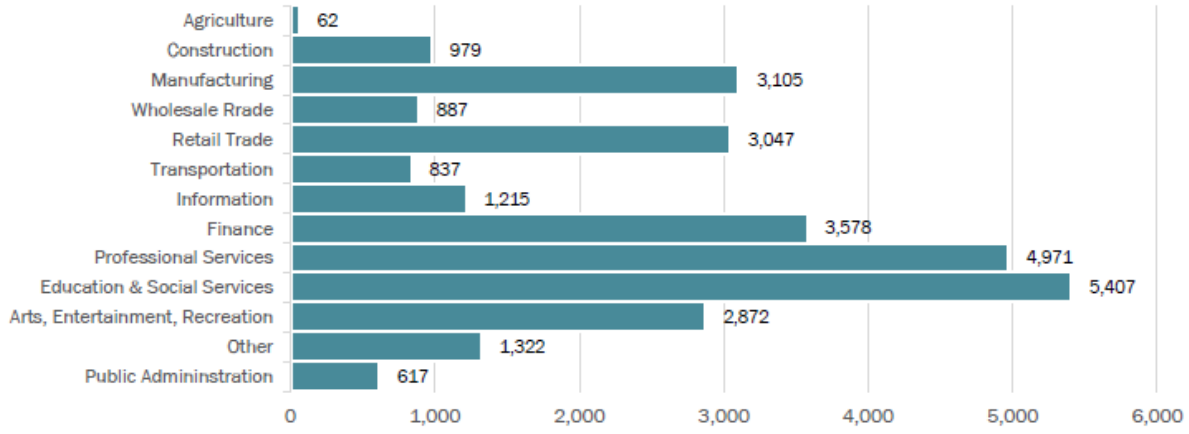
OCCUPATION AND LABOR PARTICIPATION

Employment has an important impact on housing needs. Different jobs and income levels affect the type and size of housing a household can afford. In addition, employment growth within a region typically results in an increase in housing demand.

According to recent Census data, Aliso Viejo has 28,899 workers living within its borders who work across 13 major industrial sectors (Table CP-3). The most prevalent industry is Education & Social Services with 5,407 employees (18.7% of total) and the second most prevalent industry is Professional Services with 4,971 employees (17.2% of total).

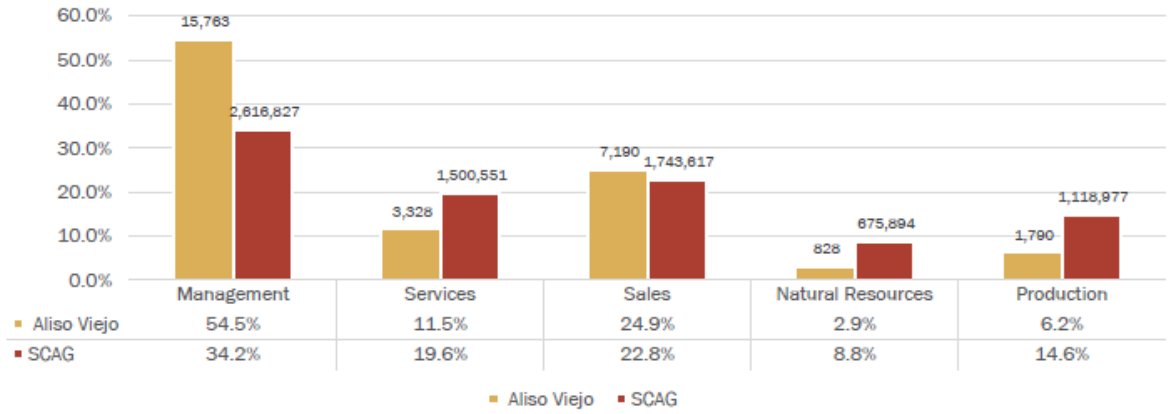
The most prevalent occupational category in Aliso Viejo is Management, in which 15,763 (54.5% of total) employees work. The second-most prevalent type of work is in Sales, which employs 7,190 (24.9% of total) in Aliso Viejo (Table CP-4).

Table CP-3
Employment by Industry



American Community Survey 2014-2018 5-year estimates using groupings of 2-digit NAICS codes.

Table CP-4
Employment by Occupation – Aliso Viejo and SCAG Region



American Community Survey 2014-2018 5-year estimates using groupings of SOC codes.

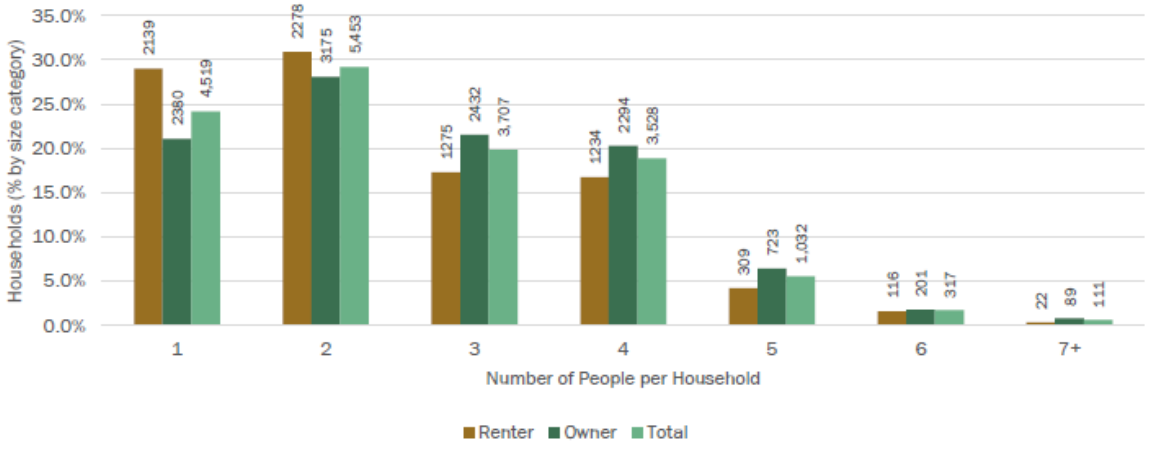
HOUSEHOLD CHARACTERISTICS

A household is defined by the Census as all persons who occupy a housing unit, which may consist of a family, a single person, or unrelated persons sharing a housing unit. Persons residing in group quarters such as dormitories or retirement homes are not considered households. A community's household characteristics serve as an important indicator of the type and size of housing needed.

Household size is an important indicator of housing need. The presence of families with children, students, and elderly persons, among other groups, can have different effects on the household size in a community.

Recent Census data reported that the most commonly occurring household size is two persons (29.2%) while the second-most commonly occurring household size is one person (24.2%). Aliso Viejo has a slightly higher share of single-person households than the SCAG region overall (24.2% vs. 23.4%) and a much lower share of large households with 7+ persons than the SCAG region overall (0.6% vs. 3.1%). This suggests that the need for smaller units is significantly greater than for large units, especially among renters (Table CP-5).

Table CP-5
Household Size by Tenure

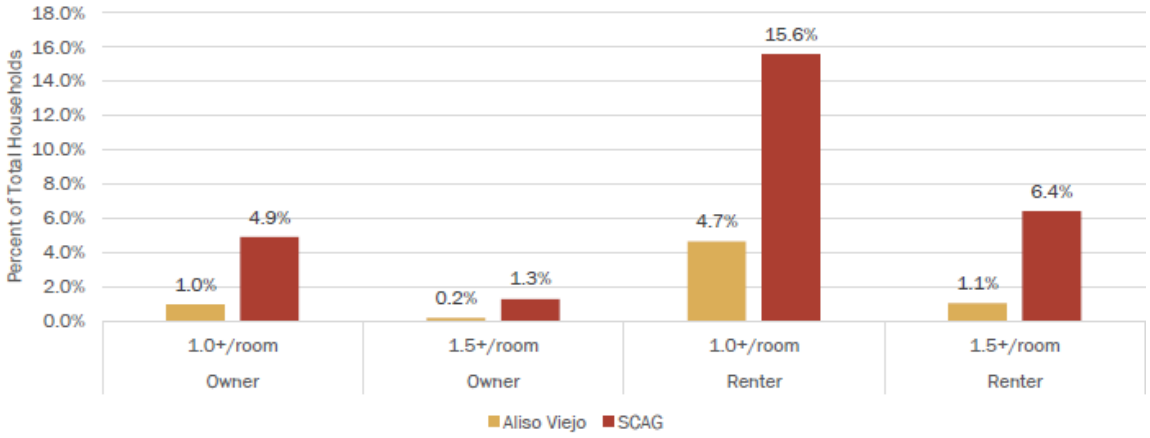


American Community Survey 2014-2018 5-year estimates.

OVERCROWDING

The Census defines overcrowding as households with more than one person per room, excluding kitchens, bathrooms, and porches. Overcrowding can result when a shortage of larger units exists within a community or in cases where high housing costs force families to take on additional roommates or choose smaller units. Overcrowding also tends to accelerate deterioration of housing. Therefore, maintaining a reasonable level of occupancy and alleviating overcrowding are important objectives.

Table CP-6
Overcrowding by Tenure: Aliso Viejo and SCAG Region



American Community Survey 2014-2018 5-year estimates.

According to recent Census data, overcrowding in Aliso Viejo is much less prevalent than for the County as a whole. Only about 1 percent of owner households and 6 percent of renter households in Aliso Viejo were reported to be overcrowded compared to 6 percent of owners and 22 percent of renters throughout the SCAG region (Table CP-6). Housing Program 1, *Adequate Sites for New Housing*, will help to alleviate problems associated with overcrowding by expanding housing opportunities in the City. Housing Program 2, *Facilitate the Provision of Affordable Housing*, and Housing Program 3, *Homeownership Assistance Programs*, can reduce the problem of overcrowding for large-renter households by making it more feasible for these households to rent or purchase suitable homes. In addition, Housing Program 4, *Section 8 Housing Choice Vouchers*, and Program 5, *OCHA Special Needs Groups Rental Assistance Program (Family Unification)*, can assist renter-households experiencing overcrowding by making rental assistance available to facilitate moving into larger units.

HOUSEHOLD INCOME AND OVERPAYMENT

Income is one of the most important factors affecting housing opportunities available to a household, determining the ability to balance housing costs with other basic necessities. While housing choices, such as tenure (owning versus renting) and location are mostly income-dependent, household size and type also affect the proportion of income that can be spent on housing.

"Overpayment" is defined as paying more than 30 percent of gross income for housing expenses, including utilities. Overpayment is much more prevalent among lower-income households, as shown in Table CP-7.

Table CP-7
Overpayment by Income Category and Tenure

Income by Cost Burden	Cost Burden > 30%	Cost Burden > 50%	Total
Renters			
Household income ≤ 30% HAMFI	660	635	790
Household income > 30% to ≤ 50% HAMFI	710	640	810
Household income > 50% to ≤ 80% HAMFI	1,185	425	1,240
Household income > 80% to ≤ 100% HAMFI	725	10	1,095
Household income ≥ 100% HAMFI	325	–	3,435
Total	3,605	1,710	7,375
Owners			
Household income ≤ 30% HAMFI	580	520	695
Household income > 30% to ≤ 50% HAMFI	205	145	340
Household income > 50% to ≤ 80% HAMFI	545	325	930
Household income > 80% to ≤ 100% HAMFI	640	105	1,155
Household income ≥ 100% HAMFI	1,240	80	8,175
Total	3,210	1,175	11,295

Notes:
HAMFI = HUD Area Median Family Income
≤ = less than or equal to
≥ = greater than or equal to

	Households by Share of Income Spent on Housing Cost:		
Income	< 30%	30-50%	> 50%
< 30% HAMFI	105	124	1,025
30-50% HAMFI	240	185	695
50-80% HAMFI	640	1,535	670
80-100% HAMFI	730	935	135
> 100% HAMFI	9,830	1,460	134
Total Households	*11,545*	*4,239*	*2,659*

HUD CHAS, 2012-2016. HAMFI refers to Housing Urban Development Area Median Family Income.

Extremely-Low-Income Households

Housing the extremely-low-income population (below 30% of area median income) can be especially challenging. Table CP-8 provides a breakdown of extremely-low-income households by race, ethnicity and tenure. The race/ethnicity with the highest share of extremely-low-income households in Aliso Viejo is Black, non-Hispanic (22.4% compared to 7.7% of total population). About 12 percent of renter households had extremely-low incomes as compared to approximately 5 percent of owners. As shown in Table CP-7 above, overpayment is most prevalent among extremely-low-income households, both owners and renters. The Housing Plan addresses the needs of ELI households through Program 2, *Facilitate the Provision of Affordable Housing*, and Housing Program 3, *Homeownership Assistance Programs*, by making it more feasible for ELI households to rent or purchase suitable homes.

Table CP-8
Extremely-Low-Income Households by Race/Ethnicity and Tenure

	Total Households	Households below 30% HAMFI	Share below 30% HAMFI
White, non-Hispanic	12,570	960	7.6%
Black, non-Hispanic	380	85	22.4%
Asian and other, non-Hispanic	3,545	295	8.3%
Hispanic	2,120	100	4.7%
TOTAL	**18,615**	**1,440**	**7.7%**
Renter-occupied	7,450	875	11.7%
Owner-occupied	11,150	550	4.9%
TOTAL	**18,600**	**1,425**	**7.7%**

HUD CHAS, 2012-2016. HAMFI refers to Housing Urban Development Area Median Family Income.

SPECIAL NEEDS POPULATIONS

Certain groups have greater difficulty finding decent, affordable housing due to special needs and/or circumstances. Special circumstances may be related to one's employment and income, family characteristics, disability, and household size, among others. Consequently, certain segments of residents in Aliso Viejo may experience a higher prevalence of housing cost burden, overcrowding, or other housing problems.

Under state law, "special needs" groups include senior households, persons with disabilities, large households, single-parent households, homeless persons, and agricultural

workers. This section provides a discussion of the housing needs facing each of these groups, as well as programs and services available to address housing or related needs.

Senior Households

Many senior households have special needs due to relatively low, fixed incomes, physical disabilities or limitations, or dependency needs. Specifically, people aged 65 years and older often have four main concerns:

- *Housing*: Many seniors live alone and/or are renters.
- *Income*: People aged 65 and over are usually retired and living on a fixed income.
- *Health care*: Seniors are more likely to have health issues or disabilities.
- *Transportation*: Some of the elderly rely on public transportation. A significant number of seniors with disabilities may require alternative transportation.

According to recent HUD data, about 20.5% of elderly households have incomes less than 30% of the surrounding area income (compared to 24.2% in the SCAG region) and 30.4% have incomes below 50% of median income (compared to 30.9% in the SCAG region) (Table CP-9).

Table CP-9
Elderly Households by Income and Tenure

		Owner	Renter	Total	Percent of Total Elderly Households:
Income category, relative to surrounding area:	< 30% HAMFI	205	445	650	20.5%
	30-50% HAMFI	80	235	315	9.9%
	50-80% HAMFI	385	155	540	17.0%
	80-100% HAMFI	185	170	355	11.2%
	> 100% HAMFI	985	330	1,315	41.4%
	TOTAL	1,840	1,335	3,175	

HUD CHAS, 2012-2016. HAMFI refers to Housing Urban Development Area Median Family Income.

There are four senior-living complexes in Aliso Viejo: The Covington located at 3 Pursuit, Renaissance at the Wellington located at 24903 Moulton Parkway, Vintage Aliso (2C Liberty), and Liberty at Aliso (100 Freedom). The Covington includes 180 units; 155 of which are for independent living. The Wellington provides 233 units for senior residents; approximately half of the units are designated for independent living and the other half are for assisted living. The rental costs for both the independent and assisted living units at the two facilities are above-moderate. Vintage Aliso provides 202 senior apartments while

Liberty at Aliso includes 200 senior apartments (two units at each complex are for managers).

Various programs can address the special needs of seniors, including but not limited to congregate care, supportive services, rental subsidies, shared housing, and housing rehabilitation assistance. For the frail elderly, or those with disabilities, housing with architectural design features that accommodate disabilities can help ensure continued independent living. Seniors with mobility or self-care limitations also benefit from transportation alternatives. Senior housing with supportive services can be provided for those who require assistance with daily living.

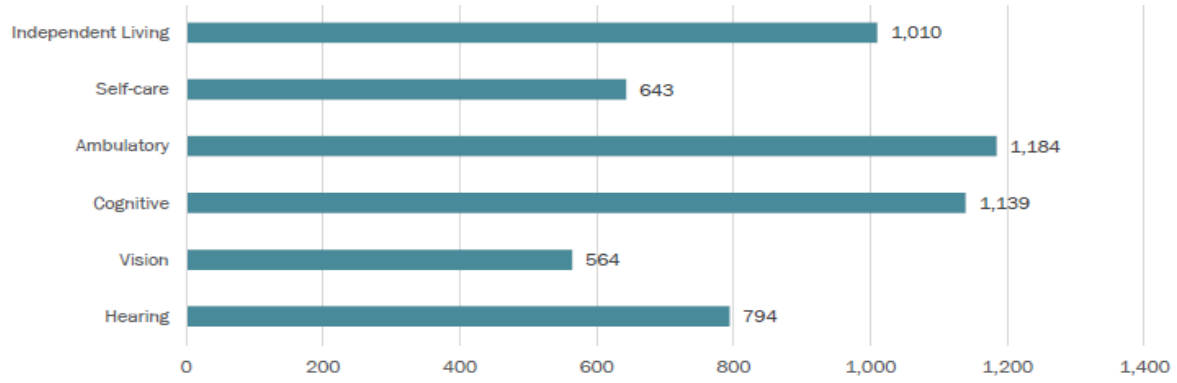
Numerous programs and services assist Aliso Viejo seniors. Age Well Services is located in neighboring Laguna Woods, and Advocates for Senior Choices is located in nearby Mission Viejo. Age Well Services assists seniors with referrals for in-home help, personal care or housekeeping, Medicare, medical information, assisted living care, physicians, attorneys, and also a range of adult day services that include social and educational activities, exercise, and special outing and events. For seniors that have mobility restrictions, the Age Well Services Transportation program provides door-to-door driver-assisted services Monday through Friday. Case managers also facilitate the Meals-on-Wheels program that operates in south Orange County. The Meals-on-Wheels program provides meals to individuals 60 years of age and older, who are living at home and unable to prepare their own meals or go out to eat, and have little or no assistance to obtain adequate meals. Age Well Services is licensed by the State of California Department of Health Services.

The programs available in Aliso Viejo to assist seniors with special housing needs include Housing Program 6, *City Grants for Special Needs Groups,* Housing Program 4, *Section 8 Housing Vouchers*, and Program 5, *OCHA Special Needs Groups Rental Assistance Program (Hope IV – Elderly Independence)*, which provide rental assistance to seniors. Housing Program 11, *Affirmatively Furthering Fair Housing*, assures the City's commitment to support fair housing services for all residents.

Persons with Disabilities

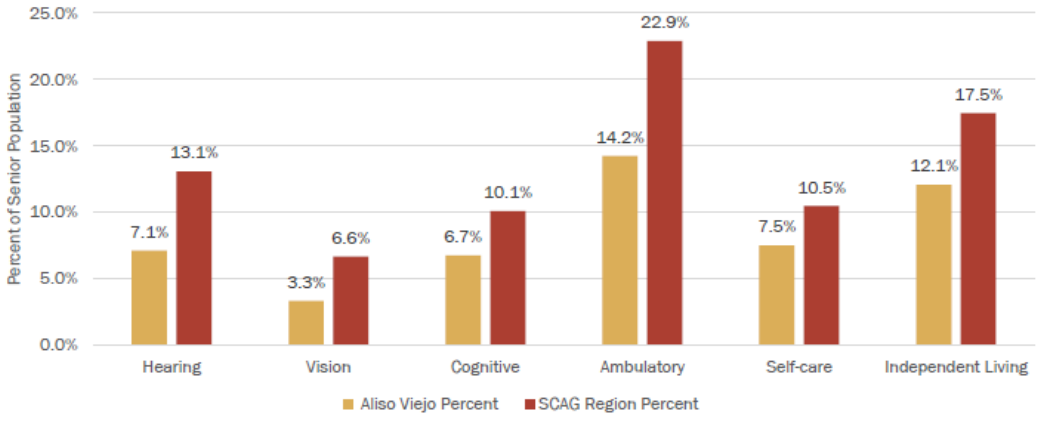
Physical, mental, and/or development disabilities may prevent a person from working, restrict mobility, or make it difficult to care for oneself. Disabilities often result in special housing needs related to limited earning capacity, the lack of accessible and affordable housing, and higher health costs. Some residents suffer from disabilities that require living in a supportive or institutional setting. Recent disability statistics for Aliso Viejo residents as reported by the Census Bureau are presented in Table CP-10 while disability data for seniors are shown in Table CP-11.

Table CP-10
Disabilities by Type – Aliso Viejo



American Community Survey 2014-2018 5-year estimates.

Table CP-11
Disabilities by Type for Seniors - Aliso Viejo and SCAG Region



American Community Survey 2014-2018 5-year estimates.

Ambulatory and cognitive disabilities are the most prevalent types of disabilities for the general population in Aliso Viejo. Among seniors, the most prevalent disability types are ambulatory (14 percent) and independent living (12 percent).

Living arrangements for persons with disabilities depend on the severity of the disability. Many live at home independently or with other family members. Strategies that can assist those with disabilities include special housing design features, income support for those who are unable to work, and in-home supportive services for persons with medical conditions. Such services may be provided by either public or private agencies.

The City enforces the accessibility requirements contained in the California Building Code,

Other regulations that affect housing for persons with special needs are discussed in the Governmental Constraints section of this report.

Developmental Disabilities

As defined by federal law, "developmental disability" means a severe, chronic disability of an individual that:

- Is attributable to a mental or physical impairment or combination of mental and physical impairments;
- Is manifested before the individual attains age 22;
- Is likely to continue indefinitely;
- Results in substantial functional limitations in three or more of the following areas of major life activity: a) self-care; b) receptive and expressive language; c) learning; d) mobility; e) self-direction; f) capacity for independent living; or g) economic self-sufficiency;
- Reflects the individual's need for a combination and sequence of special, interdisciplinary, or generic services, individualized supports, or other forms of assistance that are of lifelong or extended duration and are individually planned and coordinated.

The Census Bureau does not report developmental disabilities. According to the U.S. Administration on Developmental Disabilities, an accepted estimate of the percentage of the population that can be defined as developmentally disabled is 1.5 percent. Many persons with developmental disabilities can live and work independently within a conventional housing environment. Those with more severely disabilities may require a group living environment where support is provided. The most severely affected individuals may require an institutional environment where medical attention and physical therapy are provided. Because developmental disabilities exist before adulthood, an important issue in supportive housing for those with developmental disabilities is the transition from the person's living situation as a child to an appropriate level of independence as an adult.

The California Department of Developmental Services (DDS) reported that approximately 726 persons in Aliso Viejo experienced some type of developmental disability (Table CP-12).

Table CP-12
Developmental Disabilities – Aliso Viejo

		Aliso Viejo
By Residence:	Home of Parent/Family/Guardian	260
	Independent/Supported Living	14
	Community Care Facility	0
	Intermediate Care Facility	0
	Foster/Family Home	5
	Other	0
By Age:	0 - 17 Years	279
	18+ Years	168
TOTAL		726

CA DDS consumer count by CA ZIP, age group and residence type for the end of June 2019. Data available in 161/197 SCAG jurisdictions.

The State Department of Developmental Services (DDS) provides community-based services to persons with developmental disabilities and their families through a statewide system of 21 regional centers, four developmental centers, and two community-based facilities. The Regional Center of Orange County[1] (RCOC) is one of 21 regional centers in California that provides point of entry to services for people with developmental disabilities. The RCOC is a private, non-profit community agency that contracts with local businesses to offer a wide range of services to individuals with developmental disabilities and their families.

Any resident of Orange County who has a developmental disability that originated before age 18 is eligible for services. Services are offered to people with developmental disabilities based on Individual Program Plans and may include: Adult day programs; advocacy; assessment/consultation; behavior management programs; diagnosis and evaluation; independent living services; infant development programs; information and referrals; mobility training; prenatal diagnosis; residential care; respite care; physical and occupational therapy; transportation; consumer, family vendor training; and vocational training. RCOC also coordinates the State-mandated Early Start program, which provides services for children under age three who have or are at substantial risk of having a developmental disability.

The mission of the Dayle McIntosh Center is to advance the empowerment, equality, integration, and full participation of people with disabilities in the community. The Center is not a residential program, but instead promotes the full integration of disabled persons into the community. Dayle McIntosh Center is a consumer-driven organization serving all disabilities. Its staff and board are composed of over 50 percent of people with disabilities.

1 https://www.rcocdd.com/

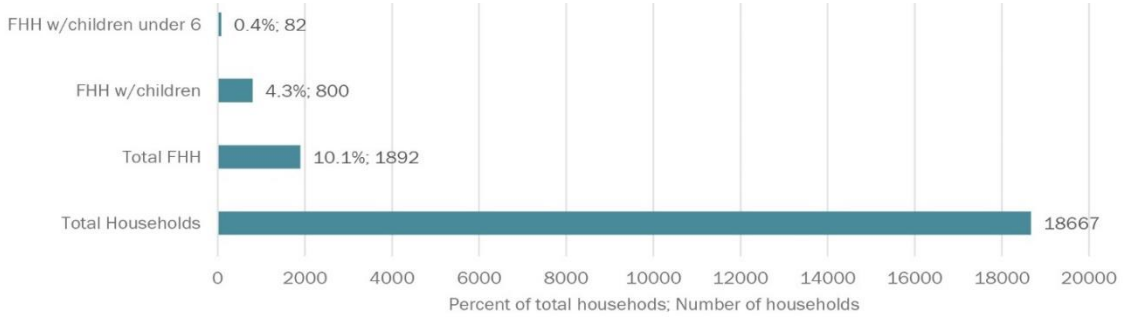
Its two offices service over 500,000 people in Orange County and surrounding areas with disabilities. The Center's South County branch is located in Laguna Hills, immediately adjacent to Aliso Viejo.

Housing Program 4, *Section 8 Housing Choice Vouchers*, and Program 5, *OCHA Special Needs Groups Rental Assistance Program (Aftercare for Disabled and Shelter Care Plus),* can provide rental assistance to the disabled. In addition, Housing Program 11, *Affirmatively Furthering Fair Housing*, ensures that services are available to promote equal housing opportunities for all persons, including those with disabilities.

Female-Headed Households

Because of their relatively lower incomes and higher living expenses, female-headed households are more likely to have difficulty finding affordable, decent, and safe housing. These households often require special consideration and assistance as a result of their greater need for affordable housing, accessible day care/childcare, health care, and other supportive services. Female-headed families with children are a particularly vulnerable group because they must balance the needs of their children with work responsibilities, and often while earning limited incomes. According to recent Census data, about 10.1% are female-headed (compared to 14.3% in the SCAG region), 4.3% are female-headed and with children (compared to 6.6% in the SCAG region), and 0.4% are female-headed and with children under 6 (compared to 1.0% in the SCAG region) (Table CP-13).

Table CP-13
Female-Headed Households



American Community Survey 2014-2018 5-year estimates.

The City collaborates with the Boys & Girls Club of Capistrano Valley to provide traditional afterschool programs in the areas of education, career development, the arts, technology, health and life skills, sports, fitness and recreation, and character and leadership development. Programs include homework club, teen club, and an online learning pods. For adults there are a number of outreach programs, which includes the following collaborative partners: Champions for Change, Consumer Credit Counseling Services of Orange County, Saddleback's College Foster & Kinship Care Education, Miracles for Families, OCSD, Second Harvest Food Bank, South Orange County Childhood Obesity Task Force, Southern California Veterinary Medical Association, Soka University, Legal Aid Society of Orange County, and Orange County United Way Internal Revenue Service.

These programs and services offered through the City and the Boys & Girls Club can benefit female-headed households with children.

This Housing Element outlines a variety of City programs that can assist female-headed households with children who might have special housing needs. Housing Program 2, *Facilitate the Provision of Affordable Housing*, and Housing Program 3, *Homeownership Assistance Programs*, can benefit female-headed households by making it more feasible for these households to rent or purchase suitable homes. Housing Program 11, *Affirmatively Furthering Fair Housing*, helps ensure equal housing opportunities for all persons regardless of sex, family size, or marital status.

Large Households

Large households are defined as those consisting of five or more members. As shown in Table CP-5 above, recent Census data estimated that about 1,460 large households resided in Aliso Viejo, of which 447 (31 percent) were renters and 1,013 (69 percent) were owners.

A variety of City programs can assist large households. Housing Program 1, *Adequate Sites for Affordable Housing*, can alleviate housing problems experienced by many large households by ensuring a wide variety of housing opportunity is available in the City. Housing Program 2, *Facilitate the Provision of Affordable Housing*, Housing Program 3, *Homeownership Assistance Programs*, can reduce the problem of overcrowding and overpayment for large-renter households by adopting programs that make it more feasible for these households to rent and purchase larger homes. Housing Program 4, *Section 8 Housing Choice Vouchers*, and Program 5, *OCHA Special Needs Groups Rental Assistance Program (Family Unification)*, offer rental assistance to large renter-households. Housing Program 11, *Affirmatively Furthering Fair Housing*, helps promote equal housing opportunities for all persons regardless of family size.

Agricultural Workers

Recent Census estimates reported no residents of Aliso Viejo were employed in farming, fishing and forestry occupations[2]. While there are no farmworkers in the city, the Census of Agriculture estimated that there were approximately 1,772 farmworkers in Orange County as of 2017, of which 666 (38%) were seasonal (i.e., working 150 days or less per year). Any agricultural workers who choose to live in Aliso Viejo are eligible for any affordable housing programs and are not restricted by occupation.

Homeless Persons

The Orange County homeless population consists of working families and individuals. Many live in cars, parks, under bridges, motels and in homeless shelters trying to maintain their dignity while they struggle to survive. As a result, most homeless remain hidden. The

2 American Community Survey 2014-2018

most recent County of Orange "Point-in-Time" survey of the homeless population for which data is available was conducted in January 2019. That survey estimated that there were approximately 6,860 homeless persons in Orange County, of which 2,899 were sheltered and 3,961 were unsheltered[3]. Of those, one unsheltered person and no sheltered persons were reported in Aliso Viejo.

Regional strategies to combat homelessness are developed through Orange County's Continuum of Care System. The goal of the Continuum of Care Strategic Plan is to work toward a seamless system of care through advocacy, homeless prevention, outreach and assessment, emergency shelter, transitional shelter and permanent affordable housing. The City of Aliso Viejo continues to participate in the Orange County Continuum of Care system and contributes to the regional effort by providing letters of support and participating in a survey of funding allocated for homeless services in the County. Table CP-14 identifies emergency shelters that located near Aliso Viejo.

Table CP-14
Nearby Homeless Shelters

Homeless Shelter	Location
Cold Weather/Laguna Beach	Laguna Beach
CSP Youth Shelter	Laguna Beach
Friendship Shelter	Laguna Beach
Interfaith Interim Housing	Laguna Hills
Saddleback Community Outreach	Laguna Hills

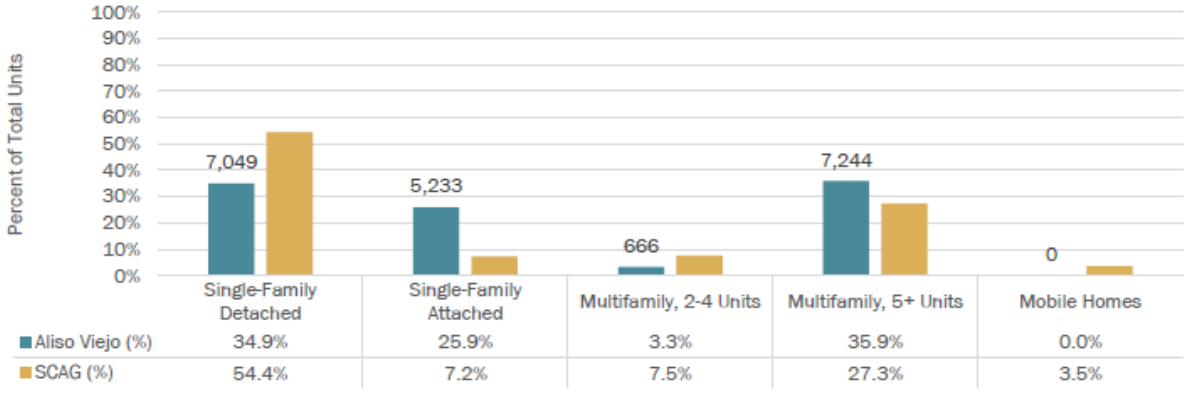
In addition, Aliso Viejo has developed housing programs outlined in this Housing Element to assist those who may experience homelessness. Provisions for accommodating emergency shelters are included in the Zoning Ordinance. Permanent emergency shelters are permitted by-right in the Business Park zoning districts, and transitional/supportive housing is a permitted use in all residential zoning districts. Housing Program 5, *OCHA Special Needs Groups Rental Assistance Program (Shelter Care Plus)*, provides rental assistance to those with disabilities and experiencing homelessness.

3 County of Orange, 2019 Point in Time Final Report, July 30, 2019 (http://ochmis.org/wp-content/uploads/2019/08/2019-PIT-FINAL-REPORT-7.30.2019.pdf)

HOUSING STOCK

Aliso Viejo offers a wide variety of housing types to meet the needs of its current and future residents. According to the California Department of Finance, about 35 percent of Aliso Viejo's housing stock consisted of single-family detached homes, 26 percent were single-family attached homes (townhouses), and 39 percent were multi-family apartments (Table CP-15).

Table CP-15
Housing Stock – Aliso Viejo and SCAG Region



CA DOF E-5 Population and Housing Unit Estimates

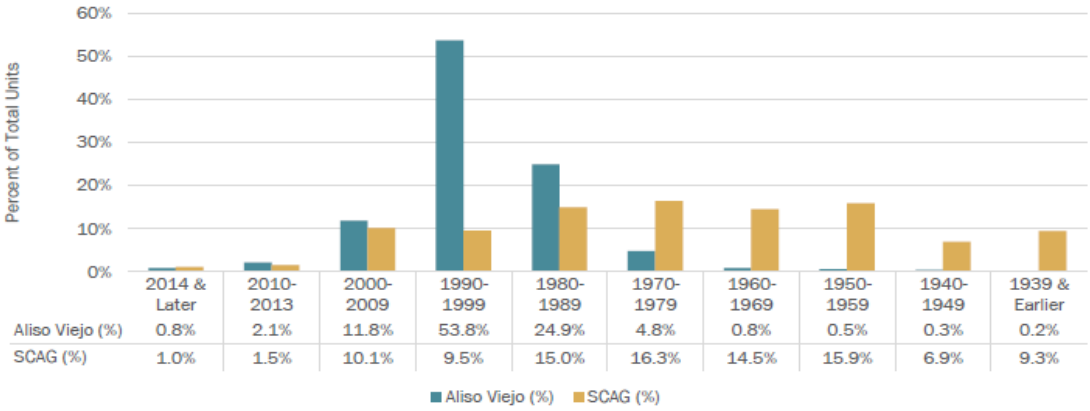
HOUSING AGE AND CONDITION

Housing age may be an important indicator of housing condition within a community. Housing is subject to gradual physical or technological deterioration over time. If not properly and regularly maintained, housing can deteriorate and discourage reinvestment, depress neighboring property values, and eventually impact the quality of life in a neighborhood.

Housing units in Aliso Viejo are relatively new when compared to the age of the region's housing stock (Table CP-16). Over two-thirds of Aliso Viejo's housing stock was constructed after 1990. A general rule in the housing industry is that structures older than 30 years begin to show signs of deterioration and require ongoing maintenance and repairs. Therefore, based on age alone, less than 28 percent of the housing stock may require maintenance and rehabilitation to prevent significant deterioration. Based on observations of City code enforcement staff and building inspectors, it is estimated that there are approximately 50 housing units in need of minor repair and 5 units in need of major rehabilitation or replacement, Although the vast majority of housing units in Aliso Viejo are less than 30 years of age, and problems associated with age and deterioration are likely

to be minimal, Housing Program 7, *Code Enforcement*, is designed to identify potential maintenance problems that could arise as the housing stock ages.

Table CP-16
Housing Units by Year Built – Aliso Viejo and SCAG Region



	2014 & Later	2010-2013	2000-2009	1990-1999	1980-1989	1970-1979	1960-1969	1950-1959	1940-1949	1939 & Earlier
Aliso Viejo (%)	0.8%	2.1%	11.8%	53.8%	24.9%	4.8%	0.8%	0.5%	0.3%	0.2%
SCAG (%)	1.0%	1.5%	10.1%	9.5%	15.0%	16.3%	14.5%	15.9%	6.9%	9.3%

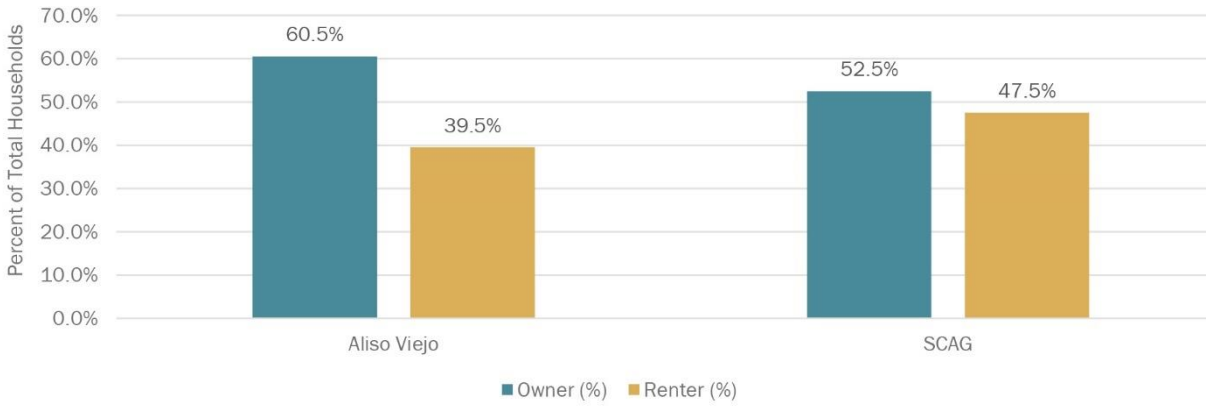
American Community Survey 2014-2018 5-year estimates.

HOUSING TENURE AND VACANCY

Housing tenure and vacancy rates are important indicators of the supply and cost of housing. Housing tenure refers to whether a unit is owned or rented. Vacancies are an important housing market indicator in that the vacancy rate often influences the cost of housing and reflects the match between housing demand and availability.

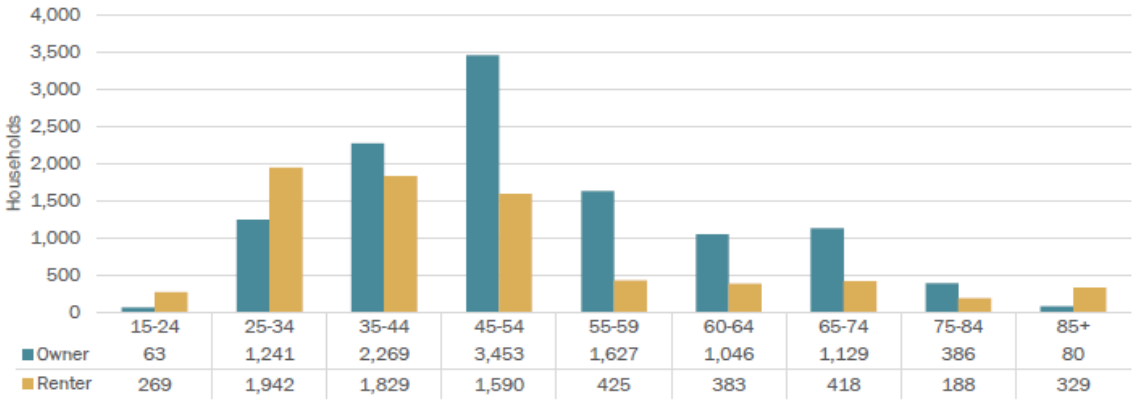
Recent Census estimates reported that about 61 percent of Aliso Viejo residents owned the units they occupied as compared to about 53 percent for the SCAG region as a whole (Table CP-17). Tenure varied by age, with the majority of Aliso Viejo residents between the ages of 35 and 84 owning their home (Table CP-18).

Table CP-17
Housing Tenure: Aliso Viejo and SCAG Region



American Community Survey 2014-2018 5-year estimates.

Table CP-18
Housing Tenure by Age Group

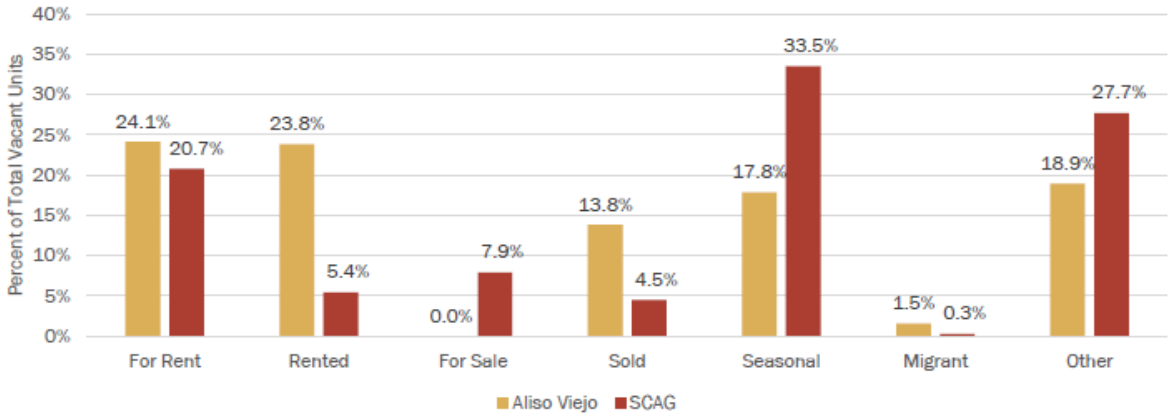


	15-24	25-34	35-44	45-54	55-59	60-64	65-74	75-84	85+
Owner	63	1,241	2,269	3,453	1,627	1,046	1,129	386	80
Renter	269	1,942	1,829	1,590	425	383	418	188	329

American Community Survey 2014-2018 5-year estimates.

A certain number of vacant units are needed to allow sufficient choice and mobilty for residents. Generally, a vacancy rate of 1.5 to 2 percent for ownership housing and 5 percent for rental housing is considered necessary to balance demand and supply for housing. Recent Census vacancy estimates are shown in Table CP-19. Out of the total housing units in Aliso Viejo, there are approximately 19,078 occupied units, which equates to a 5.5% total vacancy rate.

Table CP-19
Vacant Units by Type



American Community Survey 2014-2018 5-year estimates.

HOUSING COSTS AND AFFORDABILITY

Housing Affordability Criteria

State law establishes five income categories for purposes of housing programs based on the area (i.e., county) median income (AMI): extremely-low (30% or less of AMI), very-low (31%-50% of AMI), low (51%-80% of AMI), moderate (81%-120% of AMI) and above moderate (over 120% of AMI). Housing affordability is based on the relationship between household income and housing expenses. According to HUD and the California Department of Housing and Community Development, housing is considered "affordable" if the monthly payment is no more than 30 percent of a household's gross income. In some areas, such as Orange County, these income limits may be increased to adjust for high housing costs.

Table CP-20 shows affordable rent levels and estimated affordable purchase prices for housing in Orange County (including Aliso Viejo)[4] by income category. Based on state-adopted standards, the maximum affordable monthly rent (including utilities) for 4-person extremely-low-income households is $1,009, while the maximum affordable rent for very-low-income households is $1,681. The maximum affordable rent for low-income households is $2,689, while the maximum for moderate-income households is $3,201.

Maximum purchase prices are more difficult to determine due to factors such as variations in mortgage interest rates, qualifying procedures, down payments, special tax assessments, homeowner association fees, and property insurance rates. With this caveat, the maximum

4 Affordable rent and purchase prices are based on county median income.

home purchase prices by income category shown in Table CP-20 have been estimated based on typical conditions.

Table CP-20
Affordable Housing Costs – Orange County

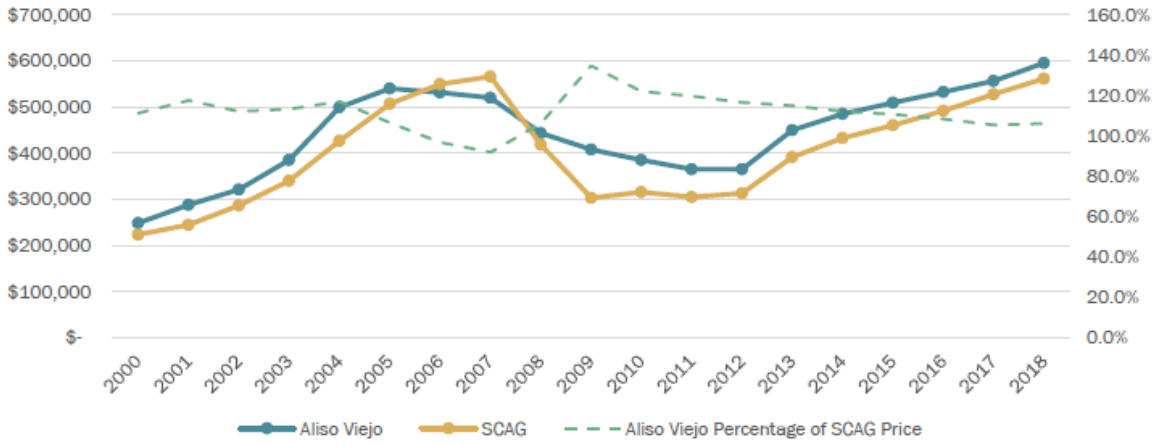
Income Category	Maximum Income	Affordable Rent	Affordable Price (est.)
Extremely Low	$40,350	$1,009	*
Very Low	$67,250	$1,681	*
Low	$107,550	$2,689	*
Moderate	$128,050	$3,201	$500,000
Above moderate	Over $128,050	Over $3,201	Over $500,000

Assumptions: Based on a family of 4 and 2021 State income limits; 30% of gross income for rent or principal, interest, taxes & insurance; 5% down payment, 4% interest, 1.25% taxes & insurance, $350 HOA dues
Notes:
*For-sale affordable housing is typically at the moderate income level
Source: Cal. HCD; JHD Planning LLC

For-Sale Housing

Sales price statistics for existing homes during 2000-2018 are shown in Table CP-21. Based on the estimated affordable purchase prices shown in Table CP-20 above, the majority of homes in Aliso Viejo are only affordable for above-moderate income households. These data illustrate that public subsidies are generally required to reduce sales prices to a level that is affordable to lower-income buyers.

Table CP-21
Median Sales Price for Existing Homes: Aliso Viejo and SCAG Region

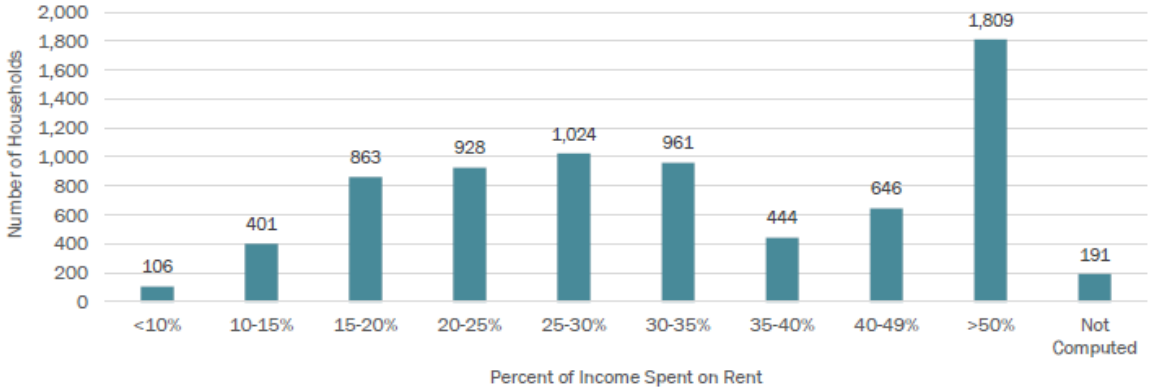


SCAG Local Profiles, Core Logic/Data Quick. SCAG median home sales price calculated as household-weighted average of county medians.

Rental Housing

As described previously in the discussion of income and overpayment, a substantial proportion of renters in Aliso Viejo fall within the lower-income categories. As a result, trends in rental rates have a major impact on these residents. Among Aliso Viejo's renter households, about 52 percent spend 30 percent or more of gross income on housing cost, compared to 55 percent in the entire SCAG region. Additionally, about 25 percent spend 50 percent or more of gross income on housing cost, compared to 29 percent in the SCAG region (Table CP-22). According to a recent internet survey[5] monthly rental rates in Aliso Viejo range from $2,200 for 1-bedroom apartments to $5,000 for single-family homes.

Table CP-22
Spending on Rent



AT RISK RENTAL HOUSING

Existing housing that receives governmental assistance is often an important source of affordable housing in many communities. This section identifies the publicly assisted rental housing in Aliso Viejo, and evaluates the potential to convert to market rates during the ten-year period 2021 to 2031.

Assisted Housing Inventory

Aliso Viejo has four assisted multi-family housing developments that provide 548 affordable housing units (Table CP-23). No lower-income rent-restricted units are at risk of converting to market-rate rents during the period of 2021 to 2031. As affordable housing opportunities are expanded in the future, the City will monitor the status, notify residents of potential conversion, and pursue options to preserve the units (Housing Program 8, *Conservation of Existing and Future Affordable Units*).

5 www.rent.com, October 2021

Table CP-23
Inventory of Assisted Rental Housing

Project Name	Assisted Units	Funding Source(s)	Earliest Date of Conversion	At Risk?
Vantis	20		2044	No
Woodpark Apartments	128	LIHTC	2050	No
Vintage Aliso	202	LIHTC	2072	No
Liberty at Aliso	198	LIHTC	2074	No
Total	**528**			

LOW- AND MODERATE-INCOME HOUSING IN THE COASTAL ZONE

The western edge of the city is within the Coastal Zone. Government Code Section 65590 et seq. prohibits conversion or demolition of existing residential dwelling units occupied by low- or moderate-income persons or families unless provision has been made for the replacement in the same city or county of those dwelling units with units for persons and families of low- or moderate-income (excludes structures with less than 3 units, or less than 10 units for projects with more than one structure, among other exclusions).

Section 65590(d) further requires new housing development in the Coastal Zone to provide housing units for persons and families of low or moderate income, or if not feasible, to provide such units at another location within the same city or county, within the Coastal Zone or within three miles thereof.

Prior to the incorporation of Aliso Viejo in 2001, 478 housing units were permitted by the County within the portion of the Coastal Zone that is now part of the City. The County allowed for the construction of the units at market rate and there are currently no affordable units located in that area of the City. There have been no residential units demolished or converted within the Coastal Zone since City incorporation in 2001.

~~AFFIRMATIVELY FURTHERING 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 not only prohibited discrimination in housing-related activities and transactions but also requires entities to affirmatively further fair housing.~~

~~The Analysis of Impediments (AI) to Fair Housing Choice is the primary policy document utilized by HUD grantees for this purpose. HUD encourages jurisdictions to consult with one another and initiate metropolitan-wide planning to address impediments to fair housing choice.~~

The Orange County AI was prepared as a collaborative effort between Aliso Viejo, Anaheim, Buena Park, Costa Mesa, Fountain Valley, Fullerton, Garden Grove, Huntington Beach, Irvine, Laguna Niguel, La Habra, Lake Forest, La Palma, Mission Viejo, Orange, Rancho San Margarita, San Clemente, San Juan Capistrano, Santa Ana, Tustin, Westminster, and the County of Orange. Although the AI addressed county-wide issues, there are also goals specific to each jurisdiction.

Orange County's AI is a thorough examination of structural barriers to fair housing choice and access to opportunity for members of historically marginalized groups protected from discrimination by the federal Fair Housing Act (FHA). The AI also outlines fair housing priorities and goals to overcome fair housing issues. In addition, the AI lays out meaningful strategies that can be implemented to achieve progress towards the County's obligation to affirmatively furthering fair housing. The Lawyers' Committee for Civil Rights Under Law (Lawyers' Committee), in consultation with Orange County jurisdictions and with input from a wide range of stakeholders through a community participation process, prepared the AI.

In addition to participation in the AI, the City has completed the following fair housing outreach and analysis.

Outreach

As discussed in the Housing Plan, the City held a total of two public meetings during the Housing Element update in an effort to include all segments of the community. Each meeting was publicized on the City's website and meeting notices were also sent to persons and organizations with expertise in affordable housing and supportive services. Interested parties had the opportunity to interact with City staff throughout the Housing Element update process and provide direct feedback regarding fair housing issues. In addition, as part of the public outreach efforts, an online survey was conducted regarding housing needs in the community, and the City promoted interest in the Housing Element update with a booth at the local farmers market.

The City also created a dedicated web page for the Housing Element update (https://avcity.org/371/Housing-Element) and provided opportunities for interested persons to participate remotely, which made it possible for those with disabilities limiting their travel to participate and comment on the Housing Element regardless of their ability to attend the meetings.

Assessment of Fair Housing

The following analysis examines geographic data regarding racial segregation, poverty, persons with disabilities, and areas of opportunity as identified by the TCAC/HCD Opportunity Areas map.

Racial segregation. As seen in Figure CP-1, the percentage of non-white population in the city is similar to the adjacent areas and does not indicate any patterns of racial/ethnic concentration in the city.

Poverty. Recent Census estimates regarding poverty status of households in Aliso Viejo are shown in Figure CP-2. As seen in this map, there are no concentrations of poverty and the poverty rate is less than 10% for all Census tracts in the city.

Persons with disabilities. The incidence of disabilities is relatively low in Aliso Viejo compared to some areas of Southern California. As shown in Figure CP-3, the percentage of residents reporting a disability is less than 10% in the majority of the city, while the disability rate is 10% to 20% in some portions of the city.

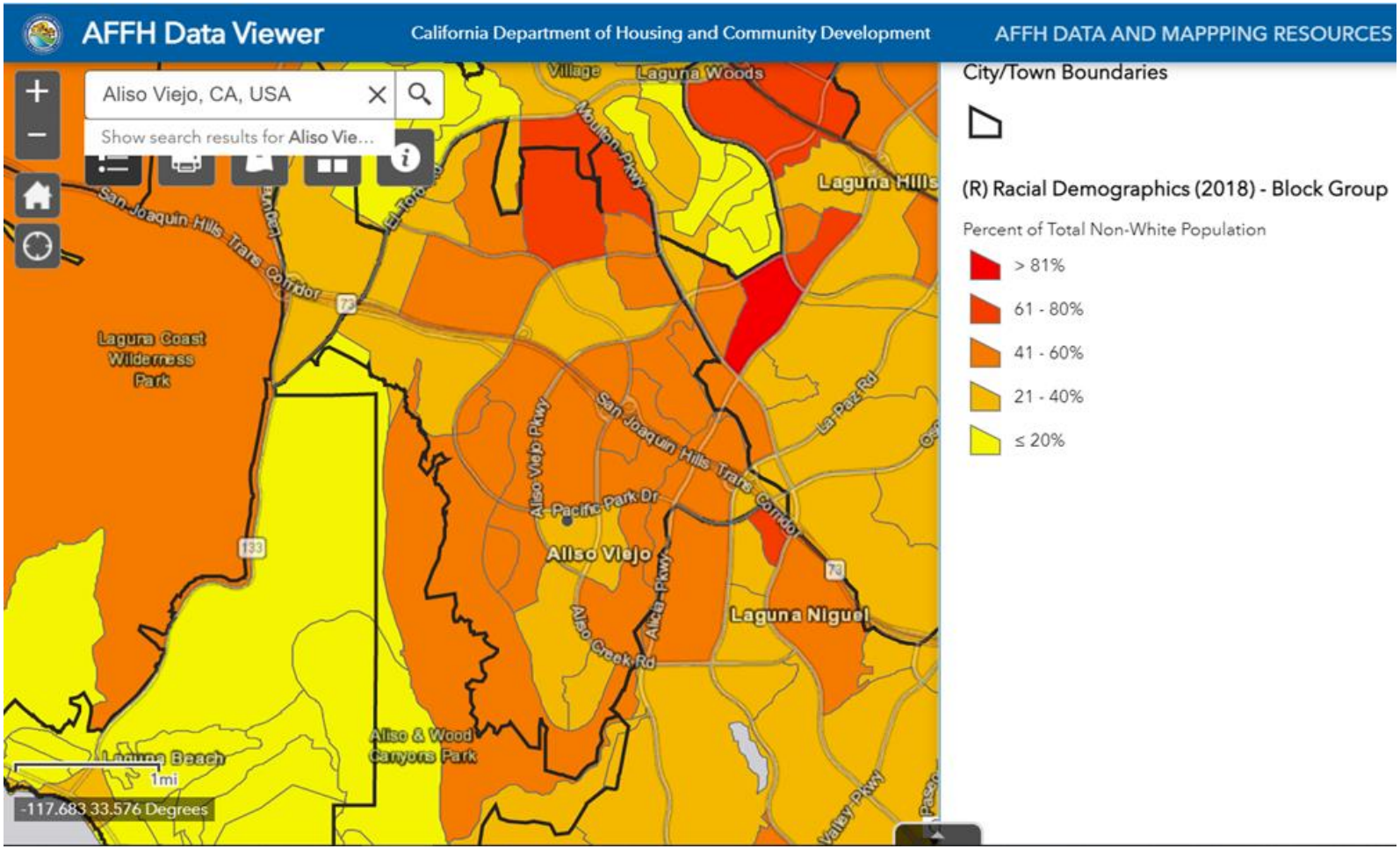
Access to opportunity. According to the 2020 California Department of Housing and Community Development (HCD) and the California Tax Credit Allocation Committee (TCAC) Opportunity Area Map (Figure CP-4), most areas of Aliso Viejo are within designated "High Resource" or "Highest Resource" areas. High Resource areas are areas with high index scores for a variety of educational, environmental, and economic indicators. Some of the indicators identified by TCAC include high levels of employment and close proximity to jobs, access to effective educational opportunities for children and adults, low concentration of poverty, and low levels of environmental pollutants, among others.

Conclusion

This analysis shows that the primary barrier to fair housing in the city is high housing cost, which has the effect of limiting access by lower-income households to the high opportunities and resources available in Aliso Viejo. There is no evidence to suggest that discrimination against racial groups or persons with disabilities is a major issue.

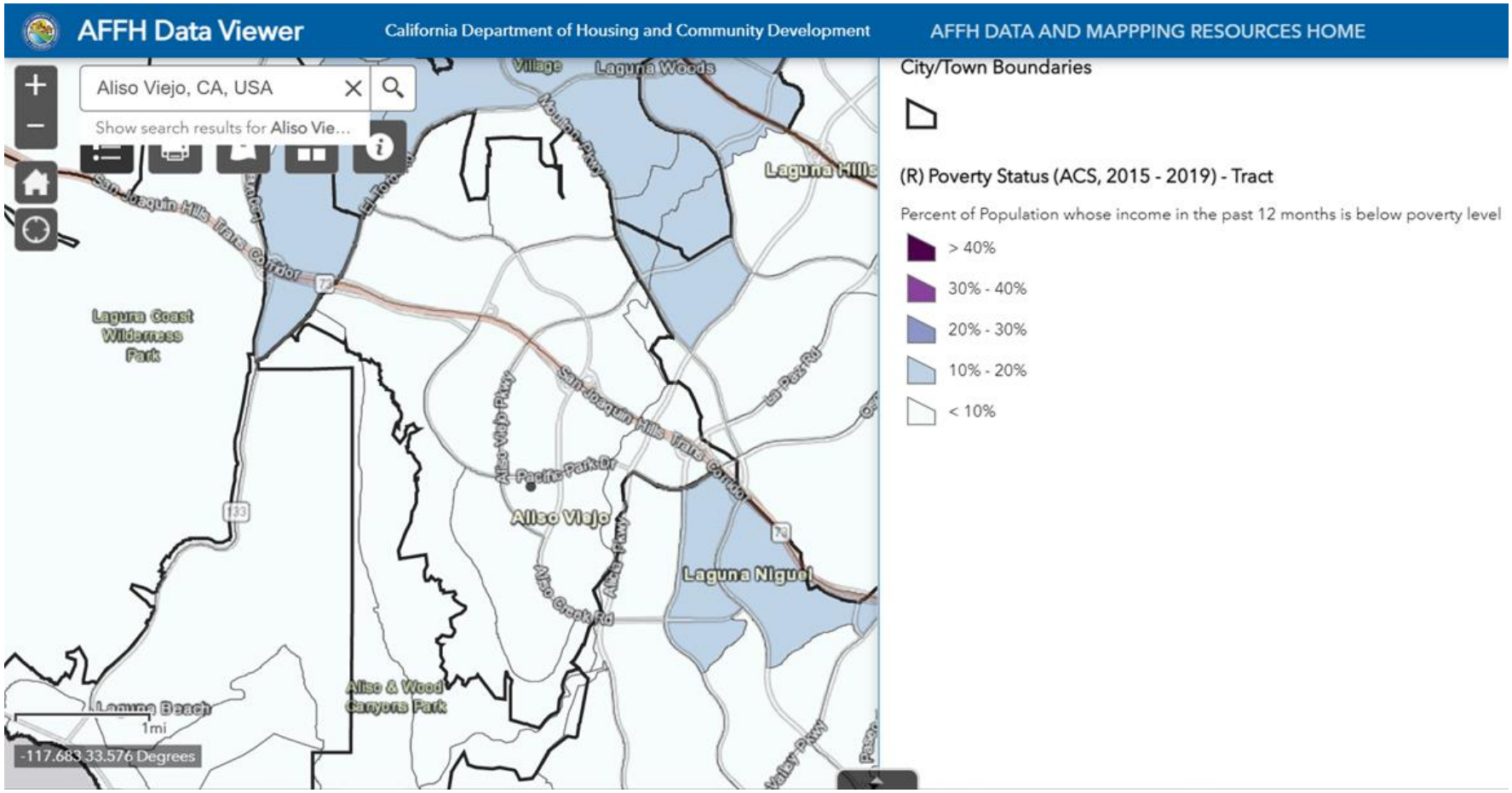
The Housing Plan includes several programs to encourage and facilitate affordable housing development, as well as the provision of accessory dwelling units, which can expand affordable housing opportunities for lower-income persons such as caregivers, household employees, and others working in service occupations. Program 11 describes actions the City will take to affirmatively further fair housing and address any issues of housing discrimination that may arise.

~~Figure CP-1~~
~~Racial Characteristics~~



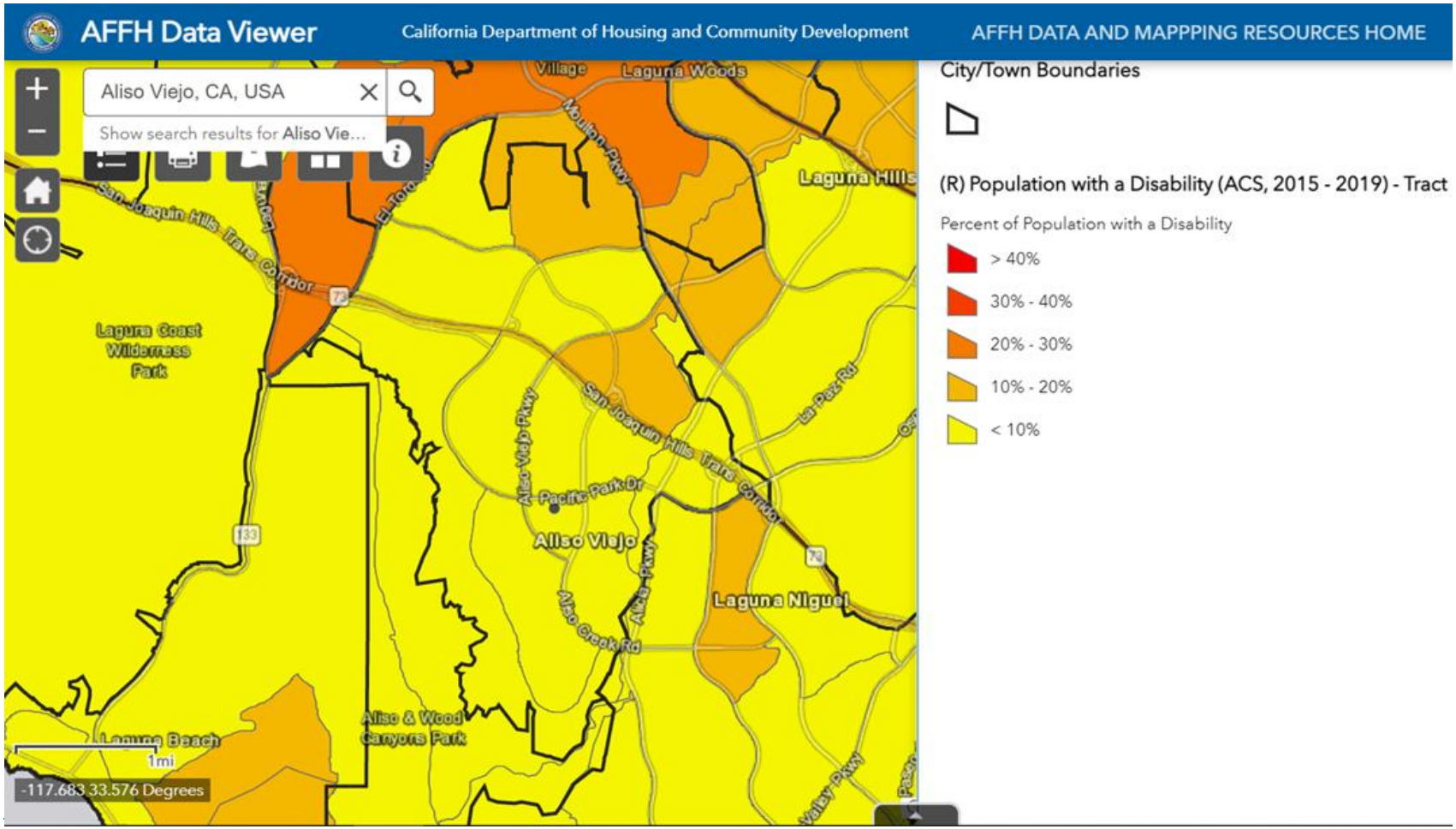
~~Source: California Department of Housing and Community Development, AFFH Data Viewer, 2021~~

~~Figure CP-2~~
~~Poverty Status~~



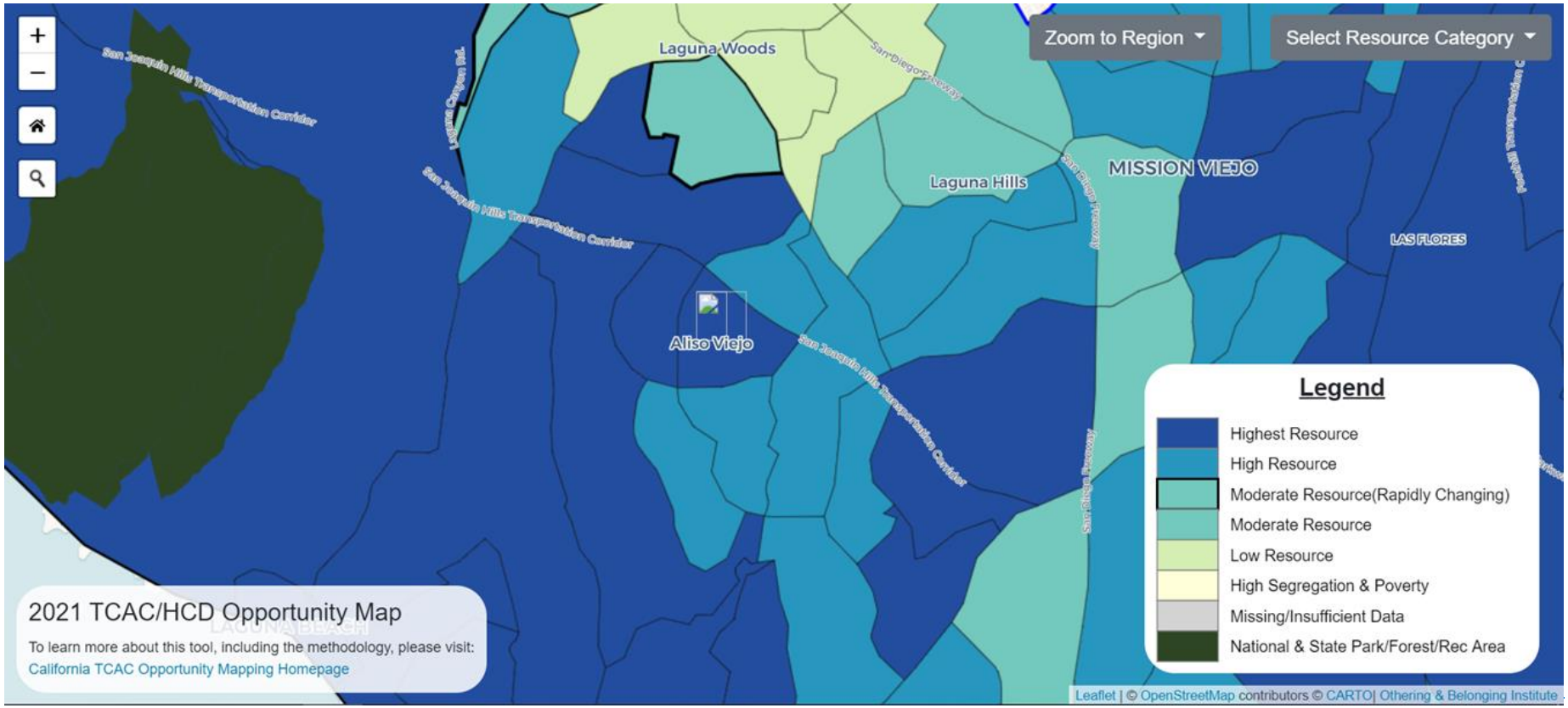
~~Source: California Department of Housing and Community Development, AFFH Data Viewer, 2021~~

~~Figure CP-3~~
~~Disabilities~~



~~Source: California Department of Housing and Community Development, AFFH Data Viewer, 2021~~

~~Figure CP-4~~
~~TCAC/HCD Opportunity Map~~



C.2 RESOURCES AND OPPORTUNITIES

This section analyzes the resources and opportunities available for the development, rehabilitation, and preservation of housing in Aliso Viejo. This analysis includes an evaluation of the availability of land resources for future housing development, financial resources available to support housing activities, administrative resources available to assist in implementing the housing programs, and opportunities for energy conservation.

NEW HOUSING NEEDS

In March 2021 the Southern California Association of Governments (SCAG) adopted the 2021 -2029 Regional Housing Needs Assessment (RHNA) Plan, which assigns a share of the region's future housing need to each jurisdiction in the region. State law requires each community to demonstrate that it has sufficient land with appropriate zoning and development standards to accommodate its assigned housing need. Prior to the City's incorporation in 2001, residential development was subject to the County of Orange Inclusionary Zoning requirements. These requirements stipulated that 25 percent of all units developed in the Aliso Viejo Planned Community would be affordable to low- and moderate-income residents for a period of five years. With 5,823 affordable units developed (2,528 low-income and 3,295 moderate-income units - well above the 25 percent requirement), the County certified the community's compliance with its inclusionary requirements on July 6, 2001.

The City of Aliso Viejo has not adopted an inclusionary housing requirement; however, the City has been able to negotiate with individual developers to incorporate affordable housing into their developments. As an example, the latest project, a 435-unit apartment complex provided 38 affordable rental units.

For the 2021 through 2029 RHNA projection period, the City has been allocated a new housing need of 1,195 dwelling units, distributed by income category as shown in Table CP-24. It should be noted that SCAG did not include the extremely-low-income category when the RHNA was prepared. The need in the extremely-low-income need has been estimated to be half of the very-low category as allowed by state law.

Table CP-24
Regional Housing Needs 2021-2029 – Aliso Viejo

Very Low*	Low	Moderate	Above Moderate	Total
390	214	205	386	1,195

Source: SCAG 2021.
*Includes assumption of 195 extremely-low-income units

RESIDENTIAL SITES INVENTORY

State law requires cities to identify adequate sites with appropriate zoning to accommodate the ~~growth~~ assigned new housing need for the planning period. ~~Table CP-25~~ Section C.5 includes an analysis~~lists~~ of sites in the city with land use designations that allow additional residential development based on current zoning designations.

~~Table CP-25 shows that there are currently insufficient residential sites to accommodate the City's RHNA allocation for all income categories. To accommodate this shortfall, the Housing Element includes Program 1, Adequate Sites for New Housing to amend General Plan and zoning designations for sufficient sites to be selected from the sites listed in Table CP-26 to accommodate the RHNA allocation. Maps showing these candidate sites are provided in Attachment C-1.~~

Table CP-25
Residential Land Inventory

Site	General Plan	Zoning	Acreage	Density	Units by Income Category				Total Units
					VL	Low	Mod	Above Mod	
The Commons at Aliso Viejo Town Center – Towers Planning Area	CBO – The Commons at AV Town Center	SP No. 2 – Commons	4.1	34.1 units/acre	7*	14	119	0	140
Potential ADUs					10	17	12	1	40
Totals			**4.1**		**17**	**31**	**131**	**1**	**180**
Housing Need 2021-2029					**360**	**214**	**205**	**386**	**1,195**
Adequate Sites? (Shortfall)					**(343)**	**(183)**	**(74)**	**(385)**	**(1,015)**

Notes:
* Deed-restricted units

~~Table CP-26~~Table CP-25
Candidate Parcels for Rezoning

Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
1 Columbia	Business Park	BP 2	Office	2	60-100
41 Columbia	Business Park	BP 2	Office	2	60-100
35 Journey	Business Park	BP 1	Office	2	60-100
26800-26880 AV Pkwy	Business Park	BP 1	Office	7	210-350
The Commons	High Density Residential/ Community Commercial	SP 2	Parking lot	21	630-1,050
AVTC Gateway	Community Commercial	CT	Parking lot	6	300
TOTALS				**40**	**1,320-2,000**

FINANCIAL RESOURCES

Affordable Housing In-Lieu Fees

The City allows developers to pay fees in lieu of providing affordable units with the fees deposited to a housing fund. Funds collected to date were spent to assist the 200-unit senior affordable project at 100 Freedom Lane (formerly 4 Liberty) and for the purchase of an affordable unit at 35 Playa Circle. As part of the 100 Freedom development, City in-lieu fees were used to subsidize 50 very-low-income units. The unit at 35 Playa Circle was leased to Family Assistance Ministries (FAM) for $1 per year. FAM has placed a family in the unit. The in-lieu fee program has been successful to date. While all funds have been expended, the monies helped to construct 50 affordable units and purchase an additional standalone affordable unit. Moving forward the City will continue its efforts to collect in-lieu fees and adjust the fees accordingly based on land values.

Low Income Housing Tax Credits (LIHTC)

Created by the 1986 Tax Reform Act, the LIHTC program has been used in combination with other resources to encourage the construction and rehabilitation of rental housing for lower-income households. The program allows investors an annual tax credit over a ten-year period, provided that the housing meets minimum low-income occupancy requirements. The tax credit is typically sold to large investors at a syndication value.

Housing Choice Voucher (Section 8) Program

The Housing Choice Voucher (Section 8) program is a federal program that provides rental assistance to very-low-income persons in need of affordable housing. This program offers a voucher that pays the difference between the fair market rent and 30 percent of their income. The voucher allows a tenant to choose housing that may cost above the payment standard, but the tenant must pay the extra cost. The Orange County Housing Authority (OCHA) administers the Section 8 Voucher Program for Aliso Viejo. As of 2021, approximately 131 households in Aliso Viejo were receiving vouchers.

OPPORTUNITIES FOR ENERGY CONSERVATION

Utility-related costs can directly impact affordability of housing in Aliso Viejo. By promoting and expanding opportunities for energy conservation, the City can indirectly alleviate housing cost burden and improve housing affordability in the community. Opportunities for energy conservation in Aliso Viejo include continued implementation of State Title 24 building construction standards, complying with Energy Star conservation standards, and considering appropriate building orientation and landscaping during the development/design review process through implementation of the Zoning Ordinance. The City requires a minimum of 50 percent of the landscaping to be drought tolerant in new development within Aliso Viejo.

In addition to the numerous environmental benefits discussed in the Conservation/Open Space Element, energy conservation measures implemented by the City can significantly reduce the cost of utilities to community households, thereby reducing housing cost burden and improving overall housing affordability in Aliso Viejo. In 2014 the City adopted a Green Building Program that offers incentives such as expedited processing and/or fee waivers when project proponents agree to incorporate environmentally sensitive sustainable and energy efficient construction techniques into their projects. The City currently offers a 25% permit fee waiver for residential solar thermal system installation. Daytime interior lighting costs can be significantly reduced or eliminated with the use of properly designed and located skylights, which can be easily installed at reasonable expense in existing houses, thereby substantially reducing electricity costs and energy consumption. Solar energy is a practical, cost effective, and environmentally sound way to heat and cool a home.

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C.3 CONSTRAINTS ANALYSIS

Aliso Viejo strives to provide a variety of housing opportunities for current and future residents. However, a variety of factors can constrain the development, maintenance, and improvement of housing. These include market mechanisms, government codes, and physical and environmental constraints. This section addresses these potential constraints that affect the supply and affordability of housing in Aliso Viejo.

MARKET CONSTRAINTS

Land costs, construction costs, and market financing contribute to the cost of housing reinvestment, and can potentially hinder the production of new housing. Although many constraints are driven by market conditions, jurisdictions may have some leverage in instituting policies and programs to address such constraints. The section below analyzes these market constraints as well as the activities that the City undertakes to mitigate their effects.

Development Costs

Construction costs vary widely according to the type of development, with multi-family housing generally less expensive to construct than single-family homes. However, wide variation within each construction type exists depending on the size of the unit and the number and quality of amenities provided, such as fireplaces, swimming pools, and interior features among others. The City has no influence over materials and labor costs, and the building codes and development standards in Aliso Viejo are not substantially different than most other cities in Orange County. Construction costs for materials and labor have increased at a higher pace than the general rate of inflation. In addition, as the supply of buildable vacant land is exhausted, housing development must occur on underutilized land, adding the expense of demolition to the total cost of development. The International Code Council estimated that the average construction cost for good-quality housing was approximately $131 per square foot for single-family homes and $119 per square foot for multi-family housing; however, costs can significantly exceed these amounts depending on a variety of factors.

Cities have little control over materials and labor costs; however, Housing Programs 1, *Adequate Sites for Affordable Housing* can reduce the cost of development for projects by assuming the cost of amending the General Plan and Zoning designations to allow for additional residential development. Furthermore, as described in Housing Program 2, *Facilitate the Provision of Affordable Housing*, assistance to non-profit developers of affordable developments can also offset the cost of development.

Land Costs

The cost of raw land typically accounts for a large share of total housing production costs. Land costs may vary depending on whether the site is vacant or has an existing use that must be removed. Similarly, site constraints such as environmental issues (e.g., steep slopes, soil stability, seismic hazards, or flooding) can be a factor driving up the cost of developable land.

Prices also vary depending on density, proximity to the coast and neighborhood characteristics. Recent asking prices for developable land in Aliso Viejo have been in excess of $1 million per acre. Higher density reduces per-unit land costs. Aliso Viejo is a relatively high-density community in comparison to other cities in southern Orange County, and as noted previously, approximately 65 percent of the housing stock is attached housing, either condo or apartments. Therefore, although the price of land is expected to comprise a significant portion of the cost of housing, the City's zoning regulations allowing densities up to 50 units per acre serves to ameliorate this factor.

Cost and Availability of Financing

Aliso Viejo is typical of Southern California communities with regard to the availability of home financing and interest rates. In recent years, mortgage interest rates have been very low by historic standards, resulting in increased affordability for home purchasers with good credit.

GOVERNMENTAL CONSTRAINTS

Local policies and regulations can impact the price and availability of housing and, in particular, the provision of affordable housing. Land use controls, site improvement requirements, fees and exactions, permit processing procedures, and other factors may constrain the maintenance, development, and improvement of housing.

Land Use Controls

Nearly all of the land in Aliso Viejo has either been developed or is permanently preserved for open space or recreation. The City was designed as a balanced planned community and the Land Use Element designates approximately 1,500 acres, or 40 percent of the City's land area, for a wide variety of residential uses to ensure adequate housing opportunity for its residents. The distribution of residential uses specified in the Land Use Element is depicted on the Land Use Policy Map and includes:

- Very Low Density Residential (VLDR) – maximum 5 units per acre
- Low Density Residential (LDR) – maximum 8 units per acre
- Medium Density (MDR) – maximum 18 units per acre
- High Density (HDR) – maximum 30 units per acre
- Very High Density Residential (VHDR) – up to 50 units per acre

VLDR and LDR uses account for 45 percent of all residential uses in Aliso Viejo, while MDR constituted 33 percent. HDR uses are 20 percent of the overall residential mix and the remaining 2 percent is comprised of VHDR uses.

Residential Development Standards

Most of Aliso Viejo is built out and the community has very few opportunities for new development. The City is comprised of portions of two master-planned communities: Aliso Viejo Planned Community and the Rossmoor Leisure World Planned Community. The area in northern Aliso Viejo that was part of the Rossmoor Leisure World Planned Community represents a small percentage of the City's land. There are no opportunities for new development in this area and the potential for redevelopment is low as existing uses are in good condition. There are limited opportunities for new development and redevelopment in the remaining portions of the City that were part of the Aliso Viejo Planned Community.

The portion of the city within the Aliso Viejo Planned Community (PC) was originally regulated by the Aliso Viejo Planned Community Development Plan and Supplemental Text, approved by the County of Orange prior to the City's incorporation in 2001. Upon incorporation, the City adopted the existing County PC regulations. In 2008 the City adopted a new Zoning Code that superseded the original PC regulations and established development standards for residential land uses. Effective February 19, 2010 the residential development standards were amended, as summarized in Table CP-26. The purpose and density of each residential district is as follows:

- RL Residential - Low Density District. To provide for the development and preservation of low-density neighborhoods with single-family detached or attached residences and condominiums. Maximum density is 8 units per gross acre.
- RM Residential - Medium Density District. To provide for the development and preservation of medium-density neighborhoods containing detached and attached single-family homes on smaller lots, duplexes, townhomes, apartments, and condominiums. Each project will have ample common open space and recreation facilities. Maximum density is 18 units per gross acre.
- RH Residential - High Density District. To provide for the development and preservation of high-density neighborhoods consisting primarily of attached and multiple dwelling units such as townhomes, apartments, condominiums, and senior housing. Each project will have ample common open space and recreation facilities. Maximum density is 30 units per gross acre.

- RVH Residential - Very High Density District. To provide for the development and preservation of very-high-density neighborhoods consisting primarily of multiple dwelling units such as apartments, condominiums, and senior housing. Each project will have ample common open space and recreation facilities. Maximum density is 50 units per gross acre.
- PRD Planned Residential Development Overlay District. This is an overlay district which is to be combined with one of the residential base districts described above. The PRD overlay district provides for the development and preservation of planned unit developments with attached homes, detached homes, or a mixture of both. Each project will have ample common open space and recreation facilities. Setbacks and other development standards are to be tailored specifically to each project.

~~Table CP-27~~Table CP-26
Residential Development Standards

	RL		RM	RH	RVH	PRD [c]
	Single-Family Detached	Single-Family Attached				
Height and Area Standards						
Maximum structure height [a]	35 feet, maximum 2 stories (lofts do not count as a separate story)		35 feet	45 feet	65 feet	Same as base district
Building site area, min. (sq/ft)	3,000		5,000	5,000	5,000	
Building site coverage for entire project at initial development	No maximum		60%	60%	60%	
Min. Common Open Area (in addition to boundary landscaping), subject to sec. 15.14.120	n/a		25%	25%	25%	
Minimum Building Setbacks [b]						
Front	10 feet	10 feet	For single-family detached and attached: same setbacks as RL; otherwise, n/a	n/a	n/a	As approved for each project
Side	10 ft. for one side only; or 10 ft. aggregate for both sides	0 ft. on attached side; 10 ft. on open side				
Rear	10 feet	10 feet				
Minimum Perimeter Setback	n/a	n/a	20 feet	20 feet	20 feet [d]	20 feet [d]

Landscaping			
Minimum Boundary Landscaping, subject to sec. 15.14.120	n/a	n/a	For multifamily, 15 feet min., 20 feet min. avg.
Minimum Parking Lot Landscaping	n/a		Min. 4% of parking lots serving 10 or more cars shall be landscaped in addition to boundary landscaping.
Drought Tolerance	n/a		Min. 50% of landscaping must be drought tolerant.

Source: Aliso Viejo Zoning Code, 2013

a See Chapter 15.30 for additional provisions regarding height limits.

b Setbacks are measured from ultimate street right-of-way line. Also, setbacks are subject to the provisions of sec. 15.14.040 (Encroachments into Setbacks).

c The PRD standards shown are for projects approved after the effective date of this Code. For projects approved prior to the effective date of this Code, setbacks and other development standards shall be as established by the buildings as they exist on the effective date of this Code.

d All min. perimeter setbacks shall be increased 1 foot for every foot in height above 35 feet

Community Benefit Overlay (CBO)

The City's General Plan identified several areas in which alternative standards could be used to maximize development in certain areas. For each CBO area, the General Plan identifies the most intensive future use scenario while also allowing for up to two alternatives to allow for flexibility. All of the CBO areas have been developed except for the Enterprise/Aliso Creek Road CBO which lies in the Commons at Aliso Viejo Town Center. This is the area that was approved through Specific Plan for the Towers development.

Parking Standards

Overly stringent parking standards may pose a constraint to housing development and reduce the viability of potential affordable housing projects by reducing the number of units that can be built. The City's parking standards are contained in Chapter 15.50 of the Zoning Code and are shown in Table CP-27 below. As noted in this table, required parking for multi-family units may be provided in a garage or a carport. Reduced parking requirements are available for qualifying projects such as when affordable units are provided. The City's parking standards are generally in line with HCD's Building Blocks provided to local jurisdictions for guidance on parking requirements. The difference being that the City's standards are per unit and not per bedroom count for single family homes. For multifamily apartments there is a per-bedroom requirement that is slightly higher than that recommended by the Building Blocks due to the lack of public transportation in the area. The number of spaces required in multifamily apartments ranges from 1.5 to 2.5 spaces per unit, which is 0.25 to 0.75 spaces more than the Building Blocks recommendation. However, the City will be updating its standards and moving to a bedroom count to more closely reflect parking need based on size and number of bedrooms in the unit.

~~Table CP-28~~Table CP-27
Parking Requirements by Use

Land Use	Minimum Off-Street Parking Requirement	Additional Requirements
Single family detached and single family attached	2 spaces per unit in a garage plus 1 space for any second dwelling unit (which may be a tandem driveway space, subject to §15.14.080)	Plus 0.5 off-street guest spaces per unit if there is no on-street parking in front of the units. Each garage space shall have minimum unobstructed interior dimensions of 10 ft. x 20 ft.
Multifamily dwellings, townhomes	2 spaces per unit in a garage	
Multifamily dwellings, apartments (either rental or condominium): Studio: 1 bedroom: 2 bedrooms or more bedrooms:	 1 covered space per unit 1.2 covered spaces per unit 2 covered spaces per unit	Plus 0.5 guest spaces per unit, with parking distributed so that all units are within 150 feet of the resident's assigned or reasonably available parking space and within 150 feet of the nearest designated guest space.
Affordable housing (Ch. 15.58): Studio to 1 bedroom: 2-3 bedrooms: 4 or more bedrooms:	 1 space per unit 2 spaces per unit 2.5 spaces per unit	Spaces may be tandem or uncovered.
Live/work and other mixed use developments	2 spaces per unit in a garage plus the spaces required for the nonresidential uses per this chapter; or as required in applicable specific plan	Each garage space shall have minimum unobstructed interior dimensions of 10 ft. x 20 ft.
Mobilehome parks	2 covered spaces per unit, which may be in tandem, plus 0.5 guest spaces per unit	
Single-room occupancy housing	1 space per dwelling unit	
Boarding or rooming houses	1 space per sleeping room	
Managed care: assisted living, congregate care facilities, and other senior group housing (age restricted)	1 space per dwelling unit; or 0.5 spaces per bed in dormitory housing	If the number of beds is uncertain at the time of City review, the requirement shall be 0.5 spaces per each 100 sq/ft of sleeping area
Managed care: convalescent homes	0.5 spaces per bed	
Homeless and emergency shelters	0.3 spaces per bed*	If the number of beds is uncertain at the time of City review, the requirement shall be 0.3 spaces per each 100 sq/ft of sleeping area
Transitional and supportive housing	1 space per dwelling unit; or 0.3 spaces per bed in dormitory housing	
Alcoholism or drug abuse recovery facilities and residential care facilities; all for 6 or fewer persons	As required for the single family or multifamily dwelling unit in which the facility is located	

*See Program 10 in the Housing Plan

Impact of Land Use Controls

The City has traditionally not placed over-regulatory burdens on land use development, specifically for residential units. There are no development impact fees or exactions adopted as part of the code nor have developers found it difficult to meet parking and landscaping ratios. In two recent cases modifications to development standards were approved for the two affordable housing projects approved at 100 Freedom Lane, which provided 198 and 200 units of affordable housing. A reduction in required parking was approved for these projects, resulting in additional units. However, there have been numerous complaints from area residents regarding the lack of adequate parking. This is

something that the property owner/manager have been working to address. The 435-unit apartment development at Vantis, on the other hand, was able to provide the required parking through a structure as a podium project. This is a market-rate project with 38 affordable units provided. As noted above, the City will evaluate and adopt new parking standards to more closely reflect need based on unit size/bedroom count.

Condominium Conversions

Chapter 15.54 of the Zoning Code addresses the conversion of affordable units to ownership (condominium) units. The chapter includes a variety of provisions that are intended to preserve affordable housing opportunities, create additional affordable housing, and ensure that any housing stock that may be approved for an ownership opportunity be evaluated for compliance with construction and housing codes to ensure that the units are safe, sanitary, and livable. Primary features of the chapter include a requirement of an apartment vacancy rate of more than 5 percent unless mitigating circumstances are found by the City Council. The chapter also requires that 15 percent of converted units be affordable to very-low- and low-income households, as well as a requirement to provide tenant relocation assistance. All affordable units are required to be sold with an affordability covenant that restricts the sale of the unit to a low-income or very-low-income buyer in accordance with the terms set forth in Subchapter 2 of Chapter 6.5 of Division 1 of Title 25 of the *California Code of Regulations*.

Affordable Housing Incentives

Chapter 15.58 of the Zoning Code contains regulations and procedures for approval of a density bonus as well as additional incentives for affordable or senior housing. AB 2345 of 2019 amended State law to revise density bonus incentives that are available for affordable housing developments. Program 2 is included in the Housing Plan to update the City's density bonus regulations in conformance with State law.

Accessory Dwelling Units

Section 15.14.080 of the Zoning Code contains regulations and procedures for approval of accessory residential units (ADUs) and junior accessory dwelling units (JADUs). Program 11 in the Housing Plan includes a provision to monitor changes to State law and update City regulations as necessary to ensure consistency~~This section of the Code is consistent~~ with current ~~State~~ law.

Provision for a Variety of Housing

A balanced community must offer a range of housing options for all economic segments of the population. This includes single-family housing, multi-family housing, factory-built or manufactured housing, mobile homes, reasonable accommodation in housing for persons with disabilities or special needs, emergency shelters, and transitional housing among others. Permitted residential land uses are summarized in Table CP-28.

~~Table CP-29~~Table CP-28
Permitted Residential Land Uses by District

Residential Uses	RL Low Density Residential	RM Med. Density Residential	RH High Density Residential	RVH Very High Density Res.
Single-family dwellings, detached	P	P	NP	NP
Single-family dwellings, attached	P	P	P	P
Multifamily dwellings	NP	P	P	P
Single-room occupancy housing	NP	P	P	P
Boarding and rooming houses	NP	C	C	C
Individual manufactured homes including mobilehomes on single family lots, subject to sec. 15.14.100	P	P	NP	NP
Mobilehome parks and developments, subject to sec. 15.14.100	C	C	C	C
Alcohol or drug abuse recovery or treatment facilities that are licensed by the State for up to six persons	P	P	NP	NP
Homeless and emergency shelters[1]	NP	C	C	C
Transitional and supportive housing	P	P	P	P
Accessory dwelling units subject to AVMC Sec. 15.14.080	A	A	NP	NP
Guest houses, subject to AVMC Sec. 15.14.090	A	A	NP	NP

P=permitted C=conditionally permitted A=accessory use NP=not permitted
1. Emergency shelters are permitted in the BP-1 and BP-2 zones by-right

Multi-Family Units: Multi-family residential is a permitted use with a Site Development Permit for the site and architectural design in the RM, RH, and RVH zoning districts (Table CP-26), although most of the land within these areas has already been built out. Future multi-family development can be achieved on the few remaining vacant properties with a change of zoning and general plan designation.

Manufactured Housing: Manufactured housing offers an affordable homeownership option to many low- and moderate-income households. In accordance with State law, the City of Aliso Viejo allows individual manufactured housing by right in the RL and RM residential zones providing these units are built to meet the California Building Code in accordance with applicable factory-built regulations.

Agricultural Employee Housing: As discussed previously in the Housing Needs Assessment, recent Census estimates reported no residents of Aliso Viejo were employed in farming, fishing and forestry occupations. Commercial agriculture is not permitted in any zoning district. The City's overall efforts to provide and maintain affordable housing opportunities will help to support any agricultural employees in other areas that may choose to reside in Aliso Viejo. In addition, Program 10 includes a Zoning Code amendment to allow agricultural employee housing for six or fewer employees as a single-family structure and permitted in the same manner as other dwellings of the same type in the same zone consistent with the Employee Housing Act (Health and Safety Code §17021.5).

Residential Care Facilities: Residential care facilities can be described as any family home, group care facility, or similar facility for 24-hour non-medical care of persons in need of

personal services, supervision, or assistance essential for sustaining the activities of daily living. The Zoning Ordinance includes definitions for residential care facilities but does not identify any zones where such facilities are permitted. The Zoning Ordinance defines "Health facilities" as "a facility, place or building that is organized, maintained, and operated for the diagnosis, care, prevention, and treatment of human illness, physical or mental, including convalescence and rehabilitation and including care during and after pregnancy, or for any one or more of these purposes, for one or more persons, to which the persons are admitted for a 24-hour stay or longer" consistent with California Health and Safety Code §1250. Health facilities are allowed subject to a CUP in the Professional Office and Business Park-1 districts.

Alcoholism or drug abuse recovery or treatment facilities that are licensed by the State for a maximum capacity of six or fewer persons are permitted in all residential zoning districts consistent with State law.

Housing for Persons with Disabilities: Both the Fair Housing Act and the California Fair Employment and Housing Act require local governments to make reasonable accommodation (i.e., modifications or exceptions) in their zoning laws and other land use regulations when such accommodations may be necessary to afford persons with disabilities an equal opportunity to use and enjoy a dwelling. For example, it may be a reasonable accommodation to waive a setback requirement so that a paved path of travel can be provided to residents who have mobility impairments. A similar waiver might not be required for a different type of group home where residents are not physically disabled. Whether a particular modification is reasonable depends on the facts, and must be decided on a case-by-case basis. Chapter 15.66 of ~~T~~the Zoning Code ~~includes~~ establishes procedures for ensuring reasonable accommodation, including timeframes for decision making, and provision for relief from various land use, zoning, or building regulations that may constrain the housing for persons with disabilities.

Notice of the availability of reasonable accommodation and application forms are prominently displayed at the City's public counter advising the public of the availability of the procedure for individuals with disabilities. After submittal of a reasonable accommodation request, the Director of Planning reviews the application and issues a decision within 30 days. The Director's decision to grant, grant with modifications, or deny a request for reasonable accommodation shall be consistent with fair housing laws and based on the following findings, all of which are required for approval:

1. The housing, which is the subject of the request for reasonable accommodation, will be used by an individual with disabilities protected under fair housing laws.
2. The requested accommodation is necessary to make housing available to an individual with disabilities protected under the fair housing laws.
3. There are no alternatives which may provide an equivalent level of benefit.

4. The requested accommodation would not impose an undue financial or administrative burden on the city.

5. The requested accommodation would not require a fundamental alteration in the nature of the City's land use, zoning or building policies, practices or procedures.

6. The requested accommodation will not result in a direct and significant threat to the health or safety of other individuals or substantial physical damage to the property of others.

Within 10 days of the Director's decision, an applicant may appeal the decision to the City Council. Upon request, the City will provide assistance to an individual needing assistance in filing an appeal to ensure that the appeals process is accessible to individuals with disabilities.

These procedures are consistent with fair housing law and do not pose a constraint on persons with disabilities. In recent years the City has typically processed about one reasonable accommodation request per year.

Definition of *Family*: The Zoning Code defines *Family* as "one or more related or unrelated persons occupying a dwelling unit and operating as a single housekeeping unit. "Family" does not include occupants of a fraternity, sorority, boarding house, short-term rental, lodging house, club, motel, or any other type of transitory lodging." This definition is consistent with applicable law and does not pose a constraint to persons with disabilities.

Emergency Shelters ~~and Transitional/Supportive Housing~~: Emergency shelters can be defined as charitable or public service facilities that provide temporary 24-hour shelter services to the homeless. The Zoning Ordinance allows emergency shelters by-right, without discretionary action, in the Business Park 1 and Business Park 2 districts. The BP districts encompass approximately 240 acres conveniently located with access to transit and services required by homeless persons. The primary purpose of the BP-1 district is to provide business and employment-generating development, including a range of light industrial uses and supporting offices and services consistent with the General Plan business park designation. The primary purpose of the BP-2 district is to provide for a wide range of industrial, research, manufacturing, storage, and warehouse uses that may not be desirable in the BP-1 district. Development standards for emergency shelters are the same as for other uses in the BP-1 and BP-2 zones~~designed to permit a variety of uses including community facilities and limited service and retail offices~~. There are no hazardous conditions that are inappropriate for human occupancy in these areas. As noted previously in the analysis of special needs, the most recent point-in-time survey (2019) identified one unsheltered person in Aliso Viejo. Approximately twelve developed parcels with vacant or underutilized space that could accommodate emergency shelters are located within the BP

districts, providing more than sufficient capacity to accommodate shelters to address this need.

Low Barrier Navigation Centers: In 2019 the State Legislature adopted AB 101 establishing requirements related to local regulation of low barrier navigation centers, which are defined as "Housing first, low-barrier, service-enriched shelters focused on moving people into permanent housing that provides temporary living facilities while case managers connect individuals experiencing homelessness to income, public benefits, health services, shelter, and housing." Low Barrier means best practices to reduce barriers to entry, and may include, but is not limited to:

(1) The presence of partners if it is not a population-specific site, such as for survivors of domestic violence or sexual assault, women, or youth
(2) Accommodation of residents' pets
(3) The storage of possessions
(4) Privacy, such as partitions around beds in a dormitory setting or in larger rooms containing more than two beds, or private rooms

Low barrier navigation centers meeting specified standards must be allowed by-right in areas zoned for mixed use and in nonresidential zones permitting multi-family uses. Program 10 is included in the Housing Plan to update City regulations consistent with State law.

Transitional/Supportive Housing: Transitional housing is a type of rental housing used to facilitate the movement of homeless individuals and families to permanent housing. Transitional housing may include case management and support services to return people to independent living as soon as possible, typically between 6-24 months. Supportive housing offers support services to residents who may have longer-term disabilities.

Transitional/supportive housing can take several forms, including group quarters with beds, single-family homes, and multifamily apartments. The Zoning Code specifies that Transitional / Supportive Housing is a residential use that is subject only to the same regulations that apply to other residential uses of the same type in the same zone in compliance with SB 2. In 2018 AB 2162 amended State law to require that supportive housing be a use by-right in zones where multi-family and mixed uses are permitted, including non-residential zones permitting multi-family uses, if the proposed housing development meets specified criteria. Program 10 is included in the Housing Plan to update City regulations consistent with State law.

Planning and Development Fees

Planning and development fees can increase the cost of housing and pose a constraint to the development of affordable housing projects (see Table CP-29). While fees affect the cost of housing, they are necessary for the City to continue providing essential planning and building services, and do not exceed the actual cost of providing these services. Actual

processing costs reflect a 100 percent cost recovery system. The only development impact fees that have been collected in the City are for projects with a development agreement. A multi-family project with a site development permit does not require a development agreement unless the developer requests such agreement. As of 2021, the fees to develop a typical single-family unit within a development (example: 2,150-square-foot house with 504-square-foot garage) and multi-family unit (10,142-square-foot 7-plex with 3,190-square-foot garage) without a subdivision or development agreement are as follows:

~~Table CP-30~~Table CP-29
Planning and Development Fees

Permit Process	Single Family Development[1] (per unit)	Multifamily Development[2]
Planning: Site Development Permit	Site Development Permit: Cost Recoverable	Site Development Permit: Cost Recoverable
Building: Plan Check Fee	$2,091.84	$6,474.94/structure
Building: Permit Fee	$3,218.20	$9.961.46/structure
Building: Issuance	$82.40	$82.40/structure
Building: Mechanical	$399.11	$2,793.00/structure
Building: Plumbing	$267.00	$1,869.00/structure
Building: Electrical	$389.96	$2,201.36/structure
City General Plan:	$576.80	$2,415.43/structure
State Building Fees: Strong Motion Implementation Program	$53.56	$224.29/structure
Construction/Demolition Fee: Recoverable Deposit: Water Quality:	$211.83 (4% of valuation not to exceed $50,000) $16,480.00 $229.00	$180.00/structure (4% of valuation not to exceed $50,000) $50,000.00 $229.00
Scanning $1.00/page	($1.00/page) $200.00 est.	($1.00/page) $300.00 est.
State Building Fees: SB 1473	$17.00	$70.00/structure
State CASp Fee: AB 1379	$4.00	$4.00
Road Fees: San Joaquin Hill Transportation Corridor Agency	$5,893.00	($3,432.00/unit) $24,024.00
Road Fees: Coastal Area Road Improvements and Traffic Signals	$2,958.00	($2,367.00/unit) $16,569.00.00
Road Fees: Moulton Parkway	$609.00	($609.00/unit) $4,263.00
School Fees: Capistrano Unified School District (Paid at school)	($4.08 per square foot, with the exception of properties within a development that includes a Mello-Roos) $8,772.00	($4.08 per square foot, with the exception of properties within a development that includes a Mello-Roos.) $41,379.36
Impact Fees: Park, Open Space/Recreation, Water Connection, and Sewer Connection, Storm Drain	$0	$0
Est. Total Fees	**$42,452.70**	**$163,040.24 ($23,291.46 for each unit within the 7-plex)**

Permit Process	Single Family Development[1] (per unit)	Multifamily Development[2]
Total fees as percentage of building valuation	**10.3%**	**9.5%**

Notes:
1. Based on 2,150-square-foot living area with 504-square-foot garage (valuation $412,000.00)
2. Based on 7-plex, 10,142-square-foot living are with 3,190-square-foot garage (valuation $1,725,308.00)
Source: City of Aliso Viejo, 2021

In summary, planning and building fees represent approximately 10 percent of total development cost.

On- and Off-Site Improvements

City road standards vary by roadway designation as provided in Table CP-30.

~~Table CP-31~~Table CP-30
Road Improvement Standards

Roadway Designation	Number of Lanes	Right-of-Way Width	Curb-to Curb Width
Major Highway	6	120	102
Secondary Highway	4	80	64
Collector Street	2	64	40
Local Street	2	60	36
Cul-De-Sac	2	52-56	36-40

Source: City of Aliso Viejo General Plan - Circulation Element.

A local residential street requires a 60-foot right-of-way, with two 18-foot travel lanes. The City's road standards are typical for cities in Orange County and do not act as a constraint to housing development.

After the passage of Proposition 13 and its limitation on local governments' property tax revenues, cities and counties have faced increasing difficulty in providing public services and facilities to serve their residents. One of the main consequences of Proposition 13 has been the shift in funding of new infrastructure from general tax revenues to development impact fees and improvement requirements on land developers. As part of a Development Agreement, the City could require developers to provide on-site and off-site improvements necessary to serve their projects. Such improvements may include water, sewer and other utility extensions, street construction and traffic control device installation that are reasonably related to the project. Dedication of land or in-lieu fees may also be required of a project for rights-of-way, transit facilities, recreational facilities, and school sites, consistent with the Subdivision Map Act.

The City's Capital Improvement Program (CIP) contains a schedule of public improvements including streets, bridges, overpasses and other public works projects to facilitate the continued build-out of the City's General Plan. The CIP helps to ensure that construction of public improvements is coordinated with private development.

Although development fees and improvement requirements increase the cost of housing, cities have little choice in establishing such requirements due to the limitations on property taxes and other revenue sources needed to fund public services and improvements.

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 be a constraint to housing development if they place an undue burden on the developer.

The process to obtain a development permit begins when a project proponent submits a project proposal to the City. For projects identified as "permitted" (see Table CP-28) such as ~~a typical~~ single-family and multi-family projects, a Site Development Permit is required. The purpose of an SDP for a residential project is to confirm that the physical design of the project is consistent with development standards and design guidelines set forth in the zoning regulations. Unlike a conditional use permit, the SDP process does not examine the appropriateness of the use itself. The Director of Planning Services has the discretion to administratively approve a Site Development Permit or forward it to the City Council. The Decision of the Director is based on the following required Aliso Viejo Municipal Code findings:

1. Consistency with General Plan. The project is consistent with the general plan and any applicable specific plan.

2. Consistency with Zoning Code. The land use and associated development conform to the permitted use provisions and development standards of this zoning code and is consistent with this code and any applicable specific plan.

3. Compliance with CEQA. Processing and approval of the permit application are in compliance with the requirements of the California Environmental Quality Act.

4. Architectural Design. The architectural design of the project, including but not limited to the architectural style, scale, building mass, materials, colors, architectural details, and roof style, is compatible with surrounding development.

5. Site Design. The site design of the project, including but not limited to project entries, interior circulation, pedestrian and bicycle access, pedestrian amenities, screening of equipment and trash enclosures, exterior lighting, and other site design elements, is compatible with surrounding development.

6. Landscape Design. Project landscaping, including but not limited to the location, type, size, color, texture, and coverage of plant materials, has been designed so as to provide visual relief, complement buildings, visually emphasize prominent design elements and vistas, screen undesirable views, provide a harmonious transition

between adjacent land uses and between development and open space, and provide an overall unifying influence to enhance the visual continuity of the project.

The typical length of time for a Site Development Permit approved by the Director is two months. If the Director forwards the application to City Council, the typical process is four months. Once the site development permit is approved, a Building Permit, which is ministerial, is required. The permitting process is as follows:

- Applicant submits three sets of a site plan, floor plans, and elevations to the Building department. Additionally, the Applicant submits a Building Permit application with the required fee based on the valuation of the project.
- The application is taken in for a plan check, which is completed within ten business days. If revisions are necessary, the plans and comments are routed back to the Applicant. Following receipt of the revisions, Staff has five business days to review.
- Once the plan check is complete, the building permit department is able to issue the permit. It is incumbent upon the applicant to call for inspections once construction commences.

Very few residential projects require a conditional use permit (see Table CP-28). For those that do require a CUP, the process takes between four and six months. Applicants must submit site plans, floor plans and elevations along with public noticing labels. Staff reviews the application for completeness, transmits the plans when appropriate to the Public Works Department, Building Department, Orange County Fire Authority and Police Services. Comments are collected and provided to the application so that any necessary changes can be made and plans resubmitted. The application is then presented to the City Council for review. Required findings for approval are as follows:

1. Consistency with General Plan. The land use is consistent with the general plan and any applicable specific plan.

2. Consistency with Zoning Code. The land use and associated development conform to the permitted use provisions and development standards of this zoning code and are consistent with this code and any applicable specific plan.

3. Compliance with CEQA. Processing and approval of the permit application are in compliance with the requirements of the California Environmental Quality Act.

4. Surrounding Uses. Approval of the application will not create conditions materially detrimental to the public health, safety and general welfare or injurious to or incompatible with other properties or land uses in the vicinity.

Given the built-out character of the City, remaining development potential is fairly limited. The City does not have a backlog of development applications and is able to process

applications in a timely manner. The City's development standards and Site Development Permit procedures provide clear, objective guidelines for developers and help to minimize the time required to obtain approval, which helps to reduce overall development cost. While current procedures do not pose unreasonable constraints, the City is currently developing permit tracking software to streamline the development review process.

The City has not experienced requests to develop at lower densities than anticipated in the sites inventory.

Building Codes and Enforcement

The City has adopted the 2019 California Building Codes, which include the California Building Code, California Residential Code, California Plumbing Code, California Mechanical Code, California Electric Code, California Fire Code, California Green Buildings Standards Code, California Energy Code, California Administrative Code, and the California Referenced Standards Code. While adding to the cost of residential development, enforcement of the California Building Code is necessary to ensure the safety of current and future residents of Aliso Viejo.

Local amendments to the building codes were limited to:

- Ensuring swimming pool safety measures were in place as they were not carried forward in the 2019 Building Codes,
- Providing additional regulations in High Fire Severity Zones to ensure appropriate fuel medication standards
- Streamlined processing of permits for electric vehicle charging stations
- Standards for grease interceptors for businesses
- Proper address identification

These amendments are intended to promote public safety and do not pose a substantial constraint to the provision of housing. The fuel medication standards are the most stringent part of the local amendments; however, they do not create a burden or increase costs for individual homeowners because they are typically implemented by the homeowner's associations who maintain common landscape areas.

Code enforcement is primarily complaint-based. Complaints are investigated by the Code Enforcement Officer, and if a violation is found, the officer will attempt to gain voluntary compliance. If not reached, then a series of three notices would be issued. If the notices go unheeded then administrative citations can be issued or the matter can be referred to the City Attorney's Office. However, the City makes every attempt to work with homeowners and businesses to gain voluntary compliance.

The most common types of cases are noise and property maintenance issues. During the COVID-19 pandemic, there were issues with rent increases or inability to pay rent. In these cases, staff referred the resident to a partnering social service provider such as FAM and South County Outreach, to the Fair Housing Foundation and/or to State programs for rental assistance.

ENVIRONMENTAL, INFRASTRUCTURE, AND PUBLIC SERVICE CONSTRAINTS

Environmental factors and a lack of necessary infrastructure or public services can constrain residential development in a community by increasing costs and reducing the amount of land suitable for housing construction.

Environmental Constraints

Environmental constraints related to wildland fire hazards, seismic activity, geology, or topography, potential for flooding, or other environmental issues can impact the cost associated with the maintenance, improvement, and development of housing. The Safety Element identifies areas within the City subject to seismic, geologic, wildfire, and flooding hazards which may constrain residential development, as well as policies and programs to mitigate these hazards.

High Fire Severity Zones: A portion of the west side of the City, located adjacent to the Aliso and Wood Canyons are in high fire hazard severity zones. This area is already built-out and no additional housing is anticipated in this area. In addition, OCFA conducts annual inspections within this area and has developed a system of collaboration with the homeowners and the homeowners associations to address any issues identified which are predominately related to trimming or removing landscaping.

Seismic and Geologic Constraints: Earthquake shaking is largely caused by the release of seismic energy during periods of sudden displacement along a fault. Aliso Viejo is located in a relatively active seismic region of the State and may be subject to moderate or severe ground shaking at any time. Although no known fault traverses Aliso Viejo that could subject it to ground-rupture, the Inglewood-Newport fault, located northeast of the City could trigger landslides and liquefaction. Measures identified in the Safety Element are required to mitigate hazards associated with natural seismic and geologic conditions and result in added development costs and constrain residential development. Nevertheless, these measures are necessary to protect public safety.

Flooding: The Safety Policy Map (Figure S-1 in the Safety Element) outlines portions of the community that fall within a 100-year flood zone. Most of this area is located in the Aliso and Wood Canyons Wilderness Park and has been designated as Open Space in the Land

Use Element. However, no land designated for residential uses is located within the floodplain.

Ecological and Biological Resources: Although much of Aliso Viejo is comprised of urbanized or disturbed areas that generally have low habitat value for wildlife, nearly 25 percent of the City's land area is set aside as open space, the majority of which is located within the Aliso and Wood Canyons Wilderness Park, a significant source of ecological and biological resources.

Extensive research and planning efforts conducted by the County of Orange and other jurisdictions prior to the City's incorporation have identified the locations of sensitive habitats and species. Aliso Viejo lies within the Coastal subregion of the Orange County Natural Community Conservation Plan and Habitat Conservation Plan (NCCP/HCP) area.

Several areas within Aliso and Wood Canyons Wilderness Park are designated as Non-Reserve Open Space within the NCCP/HCP, while a substantial area west of the City is designated as NCCP Habitat Reserve. Within the Habitat Reserve area, the NCCP/HCP restricts the kinds of permitted uses to protect long-term habitat values. Residential uses are prohibited, as are new active recreational uses outside already disturbed areas.

Infrastructure and Public Service Constraints

A lack of adequate infrastructure or public services and facilities to keep pace with the demands of new development can be a substantial constraint to residential development. This section looks at the City's domestic water, sewer, flood control, dry utilities and solid waste disposal systems to evaluate capacity to meet residential demands. SB 1087 of 2005 requires cities to provide a copy of their Housing Elements to local water and sewer providers, and also requires that these agencies provide priority hookups for developments with lower-income housing. The Housing Element will be provided to these agencies immediately upon adoption. The City is built out and the infrastructure, including those for all utilities and streets, is adequate to meet current and projected needs during the planning period. All utility and infrastructure providers have indicated the capacity to accommodate housing needs identified in this Housing Element.

Domestic Water: Potable water is imported by Metropolitan Water District of Southern California (MWD) and transferred to the Moulton Niguel and El Toro Water Districts, which serve Aliso Viejo. According to these Districts, existing piping and filtration infrastructure is adequate to serve future development within the City and the water supply is adequate at least until the year 2030. These districts are totally dependent on the MWD to meet water demands. According to the MWD's long-term water supply modeling, reliable supplies can be maintained until 2030 under conditions that have existed in prior dry periods.

The City will continue to work with the Moulton Niguel and El Toro Water Districts to implement the Urban Water Management Plans and ensure that adequate water supplies

are available to meet the needs of existing and future growth. The City will review proposed development projects to ensure that approved projects do not degrade water pressure or reduce supplies available to the rest of the community. Those projects found to be subject to California State Water Code 10910-10915 will be required to undergo review by the applicable water purveyor to ensure adequate water supplies will be available.

In addition, the City will encourage water conservation through various methods. The City will comply with AB 1881 regarding water conservation in landscaping irrigation. The City will coordinate with the Aliso Viejo Community Association (AVCA) to ensure that landscaping, park maintenance and other services provided by the Association employ water conservation measures and use recycled water if available from water suppliers. City officials will continue collaboration with Transportation Corridor Agency (TCA) to achieve attractive, well-maintained low-water landscaping within the Transportation Corridor. The City will continue to expand and implement a plant palette consisting of native and xeriscape plant species to serve as a model for private landscaping projects. In addition to conserving water, new landscaping within the City will be required to consist of 50 percent low water native or xeriscape plant species as required by the General Plan. These requirements will be re-evaluated periodically and the percentage of low water plants will be increased over time. These measures will mitigate the potential constraint on residential development resulting from future availability of adequate water supplies and infrastructure.

Sewer Facilities: The Moulton Niguel and El Toro Water Districts operate sewer collection and transmission facilities within Aliso Viejo. According to the Districts, these facilities are well-maintained and will be able to service future growth within the City. Collected wastewater is transmitted to the Regional Wastewater Treatment Plant operated by the South Orange County Wastewater Authority (SOCWA). New development will be required to cooperate with the Moulton Niguel Water District or the El Toro Water District to ensure that the existing wastewater infrastructure can adequately serve the project. The City will continue to cooperate with the South Orange County Wastewater Authority in efforts to provide adequate wastewater treatment services for Aliso Viejo. In addition, the City will continue to coordinate with the local water districts in their planning and maintenance of their wastewater collection facilities in the community to ensure adequate wastewater infrastructure for future residential development in Aliso Viejo.

Flood Control: The Orange County Flood Control District (OCFCD) is responsible for regional flood control facilities, while the City maintains local facilities that tie into OCFCD's regional system. Local drainage facilities consist mostly of underground closed conduits and storm drains located primarily in developed areas of the City. These facilities collect and convey storm water to regional facilities including the Laguna Canyon, Woods Canyon, and Aliso Creek Channels. The City will continue to coordinate with the OCFCD, which is responsible for maintenance and monitoring of regional flood control facilities.

Dry Utilities: Dry utilities such as electricity, telephone and cable are provided by private companies and are currently available in the areas where future residential development is planned. When new development is proposed the applicant coordinates with utility companies to arrange for the extension of service. There are no known service limitations that would restrict planned development during the planning period.

Solid Waste: Solid waste generated in Aliso Viejo is collected by a private contractor and transmitted to various landfills operated by the Orange County Integrated Waste Management Department (IWMD). Although Aliso Viejo is nearly built out, the Orange County population continues to grow and so does its waste. IWMD is responsible for ensuring that waste is disposed of in a way that protects public health, safety, and the environment. To accomplish this objective, IWMD developed a Regional Landfill Options for Orange County (RELOC) Strategic Plan. The City will continue to cooperate with IWMD in efforts to maintain and expand its regional landfill facilities. The adequacy of regional landfills to handle future flows of solid waste generated in Aliso Viejo will not constrain future residential development in the City.

C.4 EVALUATION OF THE PRIOR HOUSING ELEMENT

Section 65588(a) of the *Government Code* requires that jurisdictions evaluate the effectiveness of the previous Housing Element, the appropriateness of goals, objectives and policies, and the progress in implementing programs for the previous planning period. This appendix contains a review the housing goals, policies, and programs of the previous housing element and evaluates the degree to which these programs have been implemented during the previous planning period, 2013 through 2021. The findings from this evaluation have been instrumental in determining the City's 2021-2029 Housing Implementation Program.

Table CP-31 compares the City's quantified objectives for the 5th planning period to accomplishments.

~~Table CP-32~~Table CP-31
Progress in Achieving Quantified Objectives 2013-2021

Program Category	Quantified Objective	Progress
New Construction		
Extremely Low	-	-
Very Low	7	83
Low	34	335
Moderate	199	386
Above Moderate	-	35
Total	**240**	**839**
Conservation (Sec. 8)		
Very Low Low Moderate Above Moderate	56	56
Total	**56**	**56**

Table CP-32 summarizes the programs contained in the previous Housing Element along with the program objectives and accomplishments.

In addition to the specific program accomplishments described in this table, the City has attempted to make strides in meeting the needs of its special needs population. Goal H-3, Policy H-3.1 states that the City should "identify and participate in programs and provide incentives through density bonuses and rezoning to encourage residential projects that include housing for seniors, low- and moderate-income groups or special needs group." This was accomplished through the rezoning and construction of 2 and 4 Liberty in which

402 units were constructed, 398 of which were senior affordable units. The project was granted a density bonus with development standard concessions and 4 Liberty was provided affordable housing in-lieu fees.

Policy H-3.2 encourages the "provision of housing and services for special needs groups, such as the homeless, the disabled and victims of domestic violence by providing City grants to agencies providing services to persons in these groups." The City has partnered with South County Outreach and Family Assistance Ministries to provide these services. In addition, the City used affordable housing in-lieu fees and its own General Fund to purchase an affordable unit to house homeless individuals.

~~Table CP-33~~Table CP-32

2013-2021 Housing Element Program Evaluation

Program	Objectives	Timeframe	Progress
1. Adequate Sites for Affordable Housing	1) The City will process amendments to the General Plan and zoning designations for sites located at 4 Liberty and 2C Liberty to accommodate at least 249 lower income housing units in compliance with Government Code Sec. 65583.2.h and Sec. 65583.2.i. 2) Staff will provide assistance to applicants during the design review process. 3) The City will facilitate affordable multi-family development on these sites by supporting funding applications, allocating funds from the Affordable Housing In-Lieu Monies, and / or approving modifications to development standards. 4) The City will report annually to the California Department of Housing and Community Development on its progress in implementing this program. 5) The City will monitor project approvals and comply with the no net loss requirements of Government Code Sec. 65863. No zoning amendment or project approval shall reduce the residential density than assumed in Table CP-23 of the Housing Element Community Profile unless the City makes written findings in accordance with Sec. 65863 (b).	1) Within first year of the planning period (October 15, 2014) 2) Ongoing 3) Ongoing 4) By April 1 each year 5) Ongoing	1) On January 22 and February 5, 2014, the City processed amendments to the General Plan and zoning designations for sites located at 4 Liberty and 2C Liberty to accommodate at least 249 lower income housing units. 2) Staff provided assistance to the 2C Liberty site applicant during the design review process for the applicant's 2014 site development permit. Additionally, staff provided assistance to the 4 Liberty site applicant during the design review process for the applicant's 2015 site development permit. 3) On November 5, 2014, the City Council approved a 202-unit senior affordable project located at 2C Liberty. The approval included modifications/waivers to six (6) development standards. On October 7, 2015, the City Council approved a 200-unit senior affordable project located at 4 Liberty. The approval included modifications/waivers to six (6) development standards. 4) Following the March 17, 2021 public meeting, staff will submit this annual planning report to the California Department of Housing and Community Development. 5) The approval of the projects located at 2C Liberty for 202 units and 4 Liberty for 200 units exceeded the residential density at each site (144 units) assumed in Table CP-23 of the Housing Element Community Profile.
2. Affordable Housing In-Lieu Funds	1) The City will hire a qualified housing consultant to develop recommendations for the best use of the in-lieu funds, with the priority of extremely-low and very-low-income housing. 2) The City Council will make the funds available to qualified participants and could also be utilized to retain affordable status on units that may	1) Within first year of the planning period (October 15, 2014) 2) Within two years after the adoption of the Housing Element (January 22, 2016)	1) On October 1, 2014, the City hired a qualified housing consultant, RSG, to develop recommendations for the best use of the in-lieu funds. 2) On February 4, 2015 the City Council considered and approved RSG's recommendations, and the funds became available to qualified applicants.

Program	Objectives	Timeframe	Progress
	require City intervention and the associated administrative costs.		3) Per Resolution 2016-08 (approved February 17, 2016) the City provided Aliso Viejo 1776, LP., a $2,250,000 loan in lieu of providing 50 very-low income units at the 4 Liberty site. 4) Purchased the affordable unit at 35 Playa and placed a family of four that was facing homelessness.
3. Homeownership Assistance Programs	Provide homebuyer assistance information to potential homeowners in Aliso Viejo.	Ongoing	As homebuyer assistance information becomes available from the County of Orange or non-profit agencies, staff does and will continue to make available the information on the City's website and at the public counter. Additionally, when one of the 58 affordable, owner-occupied units become available, an interest list of potential buyers is provided to the seller. The City maintains a waiting list comprised of person(s) inquiring about the affordable housing units and the criteria for purchasing available units. The interested party is provided with a Pre-Application Checklist to review and determine if they may qualify should a unit become available. If the inquiring party decides that they appear to be qualified, they provide their name, contact phone number, and email address. This information is passed on to a seller should a property come up for sale. At that time, a full application is completed, and the buyer would move forward if approved. This list is maintained and updated as any information may change. On average there are 120 people on the waiting list at any given time and approximately two units per year become available.
4. Section 8 Housing Choice Vouchers	The City will continue to promote the use of Section 8 Housing Choice Vouchers in Aliso Viejo with the objective of expanding assistance to very-low income households. Specifically, the City will make referrals to OCHA, advertise the program on the City website and in newsletters, and distribute information at the public counter at City Hall.	Ongoing	The City has and will continue to make referrals to the Orange County Housing Authority regarding Section 8 Housing Choice Vouchers.
5. OCHA Special Needs Groups Rental Assistance Program	The City will continue to assist OCHA in promoting its Special Needs Groups Rental Assistance Programs in Aliso Viejo with the	Ongoing	The City has and will continue to make referrals to the Orange County Housing Authority regarding Special Needs Group Rental Assistance.

Program	Objectives	Timeframe	Progress
	objective of expanding assistance to additional households with special needs. Specifically, the City will make referrals to OCHA, advertise the program on the City website and in newsletters, and distribute information at the public counter at City Hall.		The City estimates that approximately one referral was made every month during the planning period. It is unknown if OCHA expanded the program based on these referrals. In the next planning period, the City should increase efforts to document referral and increase communication with OCHA to follow-up on referrals.
6. City Grants for Special Needs Groups	The City will allocate 50% of its Human and Social Services community assistance grant budget to incorporate homelessness prevention programs, programs for the disabled, and domestic violence support programs into the annual cycle of grant funding.	Ongoing	In FY 2017/18, 57% or $10,500 of the $18,500 Human and Social Services community assistance grant budget was approved for homeless prevention programs, programs for the disabled, and domestic violence support programs. In FY 2018/19, 53% or $16,000 of the $30,000 Human and Social Services community assistance grant budget was approved for homeless prevention programs, programs for the disabled, and domestic violence support programs. In FY 2019/20, 49% or $14,750 of the $30,000 Human and Social Services community assistance grant budget was approved for homeless prevention programs, programs for the disabled, and domestic violence support programs. In FY 2020/21, 80% or $14,750 of the $18,500 Human and Social Services community assistance grant budget was approved for homeless prevention programs, programs for the disabled, and domestic violence support programs. ~~66% or $12,250 of the $18,500 Human and Social Services community assistance grant budget was approved for homeless prevention programs, programs for the disabled, and domestic violence support programs in July 2020.~~
7. Code Enforcement	The City's Code Enforcement Staff will continue to enforce property maintenance standards and adopted City Building and Zoning Codes. The City will promote the importance of property maintenance to long-term housing quality and property values, and encourage community and neighborhood preservation through the Aliso Viejo Community Association (AVCA), City newsletters-news, cable television, and informational	Ongoing	The City's code enforcement staff has and will continue to aggressively enforce property maintenance standards, including the enforcement of health and safety provisions. The City maintain a 0.5 FTE code enforcement officer. To date, this has been sufficient, however, if the number of cases continues to increase, an additional 0.5 FTE may be required. To date, monies have not become available to assist with home rehabilitation. However, the City intends to make programs available during the new cycle with the use of CDBG funds

Program	Objectives	Timeframe	Progress
	brochures at the public counter at City Hall. As opportunities become available, the City will consider funneling resources into home rehabilitation.		
8. Conservation of Existing and Future Affordable Units	Annually, the City will monitor the status, notify residents of potential conversion, and pursue options to preserve the units.	Ongoing	Planning staff has and will continue to monitor the affordable units. In 2020, the City did not receive any notices for potential conversions.
9. Streamlined Residential Permit Processing	Minimize permit processing time to reduce development costs for affordable housing.	Ongoing	Planning staff worked diligently with the applicant for 2C Liberty to minimize permit processing time for its affordable housing 202-unit project. The application was submitted in May 2014 and approved in November 2014, a total of six months. Additionally, Planning staff worked diligently with the applicant for 100 Freedom Lane (4 Liberty) to minimize permit processing time for its affordable housing 200-unit project. The application was submitted in May 2015 and approved in October 2015, a total of five months. In 2018, staff continued to assist the 100 Freedom Lane development through the construction process. In 2019, the City was also awarded $160,000 in first year SB 2 grant funds to secure a Enterprise Land Management software system which will reduce processing times.
10. Fair Housing Services	The City will continue to contract to support fair housing services for City residents. The City will advertise fair housing services on its website and at the public counter at City Hall, library, and other community locations.	Ongoing	As of July 1, 2020, the City initiated a contract with the Fair Housing Foundation to provide fair housing services. From January 1, 2020 - June 30, 2020, the City contracted with the Fair Housing Council of Orange County (FHCOC) via the entitlement status administrative partnership with the County of Orange.
11. Encourage Energy Conservation	Amend zoning regulations to encourage energy conservation.	2014	As of September 2014 (approved July 16, 2014) a zoning code amendment creating AVMC 15.68 Green Building Program became effective to encourage energy conservation. The amendment included the implementation of a fee reduction for energy conserving permits and a solar education program.

C.5 SITES INVENTORY

Overview

State law requires cities to identify adequate sites with appropriate zoning to accommodate the assigned regional housing need for the planning period. This section includes an evaluation of the capacity for additional residential development during the 2021-2029 planning period.

Assumptions

State law establishes a "default density" of 30 units per acre that is generally considered suitable for lower-income housing. The site inventory analysis is based on this general affordability assumption. While the inventory must assign potential units on each site to income categories, those allocations are not a mandate or prediction of the actual income levels of future units. The purpose of assigning potential units to income categories is to determine whether adequate sites are available to accommodate the City's RHNA allocation based on the default density criteria in State law.

Existing Sites Inventory

Nearly all of the properties designated for residential use in Aliso Viejo have been developed. Table CP-33 lists sites in the city with land use designations that allow additional residential development based on current zoning designations. Only one site – the Towers Planning Area in The Commons Specific Plan – remains undeveloped. No project-specific development has been approved for this property. The zoning allows stand-alone residential development.

Accessory dwelling units (ADUs) represent an additional opportunity for affordable housing, particularly for single persons or small households including the elderly, college students, young adults, and caregivers. Recent changes in State law have made the construction of ADUs more feasible for homeowners, and the City has seen an increase in ADU development applications recently. During calendar years 2018-2020 the City has approved 2 ADU permits. At that rate, it is estimated that approximately 5 additional ADUs will be permitted during the 2021-2029 planning period. Based on recent analysis conducted by SCAG approximately two-thirds of future ADUs are expected to be affordable to lower-income households.

Candidate Sites for Rezoning

Table CP-33 shows that there are currently insufficient residential sites to accommodate the City's RHNA allocation. To accommodate this shortfall, the Housing Plan includes Program 1, *Adequate Sites for New Housing* to amend General Plan and zoning designations for sufficient sites to be selected from the sites listed in Table CP-34 to

accommodate the RHNA allocation. Maps showing these candidate sites are provided in Figure CP-xx.

Nearly all of the candidate sites listed in Table CP-26 are currently developed, although several of the parcels only contain surface parking lots. All of the candidate sites are at least 2 acres and less than 10 acres in size, although a few of the parcels in Site 3 are less than one-half acre. There are no significant vacant sites in the city that are suitable for residential use.

The selection of candidate sites considered a variety of factors, including:

- A substantial amount of surface parking or low-value uses such as storage
- Ratio of assessed improvements-to-land value (I/L ratio) less than 1.0
- Good access to opportunity, including transportation, commercial services, schools and employment
- Parcels of substantial size
- Property owner interest

Recent real estate development trends in coastal Orange and Los Angeles counties demonstrate the increasing market feasibility of multi-family and mixed-use redevelopment at densities of 30 units/acre or more (Figure B-1). In addition, research conducted by the University of California, Berkeley[6] to identify potential infill development opportunities in California concluded that the ratio of improvement value to land value (I/L ratio) serves as an indicator of the likelihood of redevelopment. That study utilized an I/L ratio of less than 1.0 for commercial and multi-family residential properties, and the authors of that study noted that this methodology "…has a strong theoretical and empirical basis: urban parcels for which improvement values are less than land values are widely considered to be economically underutilized. Indeed, many, if not most, market-rate infill housing projects are currently built on refill sites." The candidate sites listed in Table CP-3434 were also reviewed by the City Council at public hearings, and property owners and other interested stakeholders had the opportunity to provide comments on sites that should be considered for additional residential development.

Infrastructure Availability

Infrastructure such as water, wastewater, drainage systems and dry utilities are in place, and there are no known limitations that would preclude the anticipated level of development. As part of future Land Use Element amendments and zoning changes to

[6] University of California, Berkeley Institute of Urban and Regional Development, The Future of Infill Housing in California: Opportunities, Potential, Feasibility and Demand, 2005

ensure availability of adequate sites (Program 1a) CEQA analysis will be conducted to confirm infrastructure availability.

~~Table CP-34~~Table CP-33
Residential Land Inventory

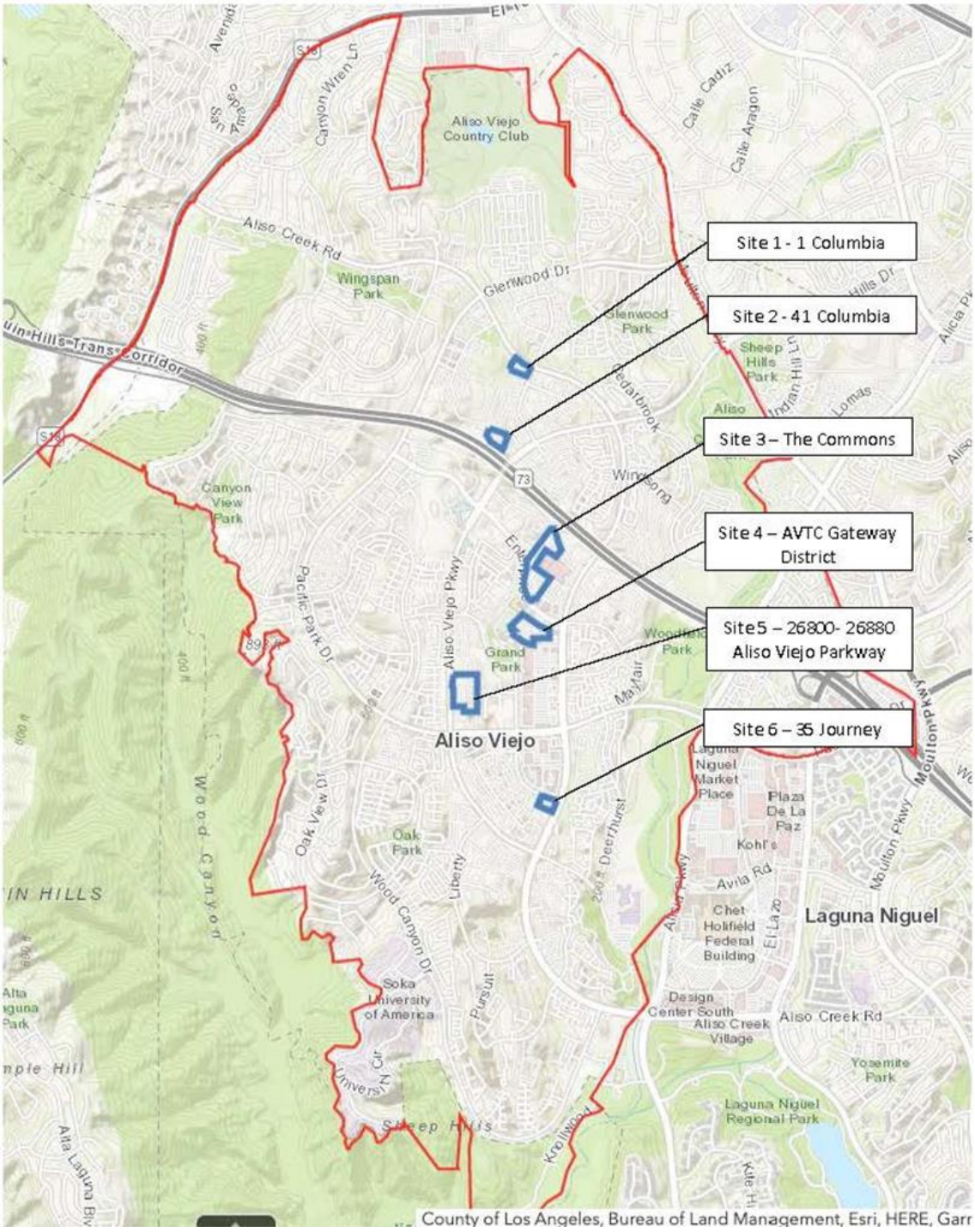
Site	General Plan	Zoning	Acreage	Density	Units by Income Category				Total Units
					VL	Low	Mod	Above Mod	
The Commons at Aliso Viejo Town Center – Towers Planning Area	CBO – The Commons at AV Town Center	SP No. 2 - Commons	4.1	34.1 units/acre	7*	14	119	0	140
Potential ADUs					1~~10~~	2~~17~~	2~~12~~	0~~1~~	5~~40~~
Totals			**4.1**		**8~~17~~**	**16~~31~~**	**121~~131~~**	**0~~1~~**	**145~~180~~**
Housing Need 2021-2029					**390**	**214**	**205**	**386**	**1,195**
Adequate Sites? (Shortfall)					**(382~~343~~)**	**(198~~183~~)**	**(84~~74~~)**	**(386~~385~~)**	**(1,050~~1,015~~)**

Notes:
* Deed-restricted units

~~Table CP-35~~Table CP-34
Candidate Parcels for Rezoning

Site	Site Address/Intersection	APN	General Plan (Current)	Zoning (Current)	Parcel Size (Acres)	Existing Use	I/L Ratio	Proposed GP	Proposed Zoning	Min Density (units/acre)	Max Density (units/acre)	Lower	Mod	Above Mod	Total
1	1 Columbia	623-141-01	BP	BP-2	2.0	Offices	0.45	MU	MU	20	30	36	6	18	60
2	41 Columbia	623-141-09	BP	BP-2	2.0	Offices	0.48	MU	MU	20	30	36	6	18	60
3	The Commons	629-101-16	HDR/TCC	SP-2	2.0	Parking	0.12	MU	MU	20	50	60	10	30	100
3	The Commons	629-101-17	OS	OS	4.0	Vacant	0.19	MU	MU	20	50	120	20	60	200
3	The Commons	629-101-18	HDR/TCC	SP-2	3.9	Parking	0.00	MU	MU	20	50	117	19	61	197
Subtotal: Site 3					9.9		0.12					297	49	151	497
4	Enterprise & Aliso Creek Rd	629-321-44	TCC	CT	1.0	Parking	0.70	MU	MU	20	30	18	3	9	30
4	Enterprise & Aliso Creek Rd	629-321-42	TCC	CT	0.4	Parking	0.19	MU	MU	20	30	7	1	4	12
4	Enterprise & Aliso Creek Rd	629-321-43	TCC	CT	0.7	Parking	0.00	MU	MU	20	30	12	2	6	20
4	Enterprise & Aliso Creek Rd	629-321-48	TCC	CT	1.4	Parking	0.53	MU	MU	20	30	24	4	13	41
4	Enterprise & Aliso Creek Rd	629-321-20	TCC	CT	0.2	Parking	0.19	MU	MU	20	30	2	0	3	5
4	Enterprise & Aliso Creek Rd	629-321-41	TCC	CT	1.0	Parking	2.43	MU	MU	20	30	18	3	9	30
4	Enterprise & Aliso Creek Rd	629-321-17	TCC	CT	0.5	Parking	0.00	MU	MU	20	30	8	1	5	14
4	Enterprise & Aliso Creek Rd	629-321-45	TCC	CT	0.7	Parking	0.18	MU	MU	20	30	12	2	7	21
4	Enterprise & Aliso Creek Rd	629-321-01	TCC	CT	0.3	Parking	0.38	MU	MU	20	30	4	0	4	8
4	Enterprise & Aliso Creek Rd	629-321-02	TCC	CT	0.7	Parking	0.49	MU	MU	20	30	12	2	6	20
4	Enterprise & Aliso Creek Rd	629-321-03	TCC	CT	0.3	Parking	0.16	MU	MU	20	30	5	0	4	9
Subtotal: Site 4					7.0		0.59					122	18	70	210
5	26800 Aliso Viejo Parkway	629-451-07	PO	PO	2.0	Offices	0.46	MU	MU	20	30	36	6	18	60
5	26840 Aliso Viejo Parkway	629-451-08	PO	PO	2.0	Offices	0.44	MU	MU	20	30	36	6	18	60
5	26880 Aliso Viejo Parkway	629-451-09	PO	PO	3.0	Offices	0.30	MU	MU	20	30	54	9	27	90
Subtotal: Site 5					7.0		0.38					126	21	63	210
6	35 Journey	632-134-07	BP	BP-1	2.0	Offices	0.49	MU	MU	20	30	36	6	18	60
TOTALS					29.9							653	106	338	1,097

Figure xx
Candidate Sites for Rezoning



ALISO VIEJO
Live Life Inspired

Site Inventory – Potential Sites

1 Columbia

Site Size: 2 acres

Info: Office building at the Corner of Columbia and Aliso Creek Road

Zoning: BP-2



1

ALISO VIEJO
Live Life Inspired

Site Inventory – Potential Sites

41 Columbia

Site Size: 2 acres

Info: Office building formerly occupied by Benny Hinn Ministries and Love World.

Zoning: BP-2



2

ALISO VIEJO
Live Life Inspired

Site Inventory – Potential Sites

35 Journey

Site Size: 2 acres

Info: Office building located at corner of Journey and Aliso Creek Rd.

Zoning: BP-1



3

ALISO VIEJO
Live Life Inspired

Site Inventory – Potential Sites

26800-26880

Aliso Viejo Parkway

Site Size: 7 acres

Info: Mid-block office buildings located

Between Glaukos campus and Pacific Park Dr.

Zoning: BP-1



4

ALISO VIEJO
Live Life Inspired

Site Inventory – Potential Sites

The Commons

Site Size: 9.9 acres

Info: Potential to add mixed-use component to parking lot area adjacent to building previously occupied by Lowe's

Zoning: SP-2



5

ALISO VIEJO
Live Life Inspired

Site Inventory – Potential Sites

AVTC Gateway District

Site Size: 7.2 acres

Info: Mixed-use potential. Community Design Process anticipated 300 housing units.

Zoning: CT



6

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C.6 PUBLIC PARTICIPATION SUMMARY

Public participation is an important component of the Housing Element update process. Government Code §65583(c)(8) states that "The local government shall make diligent effort to achieve public participation of all the economic segments of the community in the development of the housing element, and the program shall describe this effort." Public participation played an important role in the formulation and refinement of the City's housing goals and policies.

City residents and many other interested parties were encouraged to participate in the Housing Element update process and to identify housing issues of concern, recommend strategies, review the draft element, and provide recommendations to decision-makers.



A Housing Element web page was established to provide interested persons with information including Frequently Asked Questions, meeting announcements, reference materials, and also included an online survey regarding housing needs in the community. Persons and organizations representing the interests of lower-income households and persons with special needs, as well as affordable housing developers, were specifically targeted in the City's notification list (see below).

The following public meetings were conducted for the 2021-2029 Housing Element update:

May 19, 2021 City Council study session
August 18, 2021 City Council public meeting
January 12, 2022 Public workshop
January 19, 2022 City Council public hearing

Notices of all public meetings were posted on the City's website, and also mailed to all persons and organizations on the Housing Element interest list in advance of each meeting. The draft Housing Element was also was posted on the Housing Element website and made available for review at City Hall, and notices were also mailed to the interest list when the draft Housing Element was published. In addition to participation in public meetings, interested parties were invited to submit written comments via email or mail.

During public meetings and in the online survey, the most frequent comments centered around the insufficient amount of housing affordable to local residents and employees, and the importance of maintaining the quality and character of existing residential

neighborhoods. While many of the causes and potential solutions to these issues are beyond the control of cities, the Housing Plan includes programs designed to address each of these issues.

Housing Element Notification List

Kennedy Commission
17701 Cowan Ave., Suite 200
Irvine, CA 92614

League of Women Voters
PO Box 1065
Huntington Beach, CA 92647

OC Association of Realtors
25552 La Paz Road
Laguna Hills, CA 92653

Public Law Center
601 Civic Center Drive West
Santa Ana, 92701

Habitat for Humanity of Orange County
2200 S. Ritchey St.
Santa Ana, CA 92705

Jamboree Housing Corp.
17701 Cowan Avenue
Suite 200
Irvine, CA 92614

The Related Companies of California
18201 Von Karman Ave Ste 900
Irvine, CA 92612

Community Housing Resources, Inc.
17701 Cowan Avenue, Suite 200
Irvine, CA 92614

South County Outreach
26776 Vista Terrace
Lake Forest, CA 92630

Dayle McIntosh Center
South County Branch
24012 Calle De La Plata # 110
Laguna Hills, CA 92653

OC Housing Providers
25241 Paseo de Alicia, Suite 120
Laguna Hills, CA 92653

Brittany Irvin
Province Group
26 Corporate Plaza #260
Newport Beach, CA 92660

OC Business Council
2 Park Plaza, Suite 100
Irvine, CA 92614

OC Housing Trust
198 W. Lincoln Ave., 2nd Floor
Anaheim, CA 92805

Neighborhood Housing Services of Orange County
198 W. Lincoln Ave., 2nd Floor
Anaheim, CA 92805

BIA/OC
17744 Sky Park Circle #170
Irvine, CA 92614

City of Laguna Woods
Attn: Community Development Director
24264 El Toro Road
Laguna Woods, CA 92637

City of Laguna Hills
Attn: Community Development Director
24035 El Toro Rd
Laguna Hills, CA 92653

City of Mission Viejo
Attn: Community Development Director
200, Civic Center
Mission Viejo, CA 92691

Community Outreach Coordinator
Regional Center of Orange County
P.O. Box 22010
Santa Ana, CA 92702-2010

City of Laguna Niguel
Attn: Community Development Director
30111 Crown Valley Pkwy
Laguna Niguel, CA 92677

City of Laguna Beach
Attn: Community Development Director
505 Forest Ave.
Laguna Beach, CA 92651-2394

Dan Schmid
Welcoming Neighbors Home
23676 Birtcher Dr.
Lake Forest, CA 92630

Moulton Niguel Water District
P.O. Box 30203
Laguna Niguel, CA 92607

South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, CA 92629

El Toro Water District
24521 Los Alisos Boulevard
Lake Forest, CA 92630

Brandon Young
Mitchell M. Tsai, Attorney At Law
155 South El Molino Ave, Ste. 104
Pasadena, CA 91101

City of Aliso Viejo
2021 Housing Element FAQ

1. What is a Housing Element?

State law[1] requires each city to adopt a comprehensive, long-term General Plan for its physical development. Aliso Viejo's General Plan[2] is divided into the following six "elements" or chapters that contain goals, policies and programs which are intended to guide land use and development decisions:

- Land Use
- Housing
- Circulation
- Conservation/Open Space
- Safety
- Noise

The purpose of the Housing Element is to evaluate the housing needs of Aliso Viejo's current and future residents and set forth policies and programs to address those needs.

While most portions of General Plans typically have a time horizon of 20-25 years, State law requires that the Housing Element be updated in 8-year "cycles." The City is currently preparing a Housing Element update for the 2021 to 2029 planning period, which is referred to as the "6th Housing Element cycle" in reference to the six required updates that have occurred since the comprehensive revision to State Housing Element law in 1980.

State law[3] establishes detailed requirements for Housing Elements, which are summarized in California Government Code Section 65583:

> *The housing element shall consist of an identification and analysis of existing and projected housing needs and a statement of goals, policies, quantified objectives, financial resources, and scheduled programs for the preservation, improvement, and development of housing. The housing element shall identify adequate sites for housing, including rental housing, factory-built housing, mobile homes, and emergency shelters, and shall make adequate provision for the existing and projected needs of all economic segments of the community.*

[1] California Government Code Sec. 65300 *et seq.*
[2] https://avcity.org/300/General-Plan
[3] California Government Code Sec. 65580 *et seq.*

Aliso Viejo 2021 Housing Element FAQ

2. What is Housing Element "certification" and why is it important?

The State Legislature has delegated to the California Department of Housing and Community Development ("HCD") the authority to review Housing Elements and issue findings regarding the elements' compliance with the law.[4] When HCD issues a letter finding that the Housing Element is in substantial compliance with State law it is referred to as "certification" of the Housing Element.

Housing Element certification is important for two main reasons:

- **Local control.** The General Plan and its various elements provide the foundation for the City's land use plans and development regulations, and the Housing Element is part of the General Plan. If the City were challenged in court on a planning or zoning matter and the General Plan were found by the court to be invalid, the court could order changes to City land use plans or regulations and assume control over City land use decisions. HCD certification establishes a "rebuttable presumption of validity"[5] that the Housing Element complies with State law, which would support the City's legal defense. Recent laws also allow courts to impose fines on a jurisdiction if it fails to adopt a Housing Element in compliance with State law.[6]
- **Eligibility for grant funds.** Some State grant funds are contingent upon Housing Element certification. Grants can help to cover the cost of some projects that would otherwise rely on the City's General Fund.

Aliso Viejo's last Housing Element update was completed in 2014 and was certified by HCD as fully compliant with State law.

3. What are the most important issues that must be addressed in the Housing Element update?

The major issues that must be addressed in the Housing Element update are: 1) how City policies, plans and regulations help to meet the region's housing needs for persons and families of all income levels; and 2) how City land use regulations accommodate the special housing needs of those with disabilities or other difficulties.

- **Accommodating Regional Housing Needs**. Under State law[7] all cities are required to plan for additional housing to accommodate population growth and address existing housing problems such as overcrowding and high housing cost. State law recognizes that cities generally do not build housing, since that is typically the role of private and non-profit developers and builders. However, cities are required to adopt policies, development regulations and standards to encourage a variety of housing types that are affordable for persons of all income levels. The Regional Housing Needs Assessment ("RHNA") is the method by which each jurisdiction's share of new housing needs is determined (see #5 below).

[4] California Government Code Sec. 65585
[5] California Government Code Sec. 65589.3.
[6] AB 101 of 2019
[7] California Government Code Sec. 65583

Aliso Viejo 2021 Housing Element FAQ

- **Housing for Persons with Special Needs**. Under State law[8] cities must also ensure that their plans and regulations encourage the provision of housing for persons with special needs including:

  - ✓ Reasonable accommodation for persons with disabilities
  - ✓ Transitional housing
  - ✓ Supportive housing
  - ✓ Emergency shelters and other facilities serving the homeless
  - ✓ Large (5+) families

4. What is "affordable" housing?

By definition, housing is considered "affordable" when total housing cost, including utilities, is no more than 30% of a family's gross income. State law describes five income categories, which are based on county median income as shown in Table 1.

Table 1. Household Income Categories

Income Category	% of county median income
Extremely low	Up to 30%
Very low	31-50%
Low	51-80%
Moderate	81-120%
Above moderate	Over 120%

Source: California Government Code Sec. 65584(f)

Affordable housing costs for all jurisdictions in Orange County are determined based on these income categories as shown in Table 2. These incomes, rents and housing prices are based on a 4-person family and are adjusted for different family sizes.

Table 2. Income Categories and Affordable Housing Costs – Orange County

Income Category	Maximum Income	Affordable Rent	Affordable Price (est.)
Extremely Low	$40,350	$1,009	(1)
Very Low	$67,250	$1,681	(1)
Low	$107,550	$2,689	(1)
Moderate	$128,050	$3,201	$500,000
Above moderate	Over $128,050	Over $3,201	Over $500,000

Assumptions:
-Based on a family of 4 and 2021 State income limits
-30% of gross income for rent or principal, interest, taxes & insurance
-5% down payment, 4% interest, 1.25% taxes & insurance, $350 HOA dues
Notes:
(1) For-sale affordable housing is typically at the moderate income level
Source: Cal. HCD; JHD Planning LLC

5. What is the "RHNA" why is it important?

Each California city is required to plan for new housing to accommodate a share of regional needs. The Regional Housing Needs Assessment ("RHNA") is the process established in State law[9] by which housing needs are determined.

[8] California Government Code Sec. 65583(a)(5)
[9] California Government Code Sec. 65584 et seq.

Aliso Viejo 2021 Housing Element FAQ

Prior to each planning cycle the total new housing need for each region of California is determined by HCD based upon economic and demographic trends, existing housing problems such as overcrowding and overpayment, and additional housing needed to ensure reasonable vacancy rates and replace units lost due to demolition or natural disasters.

Aliso Viejo is located within the Southern California Association of Governments ("SCAG") region, which includes Los Angeles, Orange, Riverside, San Bernardino, Imperial and Ventura counties. The total housing need for the SCAG region is distributed to cities and counties by SCAG based upon objectives and criteria established in State law.[10]

In 2019 HCD determined that the total new housing need for the entire SCAG region in the 6th Housing Element cycle is 1,341,827 units. In March 2021 SCAG adopted the RHNA plan for the 6th cycle, which fully allocates the RHNA to jurisdictions in the SCAG region.[11] Table 3 shows the RHNA allocations for Aliso Viejo, Orange County, and the entire SCAG region.

Table 3. 6th Cycle RHNA – Aliso Viejo, Orange County and SCAG Region

	Aliso Viejo	Orange County	SCAG Region
Housing need allocation 2021-2029	1,195	183,861	1,341,827

Source: SCAG, 3/4/2021

The RHNA also distributes each jurisdiction's total housing need into four income categories (the extremely-low and very-low categories are combined for RHNA purposes). Aliso Viejo's 6th cycle RHNA allocation by income category is shown in Table 4.

Table 4. 6th RHNA by Income Category – Aliso Viejo

Extremely Low + Very Low	Low	Moderate	Above Moderate	Total
390	214	205	386	1,195

Source: SCAG, 3/4/2021

6. Is the RHNA a construction mandate?

The RHNA allocation identifies the projected amount of additional housing a jurisdiction would need in order to have enough housing at all price levels to fully accommodate its assigned share projected growth over the 8-year planning period while also eliminating existing problems of overcrowding and overpayment. The RHNA is a *planning requirement* based upon housing need, *not a construction quota or mandate.* Jurisdictions are not required to build housing or issue permits to achieve their RHNA allocations, but some provisions of State law establish specific requirements when housing production falls short of RHNA allocations. One such requirement is streamlined review and approval of housing development applications that meet specific standards.[12] Other than requirements for streamlined permit processing, there are

[10] California Government Code Sec. 65584(d)
[11] http://www.scag.ca.gov/programs/pages/housing.aspx
[12] California Government Code Sec. 65913.4 (SB 35 of 2017)

Aliso Viejo 2021 Housing Element FAQ

currently no legal or financial penalties imposed on cities for failing to achieve their RHNA allocations.

7. What must cities do to comply with the RHNA?

The Housing Element must provide an evaluation of the city's capacity for additional housing based on land use patterns, development regulations, other development constraints (such as infrastructure availability and environmental conditions) and real estate market trends. The analysis must be prepared at a parcel-specific level of detail and identify properties (or "sites") where additional housing could be built consistent with City regulations. This evaluation is referred to as the "sites analysis" and State law requires the analysis to demonstrate that the city has adequate capacity to fully accommodate its RHNA allocation in each income category. If the sites analysis does not demonstrate that adequate capacity exists to fully accommodate the RHNA, the Housing Element must describe what steps will be taken to increase capacity commensurate with the RHNA – typically through amendments to land use and zoning regulations that could facilitate additional housing development. Such amendments typically include increasing the allowable residential density or allowing housing to be built in areas that are currently restricted to only non-residential land uses.

8. Why are cities in high-cost areas expected to have affordable housing? Low-cost housing is not economically feasible here due to high land prices.

State housing laws are based on the premise that every city has an obligation to adopt regulations to accommodate a range of housing types for persons at all income levels. Every community is dependent on a variety of low- and moderate-income workers in jobs such as landscaping, building maintenance, child and elder care, medical technicians, personal services, clerical support and retail trade. While the existing housing stock serves the needs of many residents, market rents and prices are higher than some families can afford. In addition, low-wage jobs have increased at a much faster rate than affordable housing is being built.

While cities are not required to build new housing, they must ensure that their land use regulations encourage a full range of housing types. Rental apartments typically provide the majority of affordable housing, but other types of housing such as accessory dwelling units (ADUs) can also help to address this need. Various governmental programs provide funding assistance for affordable housing, but if a city's development regulations do not allow sufficient additional housing, the housing needs of the local workforce may be shifted to other cities.

Aliso Viejo 2021 Housing Element FAQ

9. Aliso Viejo is fully developed. Why is the RHNA allocation so high?

SCAG's 6th cycle RHNA allocation for the entire 6-county region is 1,341,827 units compared to 412,137 units in the 5th cycle. There are two main reasons why the 6th RHNA allocation is so much higher than the 5th cycle.

First, the 5th cycle RHNA allocation was established in 2012 while the severe economic effects of the "Great Recession" were discouraging growth. As a result, the 5th RHNA was uncharacteristically low. For comparison, SCAG's 4th cycle (2006-2013) RHNA allocation was approximately 700,000 housing units.

Second, for the 6th cycle the State made a major modification to the process for determining RHNA allocations. In prior RHNA cycles, total housing need was based only on *projected population growth*. However, for the 6th RHNA cycle the State added *existing need* to the total RHNA calculation. Existing need includes households that are currently overcrowded (defined as more than one person per room) or are overpaying for housing (defined as more than 30% of gross income). The total 6th cycle RHNA allocation for the SCAG region is comprised of the sum of existing need and projected need, as follows:

Existing need:	577,422 units
Projected need:	764,405 units
Total need:	1,341,827 units

As seen from this breakdown, if existing need were excluded (as was the case in prior RHNA cycles) the total need would be similar to the 4th cycle RHNA.

With regard to jurisdictional RHNA allocations, the methodology adopted by SCAG for the 6th cycle places greater emphasis on the proximity of housing to jobs and public transit rather than availability of vacant developable land. As a result, the urbanized areas of Los Angeles and Orange counties have been assigned much higher housing need as compared to prior cycles even though they generally have much less vacant land than inland areas.

The RHNA allocations assume that in many urbanized cities of Orange and Los Angeles counties, a significant portion of new housing needs will be met through the redevelopment of older commercial properties.

10. How will Aliso Viejo accommodate its new housing needs assigned in the RHNA?

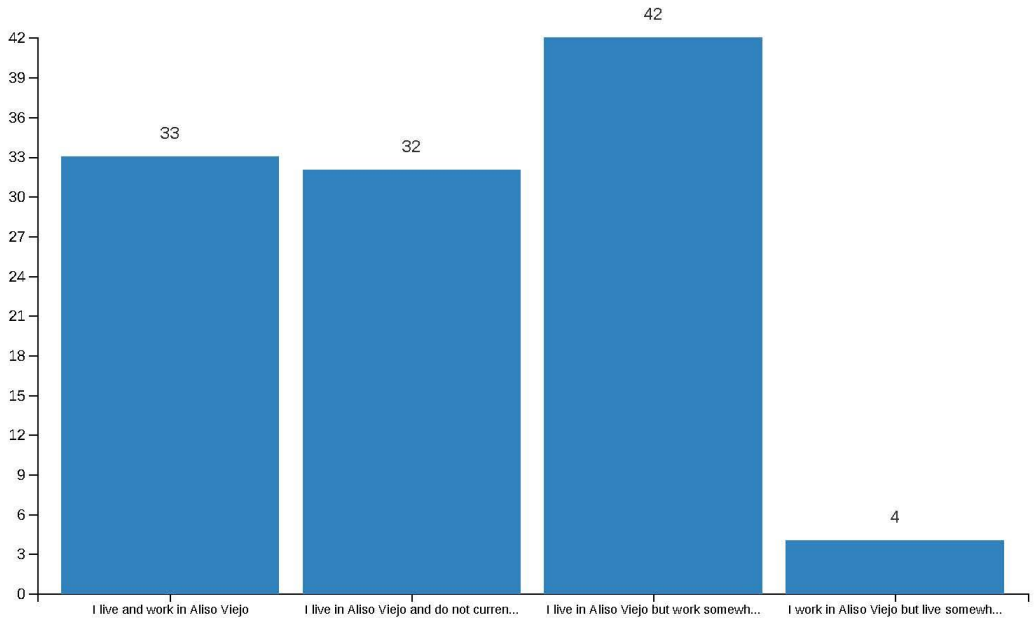
Aliso Viejo is fully developed and very little vacant land suitable for new housing is available. Therefore, the City's RHNA allocation must be satisfied through redevelopment of properties that have potential for housing or mixed use (i.e., a combination of housing and commercial uses on the same property). The City is currently studying development options for the Aliso Viejo Town Center that could include additional housing to satisfy RHNA obligations. The Housing Element update will identify a specific strategy for creating additional opportunities for housing.

. . .

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Question 1: 1. Do you currently live and/or work in Aliso Viejo?

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All



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Question 2: 2. If you live in Aliso Viejo, what were the main reasons you chose to live here?

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

Field value	Number of responses
Attractive neighborhoods	56 (50.5%)
Between work and beach	1 (0.9%)
City services, facilities and programs	8 (7.2%)
Close to family and/or friends	21 (18.9%)
Close to my workplace	26 (23.4%)
Does not apply	4 (3.6%)
Family friendly	1 (0.9%)
Good housing value	38 (34.2%)
Have lived here 30 years.	1 (0.9%)
Housing quality	42 (37.8%)
Laguna Beach School District	1 (0.9%)
Local recreational amenities	34 (30.6%)
Moved from Chicago for job	1 (0.9%)
Moved here in 1995, before lots of infrastructure.	1 (0.9%)
N/A	1 (0.9%)
Neighborhood safety	72 (64.9%)
New Build 25+ years ago	1 (0.9%)
Planned City with wide streets, attractive landscaping and limit on housing.	1 (0.9%)
Proximity to shopping and services	33 (29.7%)
Quality of local schools	42 (37.8%)
small amount of residents	1 (0.9%)
soka university	1 (0.9%)
there was nothing here when we moved here	1 (0.9%)
Upper Class Area, but starting to degrade with Section 8 - May turn into another LA	1 (0.9%)
We've owned and loved this home and our neighbors for 26 years.	1 (0.9%)
weather, proximity to the beach, and property values maintaining their worth/increasing.	1 (0.9%)

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Question 3: 3. What do you consider to be the most pressing housing problems in Aliso Viejo?

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

Field value	Number of responses
Affordability	51 (45.9%)
Affordable apartments with small fenced yards with green spaces (non-tiled) for planting or large dogs.	1 (0.9%)
burglary	1 (0.9%)
Fair housing/discrimination	3 (2.7%)
Financial assistance with home repairs for property owners with limited incomes	15 (13.5%)
If you can't afford to live here, move elsewhere. Wake up Aliso Viejo Mayor and City Counsel	1 (0.9%)
I'm not aware of any significant housing problems in Aliso Viejo	39 (35.1%)
Lack of guest houses for multigenerational families	1 (0.9%)
Lack of housing for larger families	12 (10.8%)
Lack of housing for smaller families	11 (9.9%)
Lack of retail shopping and restaurants	1 (0.9%)
More housing is needed close to schools, shopping, public transit and other services	6 (5.4%)
More housing options with supportive services are needed for people with disabilities	7 (6.3%)
More temporary housing is needed for homeless persons	6 (5.4%)
Need for multi-generational homes with casitas/apts	1 (0.9%)
No Single level homes	1 (0.9%)
None great to live here	1 (0.9%)
Piping/plumbing due to harsh water	1 (0.9%)
Senior affordable housing	1 (0.9%)
there is too much housing	1 (0.9%)
too many apartments	2 (1.8%)
Too many dense apartments housing/ traffic	1 (0.9%)
Too many homes, stop building!	1 (0.9%)
Too many new dwellings (IE Vantis) with less and less restaurants, shopping and entertainment options. We're losing way too many restaurants (Cosmos, Bagels&Brew, Native Foods, Panini Cafe, Active, etc etc etc) which isn't ideal for the AV experience.	1 (0.9%)
Too many people moving here!!! Too many apartments, crime, etc.	1 (0.9%)
Unregulated Airbnb's. I share a wall with one. It has been a nightmare.	1 (0.9%)
We need more EV free or low cost for AV residential only	1 (0.9%)

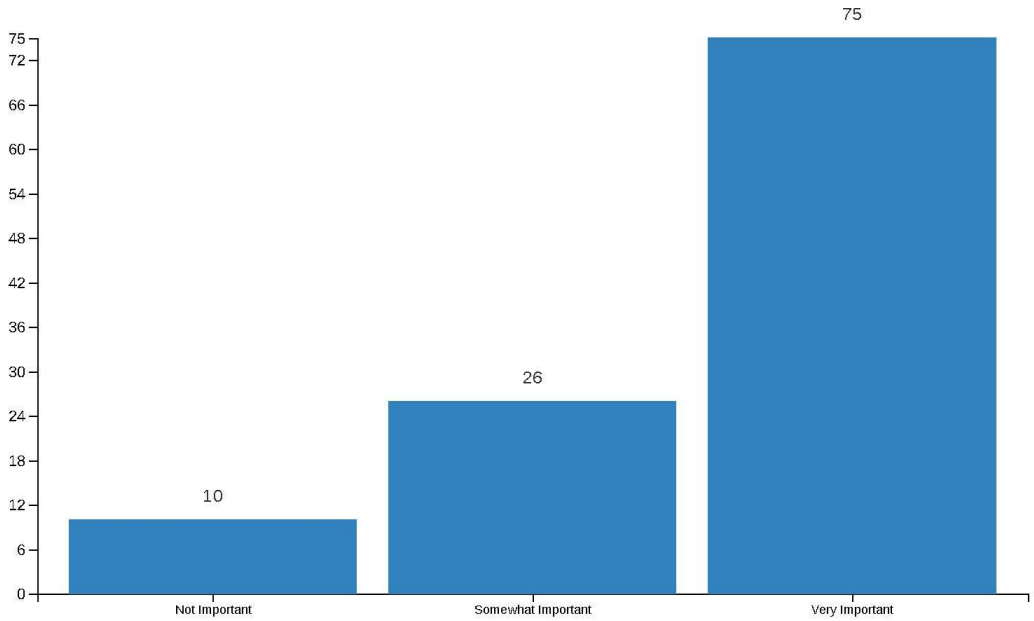
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Question 4: Maintaining the character of existing residential neighborhoods

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

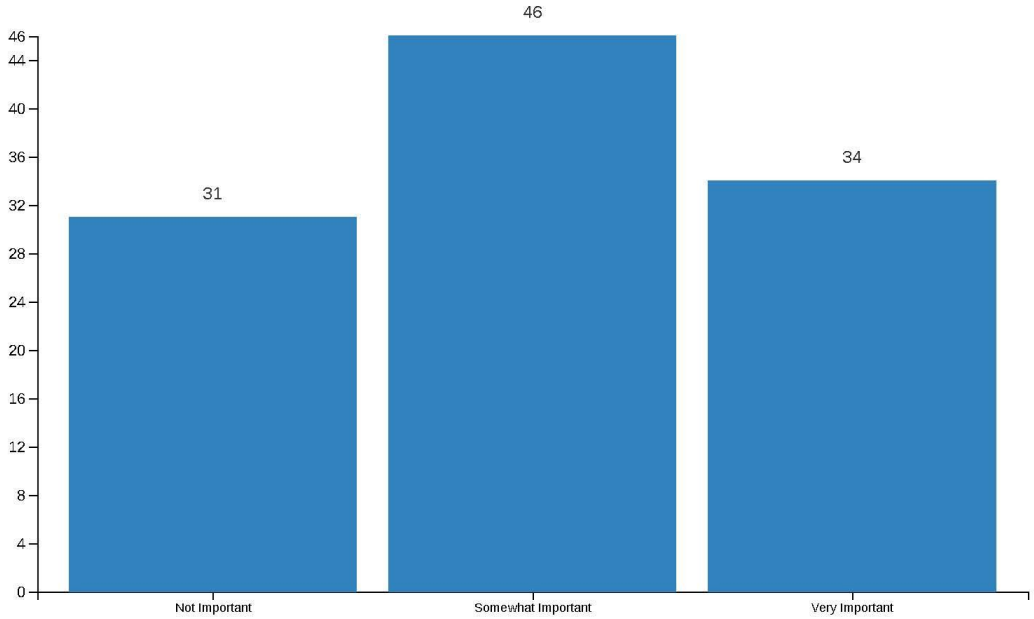


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Question 5: Ensuring that children who grow up in Aliso Viejo can afford to live in Aliso Viejo

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

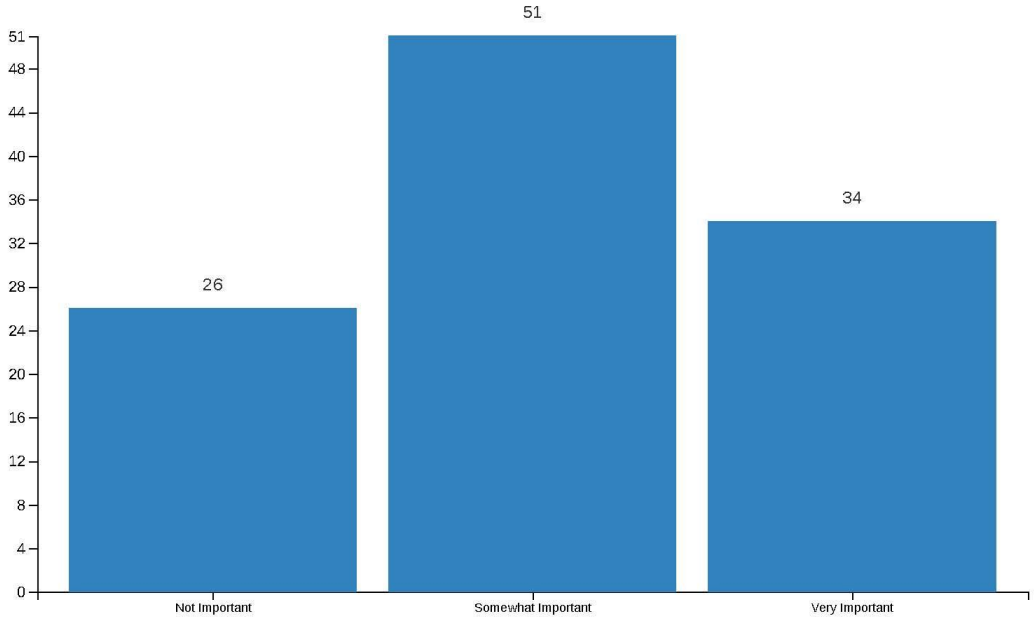


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Question 6: Ensuring that a diverse range of housing types (e.g. single-family, townhomes, apartments) are provided to meet t…

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

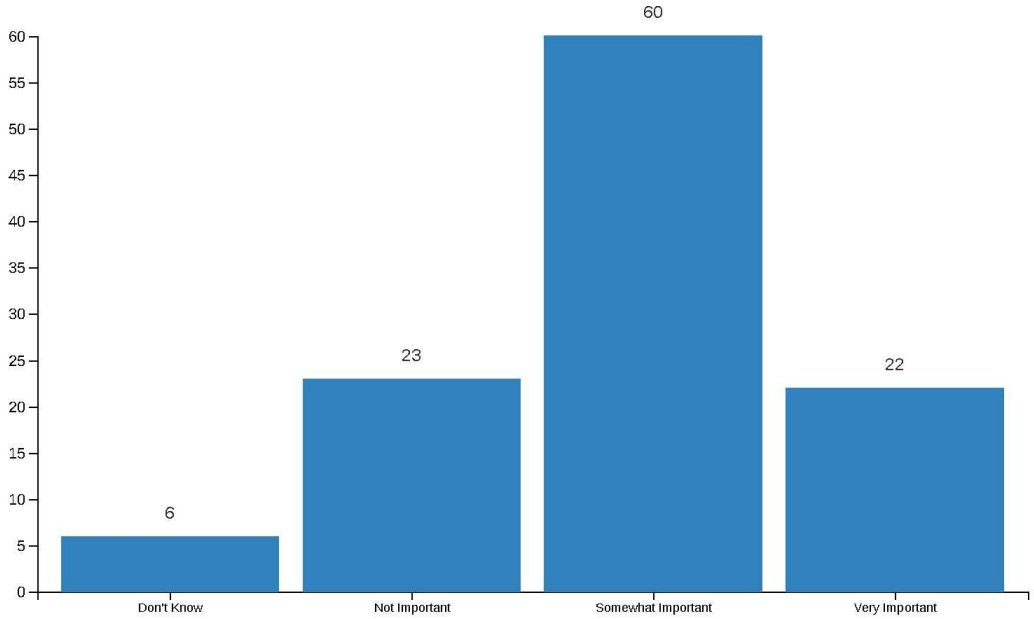


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Question 7: Establishing special needs housing for seniors, large families, veterans and/or persons with disabilities

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

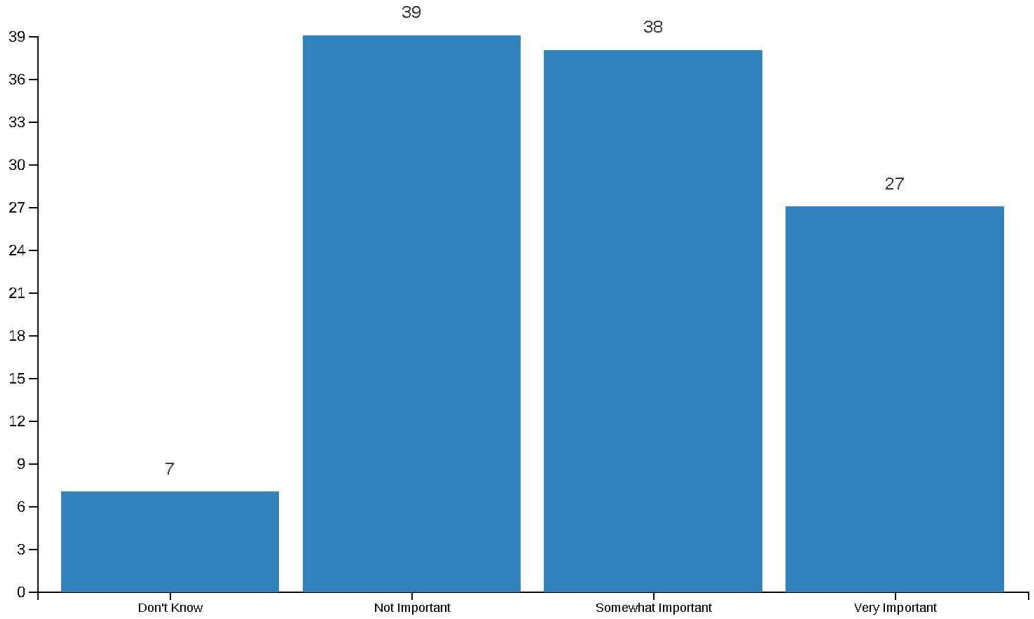


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Question 8: Integrating affordable housing throughout the community

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

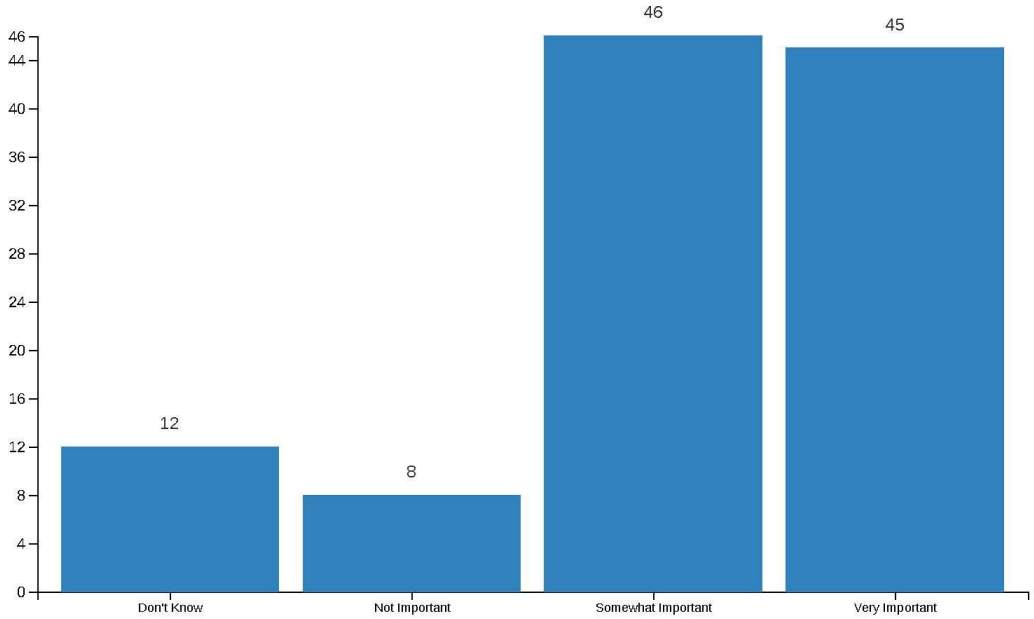


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Question 9: Encouraging the rehabilitation of existing housing stock

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

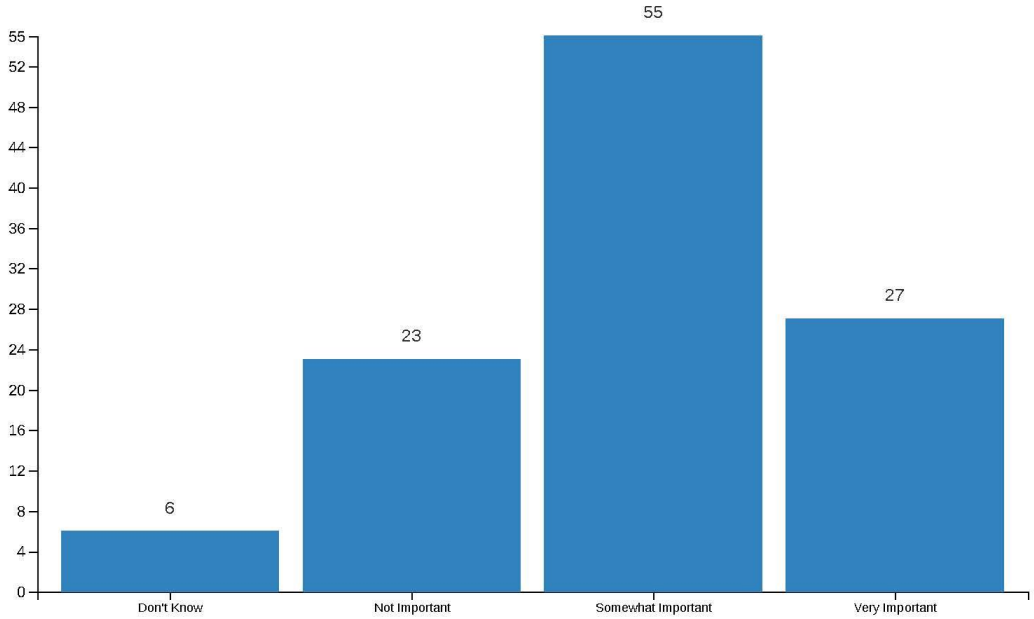


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Question 10: Establishing programs to help at-risk homeowners keep their homes

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

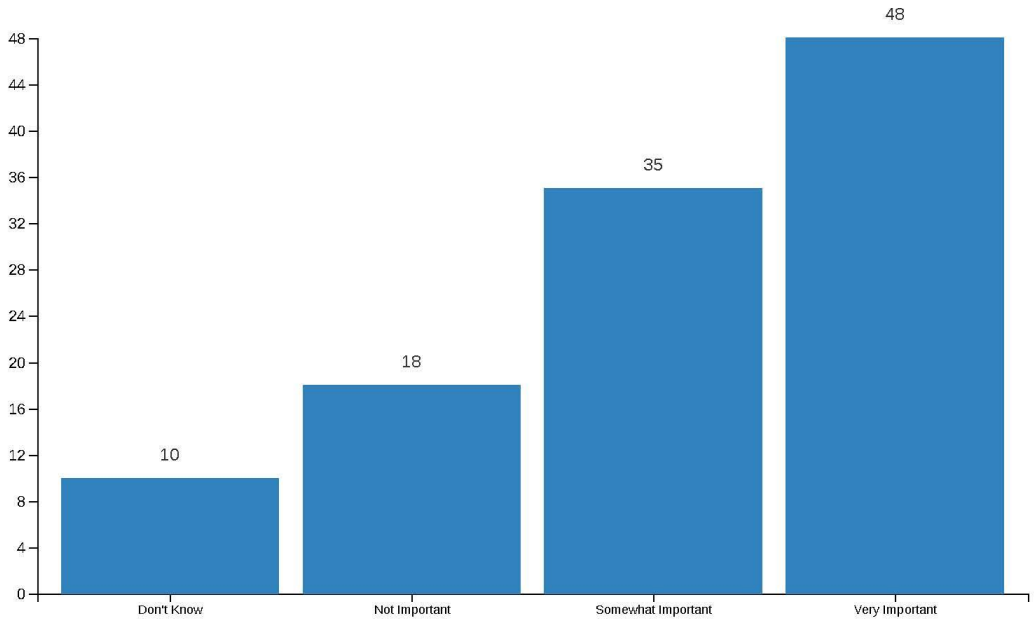


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Question 11: Fair and equitable housing opportunities and programs to help maintain and secure neighborhoods

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All

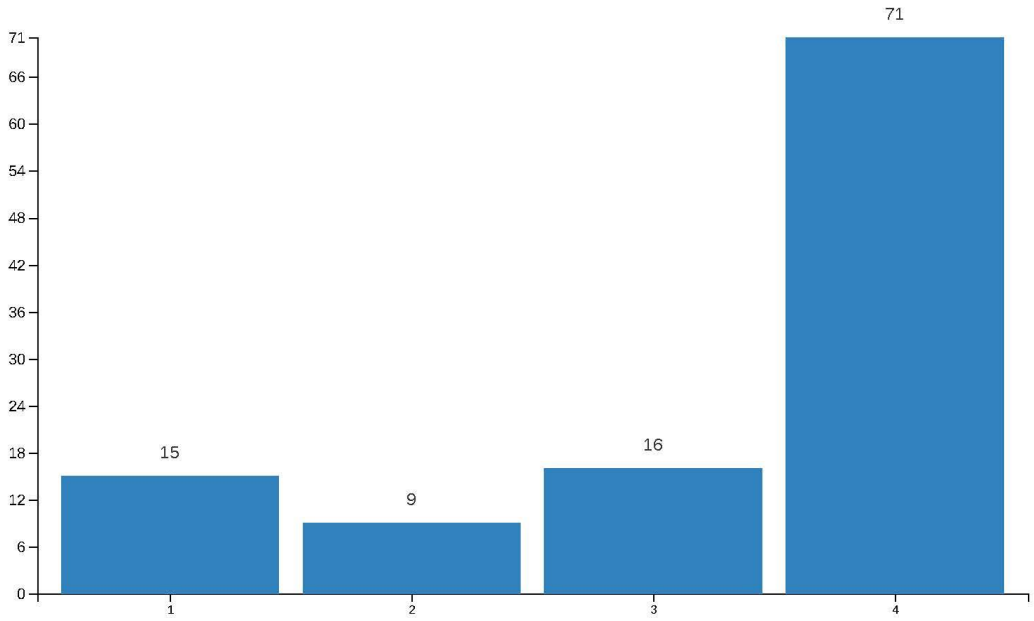


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Question 12: Allow more density in single-family zones

Answered 111 **Skipped** 0 **Date range** Year to date **Submitted by** All



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C.7 FAIR HOUSING ASSESSMENT

INTRODUCTION AND OVERVIEW OF AB 686

In January 2017, Assembly Bill 686 (AB 686) introduced an obligation to affirmatively further fair housing (AFFH) into California state law. AB 686 defined "affirmatively further fair housing" to mean "taking meaningful actions, in addition to combat discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity" for persons of color, persons with disabilities, and other protected classes. The Bill added an assessment of fair housing to the Housing Element which includes the following components: a summary of fair housing issues and assessment of the City's fair housing enforcement and outreach capacity; an analysis of segregation patterns and disparities in access to opportunities, an assessment of contributing factors, and an identification of fair housing goals and actions.

ASSESSMENT OF FAIR HOUSING ISSUES

Fair Housing Enforcement and Outreach

The City of Aliso Viejo is served by the Fair Housing Foundation (FHF). The FHF is contracted to investigate and resolve discrimination complaints, conduct discrimination auditing and testing, and education and outreach, including the dissemination of fair housing information such as written material, workshops, and seminars. FHF also provides landlord/tenant counseling, which is another fair housing service that involves informing landlords and tenants of their rights and responsibilities under fair housing law and other consumer protection regulations, as well as mediating disputes between tenants and landlords. While the nearest FHF office is in the City of Orange, the majority of cases are handled over the phone, and to ensure ease for local residents workshops are held in City facilities.

Between 2018 and 2021, FHF served 132 residents of Aliso Viejo and assisted with 16 fair housing complaints by Aliso Viejo residents. From the allegations FHF opened 5 cases accounting for about 2 percent of the cases opened by FHF in the Orange County. Of the 5 cases, 2 cited disability as a basis for discrimination. Source of Income was the second most common basis for discrimination. The U.S. Department of Housing and Urban Development (HUD) maintains a record of all housing discrimination complaints filed in local jurisdictions. These grievances can be filed on the basis of race, color, national origin, sex, disability, religion, familial status and retaliation. From July 1, 2018 to June 30,2021, 6 fair housing complaints in Orange County were filed with HUD. There were none filed with HUD for Aliso Viejo residents. FHF was able to successfully conciliate 2 cases, 2 cases they could not obtain evidence of discrimination, and 1 case was resolved with providing

Fair Housing training to management. In Orange County and the City of Aliso Viejo, Denial of Access was the most commonly reported - comprising 31 percent of all cases in the county and 40 percent of Aliso Viejo cases.

The 2020 Orange County Analysis of Impediments to Fair Housing Choice ("AI") found that the following may be contributing factors to fair housing for the County of Orange as a whole. The AI did identify issues with particular cities for each of these items, and Aliso Viejo was not specifically identified:

Access to transportation for persons with disabilities. The main barrier being a general lack of public transportation infrastructure.

- Access to finance services for residents.
- Access to public supported housing for persons with disabilities, although persons with disabilities are able to access housing through the Housing Choice Voucher program.
- Admissions and occupancy policies and procedures, including preferences in publicly supported housing. In particular, housing authorities, including the Orange County Housing Authority, provide live-work preferences to applicants for Housing Choice Vouchers.
- The availability of affordable units in a range of sizes. Overcrowding, as defined by HUD, in Orange County is very high, at 9.51% overall, expanding to 15.97% for renters.
- The availability, type, frequency, and reliability of public transportation. Public transportation in Orange County primarily consists of bus service operated by the Orange County Transportation Authority (OCTA) and Metrolink light rail service.
- Community opposition in general was identified. Aliso Viejo has not experienced community opposition in the two senior projects totaling 198 affordable units and for the units in the Glenwood and Vantis neighborhoods.
- Displacement of residents due to economic pressures in parts of Orange County that have historically had concentrations of low-income Hispanic and Vietnamese residents. Aliso Viejo is not considered one of these areas.
- Impediments to mobility, specifically Housing Choice Voucher payment standards that make it difficult to secure housing in many disproportionately White parts of the county, contribute to segregation and disparities in access to opportunity.
- Lack of access to opportunity due to high housing costs in particular, as the Disparities in Access to Opportunity section of this Analysis reveals, coastal areas and far eastern portions of the county have greater access to educational,

economic, and environmental opportunity than do most areas in between. Aliso Viejo is not considered a coastal community.

- Lack of affordable in-home or community-based supportive services due to the absence of any waiting list for Home and Community-Based Services for persons with developmental disabilities. This issue primarily affects people with psychiatric disabilities.
- Lack of affordable, integrated housing for individuals who need supportive services. This is a significant contributing factor for two reasons. First, the shortage of permanent supportive housing throughout Orange County in comparison to the total need is characteristic of the broader shortage of affordable housing generally. Second, although there are some programs that specifically focus on providing permanent supportive housing to individuals with disabilities, including developments built with Mental Health Services Act funds and Mainstream Housing Choice Vouchers, there has not been a concerted effort to raise local bond funds for affordable housing and prioritize permanent supportive housing with a portion of bond proceeds as there has been in some other California jurisdictions.
- Lack of local or regional cooperation. Although the prerequisites for collaboration across jurisdictions exists, there remains a problem with local governments not taking the steps to achieve regionally determined goals like progress toward meeting each jurisdictions Regional Housing Needs Allocation for very low- income and low-income households.
- Lack of local public fair housing outreach. There are no local public entities that conduct fair housing outreach and enforcement, with the California Department of Fair Employment and Housing and HUD constituting the only public enforcement bodies that operate in Orange County.
- Lack of resources for fair housing agencies and organizations. Three are two large fair housing organizations operating in Orange County that provide services to residents and engage in enforcement, outreach, and education. However, the size of the federal Fair Housing Initiatives Program, the primary funding program for fair housing organizations, has failed to keep up with inflation, making Congress's appropriations worth less over time. In order to meet the needs of residents of a large and diverse county, local fair housing agencies and organizations require greater levels of resourcing.
- Land use and zoning laws. With some exceptions, communities in Orange County that have relatively high concentrations of White residents and relatively low concentrations of Hispanic residents tend to have zoning that allows for limited opportunities to develop multifamily housing.

INTEGRATION AND SEGREGATION

Race and Ethnicity

The ethnic and racial composition of a region is useful in analyzing housing demand and any related fair housing concerns as it tends to demonstrate a relationship with other characteristics such as household size, locational preferences, and mobility. To assist in this analysis of integration and segregation, the Department of Housing and Community Development (HCD) has provided AFFH Data and Mapping Resources, which are included below. Also included is data from the 2020 Orange County Analysis of Impediments to Fair Housing Choice prepared by Lawyers' Committee for Civil Rights Under Law.

According to the California Fair Housing Task Force's 2021 opportunity maps, there is a small area in the northern portion of the City that is more than 81% racially segregated. This is a portion of the City that was developed under the County's jurisdiction prior to City incorporation in 2001.

Table CP-35 and Table CP-36 below reflect the Dissimilarity Indices for Aliso Viejo and the County as a whole. The Dissimilarity Index measures the percentage of a certain group's population that would have to move to a different Census tract to be evenly distributed within a city or metropolitan area in relation to another group. The higher the Dissimilarity Index, the higher the extent of segregation. The City of Aliso Viejo has relativity lower rates of dissimilarity than the County as a whole. The exception being the Black/White population, which is approximately 4% higher.

Table CP-35
Dissimilarity Index (0-100)

Value	Level of Segregation
0-40	Low Segregation
41-54	Moderate Segregation
55-100	High Segregation

Table CP-36
Dissimilarity Index Values by Race and Ethnicity, Orange County vs. Aliso Viejo

Racial/Ethnic Dissimilarity Index	1990 Trend		2000 Trend		2010 Trend		Current	
	Orange County	Aliso Viejo	Orange County	Aliso Viejo	Orange County	Aliso Viejo	Orange County	Aliso Viejo
Non-White/White	30.38	N/A	34.71	N/A	33.58	N/A	44.71	13.3
Black/White	32.60	N/A	33.63	12.6	32.27	12.3	46.98	50.89
Hispanic/White	36.13	N/A	41.08	11.6	38.18	20.4	52.82	22.57
Asian or Pacific Islander/White	32.58	N/A	34.31	6.1	34.82	8.1	43.19	14.98

The Isolation Index (Table CP-37 and Table CP-38) measure what percentage of the Census tract in which a person of a certain racial identity lives includes other persons of that same racial/ethnic group. A higher index number represents a larger clustering of a given population. In Aliso Viejo, the White/White population shows a slightly greater clustering

than for Orange County as a whole. Other racial groups experience much lower levels of clustering in general and when compared to the County as a whole.

Table CP-37
Isolation Index Values by Race and Ethnicity, Orange County

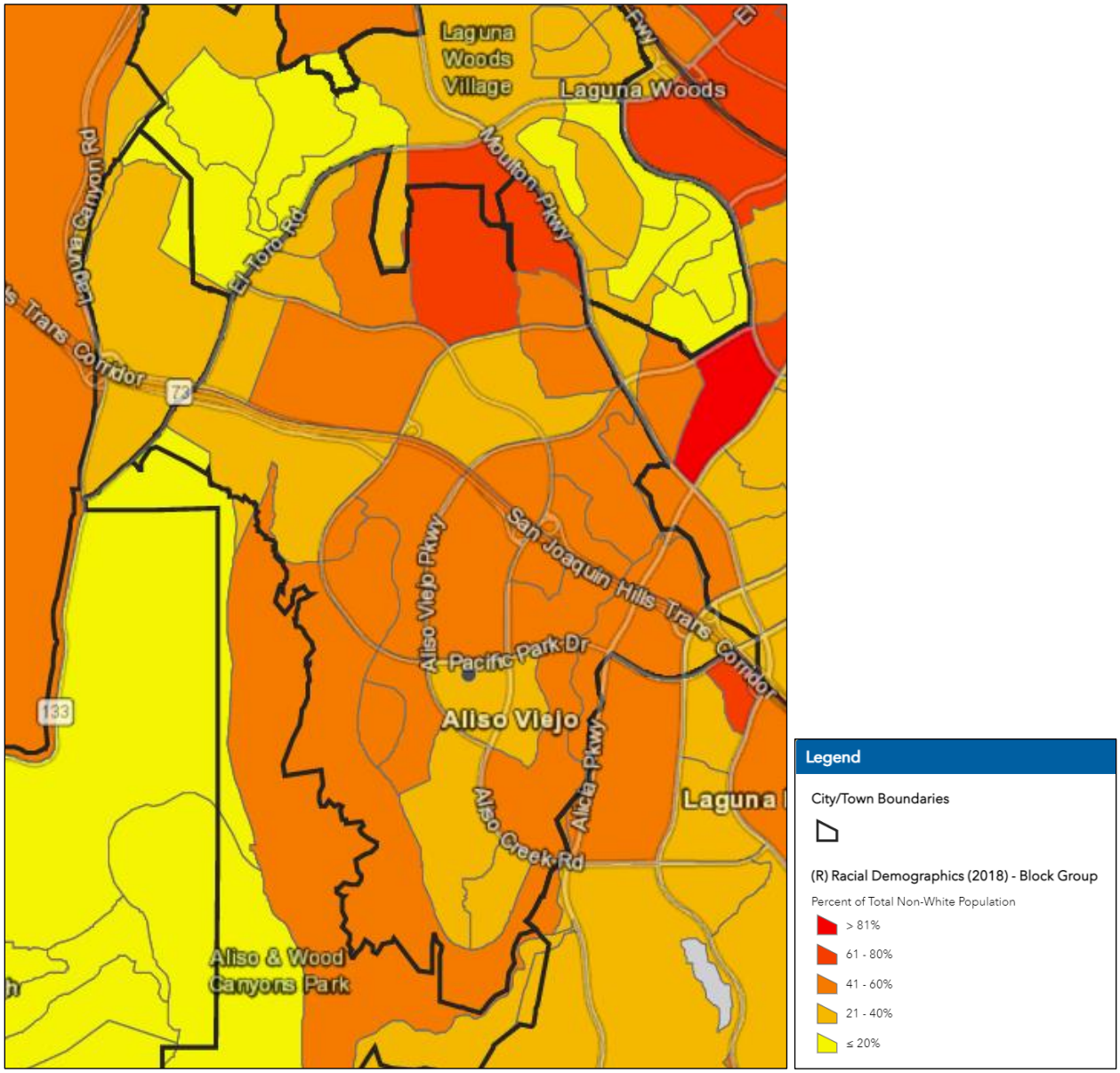
Isolation Index	Current
White/White	55.16
Black/Black	3.32
Hispanic/Hispanic	52.81
Asian/Asian	31.84

Table CP-38
Isolation Index Trends, Aliso Viejo

Isolation Index	1980 Trend	1990 Trend	2000 Trend	2010 Trend	Current
White/White	N/A	N/A	71.3	62.6	62.94
Black/Black	N/A	N/A	2.7	2.7	3.97
Hispanic/Hispanic	N/A	N/A	12.5	21.7	19.52
Asian/Asian	N/A	N/A	13.5	18.5	16.32

Areas of minority concentration by block group in Aliso Viejo are shown in Figure CP-2. The percentage of non-white population ranges from 21 percent to 80 percent and is highest in the northern portion of the city, which is also the area with the oldest housing stock.

~~Figure CP-5~~Figure CP-2
Areas of Minority Concentration in Aliso Viejo (2018)

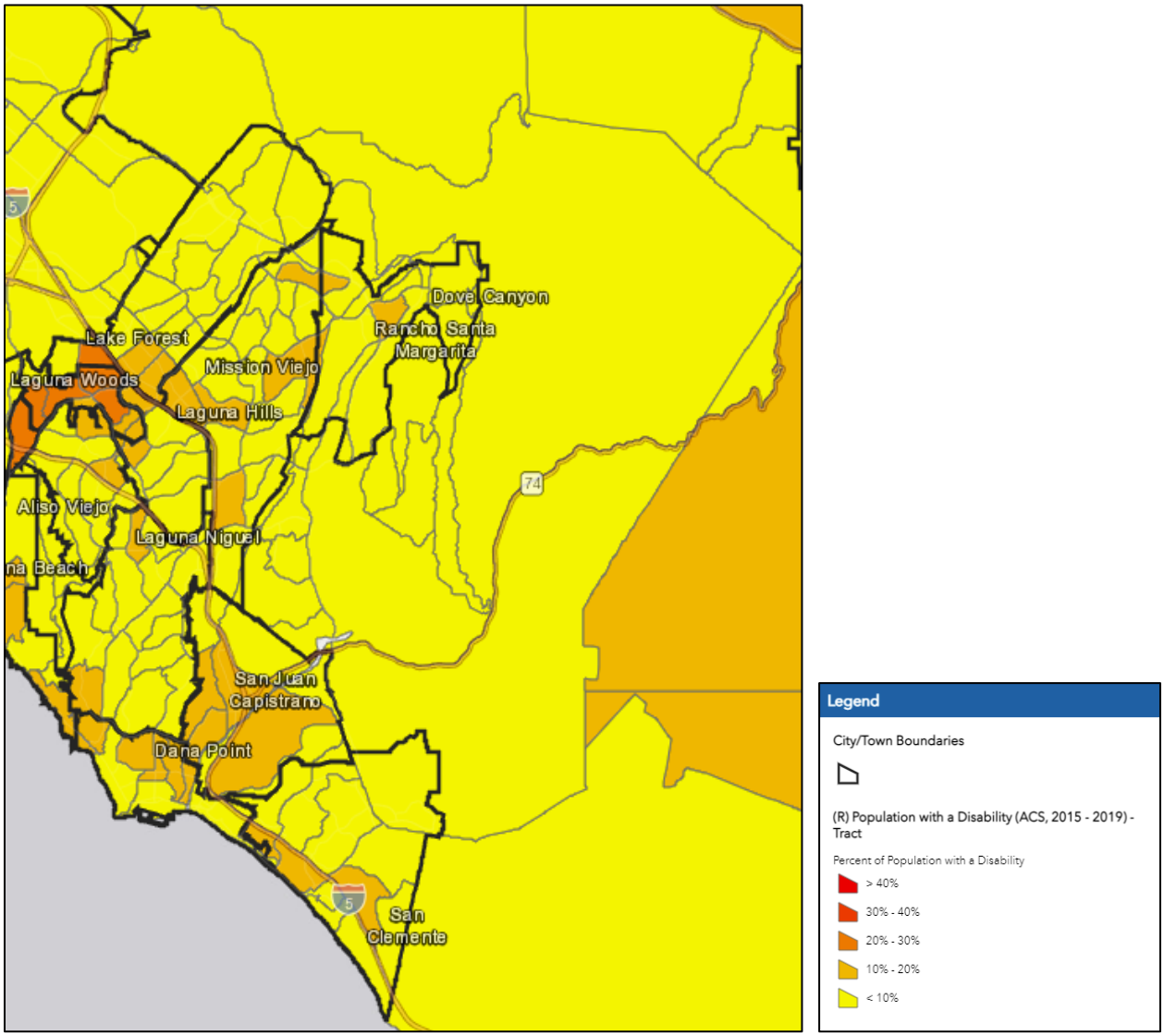


Persons with Disabilities

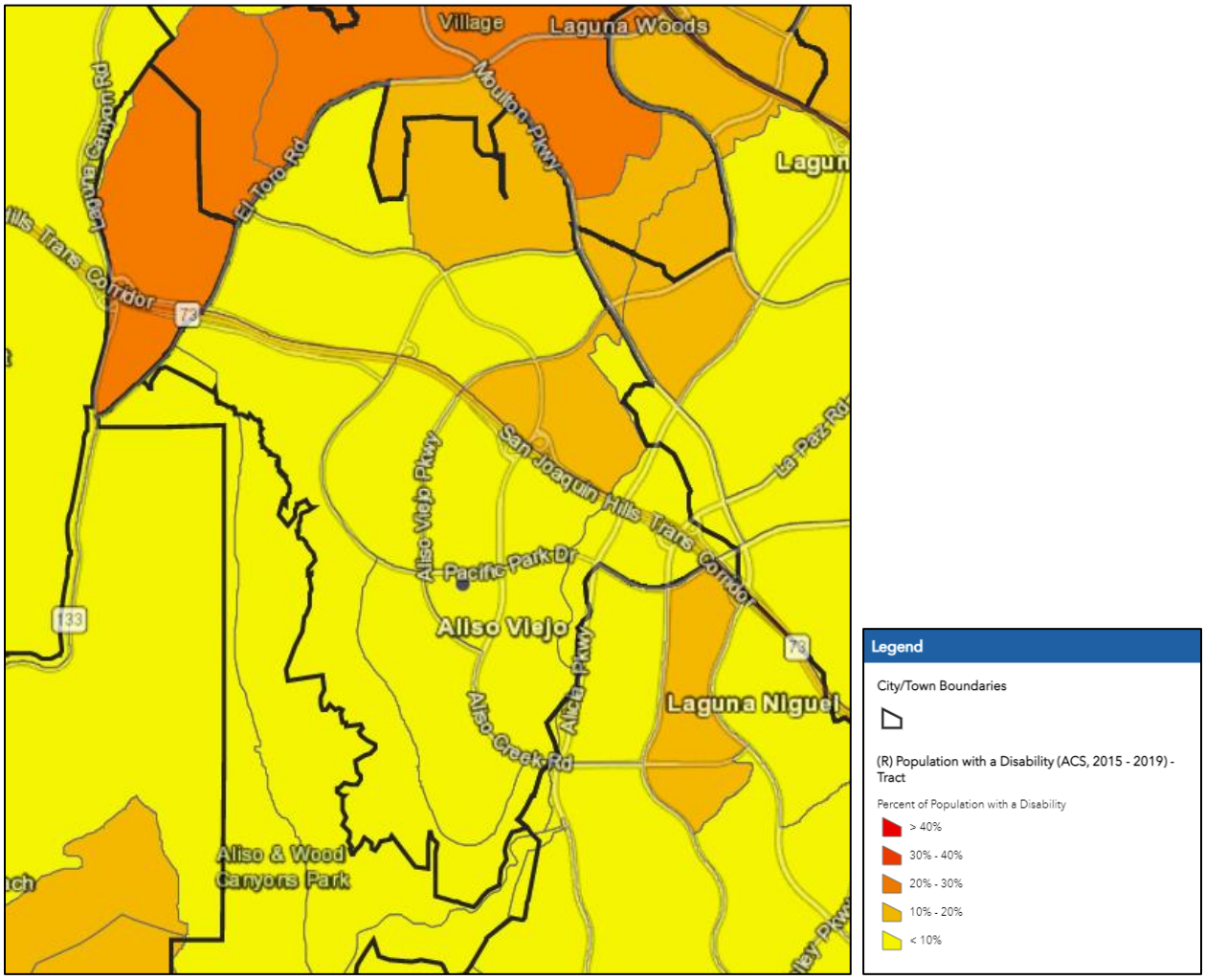
Figure CP-3 and Figure CP-4 show the percentage of persons with disabilities in the South Orange County region and in Aliso Viejo. The incidence of disabilities in Aliso Viejo is similar to the surrounding areas with the exception of Laguna Woods, which is atypical because of the very high percentage of seniors in Leisure World.

~~Figure CP-6~~Figure CP-3

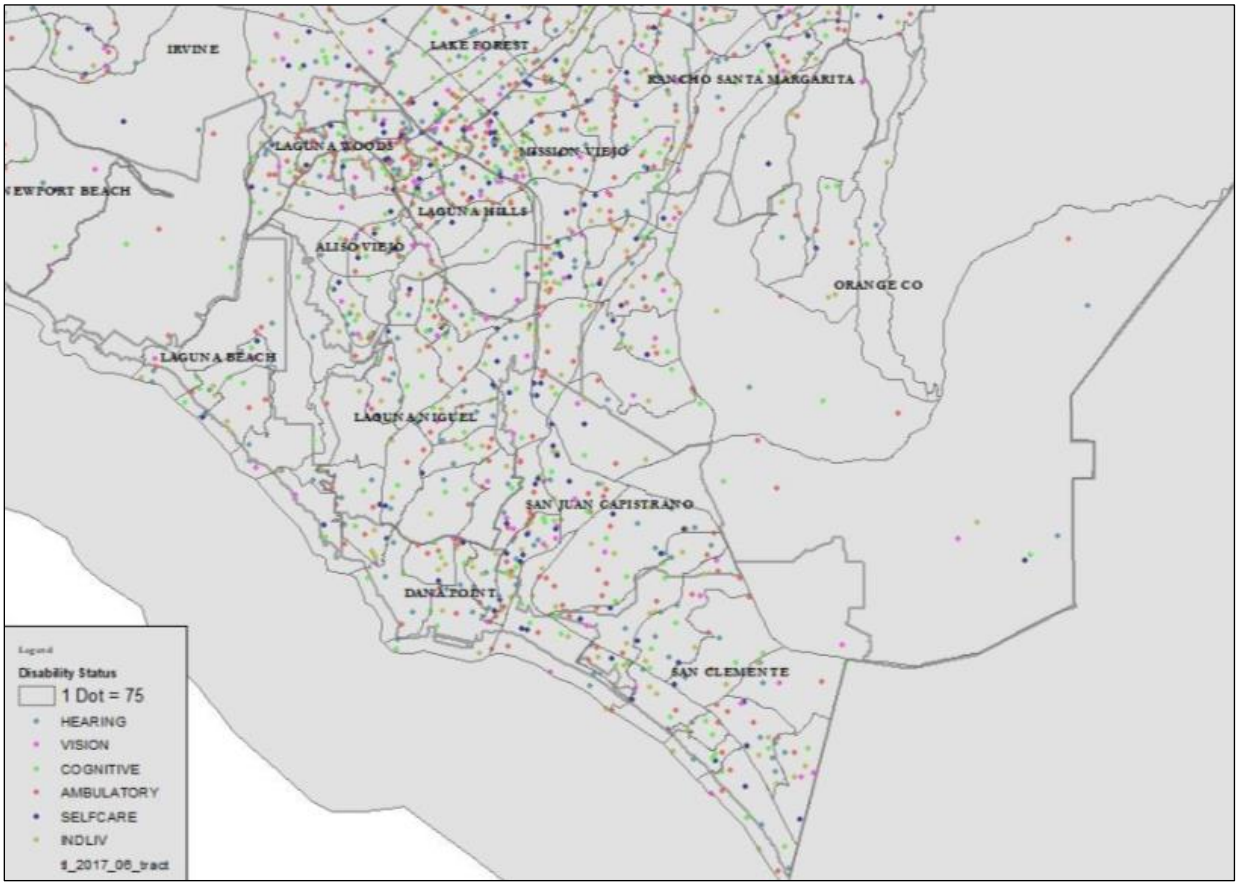
Percent of Population with Disabilities, South Orange County Region



~~Figure CP-7~~Figure CP-4
Percent of Population with Disabilities, Aliso Viejo



~~Figure CP-8~~Figure CP-5
Disability Status in South County



According to the 2020 AI, "In Aliso Viejo…concentrations of persons with various types of disabilities are generally lower than they are countywide." The most common types of disabilities in the City (Table CP-39) are Ambulatory Difficulty (2.27%) and Cognitive Difficulty (2.25%). The AI found that throughout the county the supply of affordable, accessible units is insufficient to meet the need.

~~Table CP-36~~Table CP-39
Disability by Type, Orange County/Region/Aliso Viejo

Disability Type	Orange County		Region		Aliso Viejo	
	#	%	#	%	#	%
Hearing Difficulty	81,297	2.59%	333,537	2.53%	914	1.80%
Vision Difficulty	51,196	1.63%	247,670	1.88%	503	0.99%
Cognitive Difficulty	99,317	3.16%	480,601	3.65%	1,140	2.25%
Ambulatory Difficulty	133,232	4.24%	677,592	5.14%	1,148	2.27%
Self-Care Difficulty	61,615	1.96%	327,895	2.49%	669	1.32%
Independent Living Difficulty	104,705	3.34%	526,534	4.00%	913	1.80%

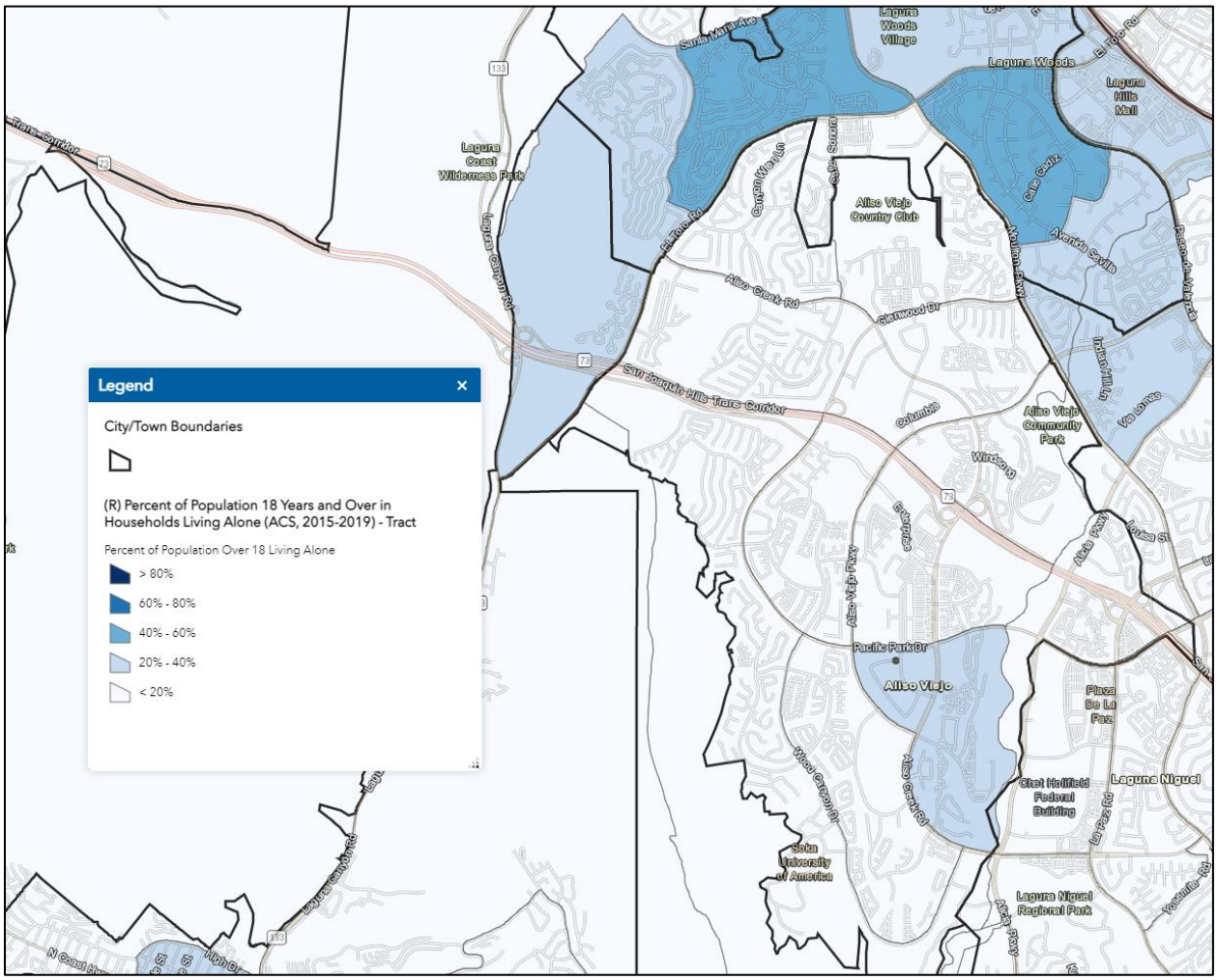
Familial Status

Familial status refers to the presence of children under the age of 18, whether the child is biologically related to the head of household, and the martial status of the head of households. According to the HCD AB686/AFFH data tool maps (Figure CP-6), there is no high concentration of households with adults living alone in the City. Conversely, in the remainder of the City's Census tracts, the percentage of adults living with their spouse is 60 percent and above (Figure CP-7).

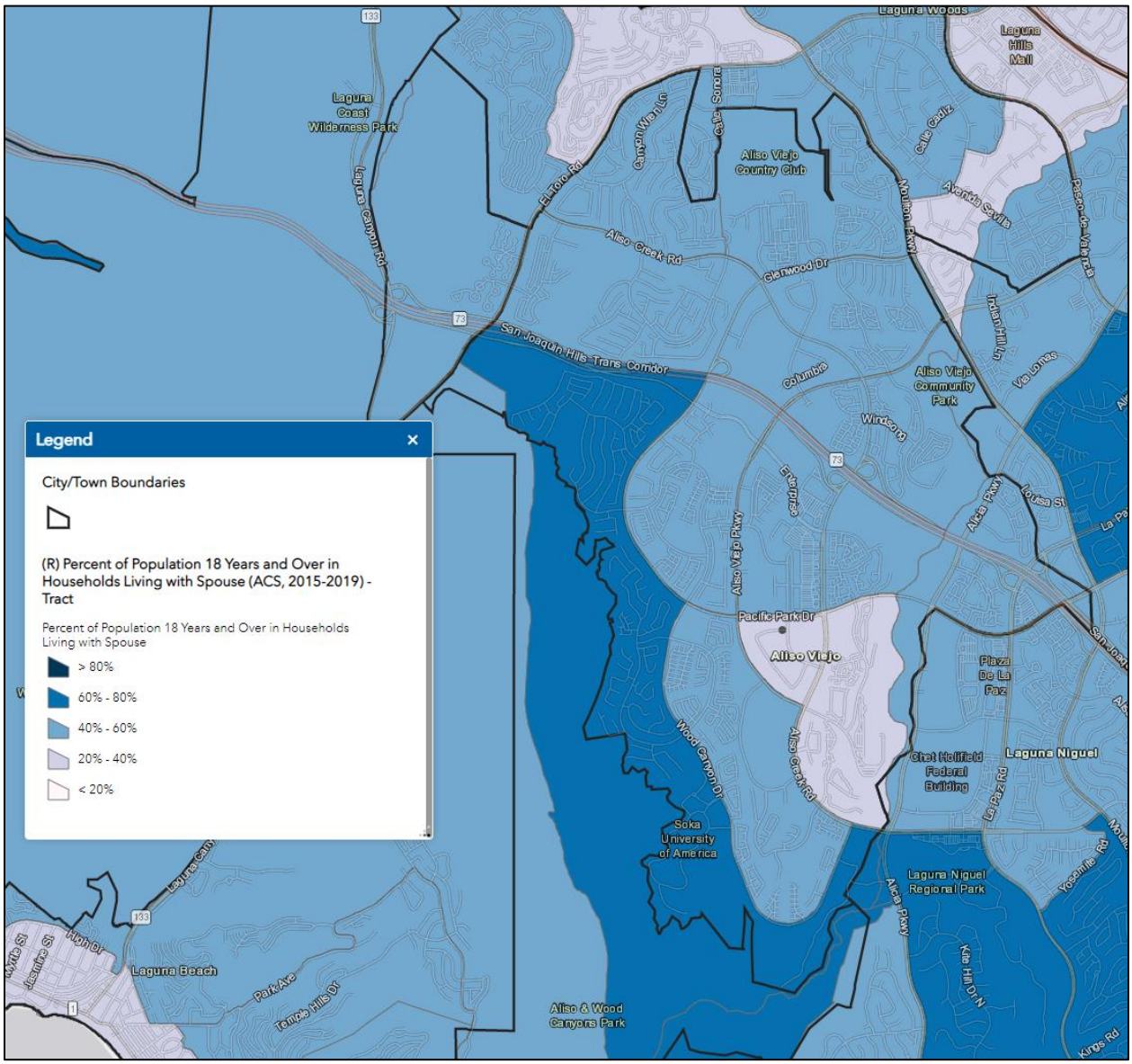
Families with children may face housing discrimination by landlords who fear that children will cause property damage. Some landlords may have cultural biases against children of the opposite sex sharing a bedroom. Differential treatments such as limiting the number of children in a complex or confining children to a specific location are also fair housing concerns. Single-parent households are also protected by fair housing law. 69.7 percent of Aliso Viejo households are families with children. The City's share of families with children is higher than the County average of 44.98 percent. According to the HCD AFFH map in Figure CP-8 the percentage of children in married households is high in most portions of the City. There is one Census tract that is in the 40 to 60 percent range.

Female-headed households with children require special consideration and assistance because of their greater need for affordable housing and accessible day care, health care, and other supportive services. In Aliso Viejo, female headed households are concentrated in a Census tract in the southeastern area of the City (Figure CP-9). This tract has 20 to 40 percent of children living in female-headed households, compared to less than 20 percent in the remainder of the City.

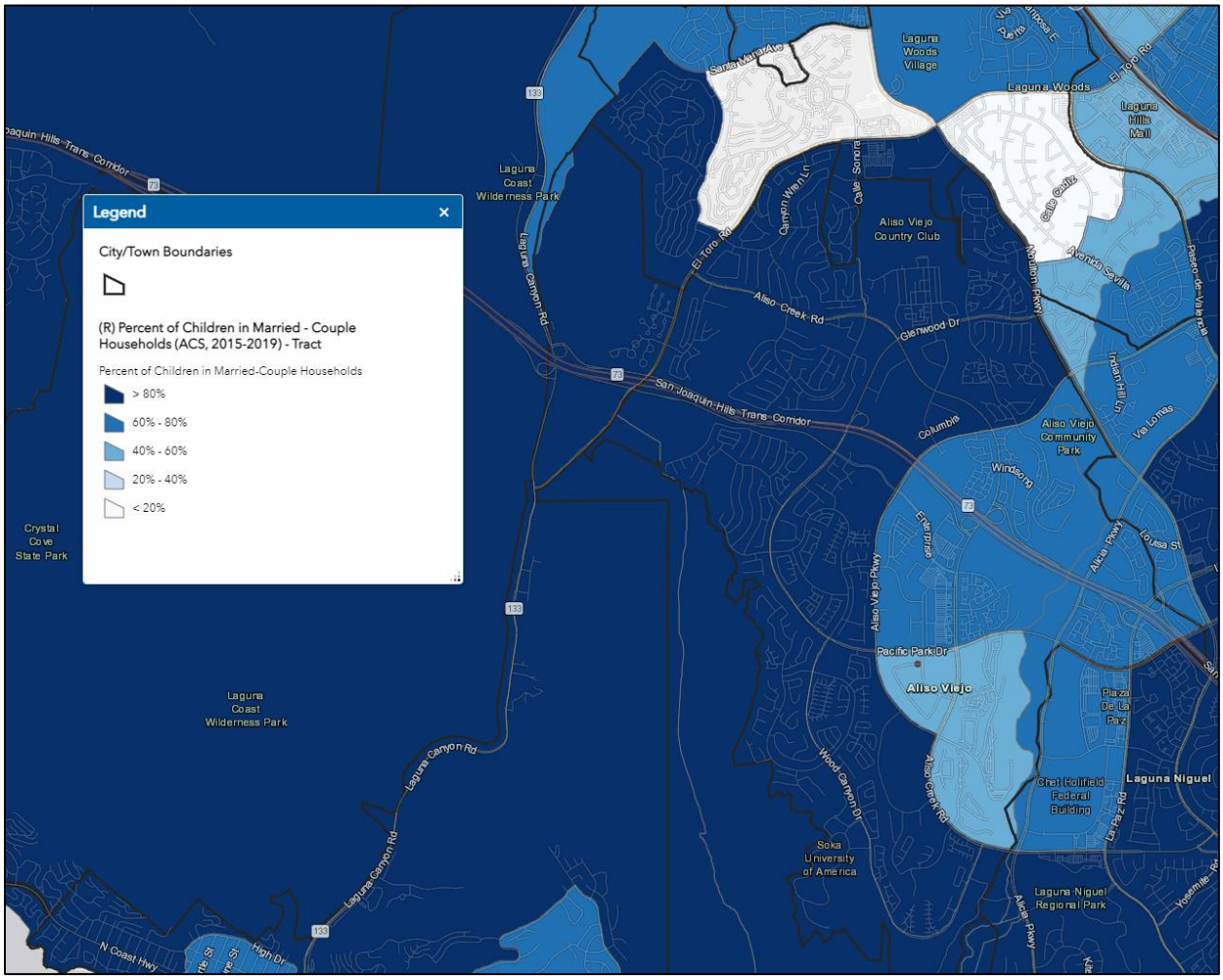
~~Figure CP-9~~Figure CP-6
Percentage of Adults Living Alone, Aliso Viejo



~~Figure CP-10~~Figure CP-7
Percentage of Adults Living with their Spouse, Aliso Viejo

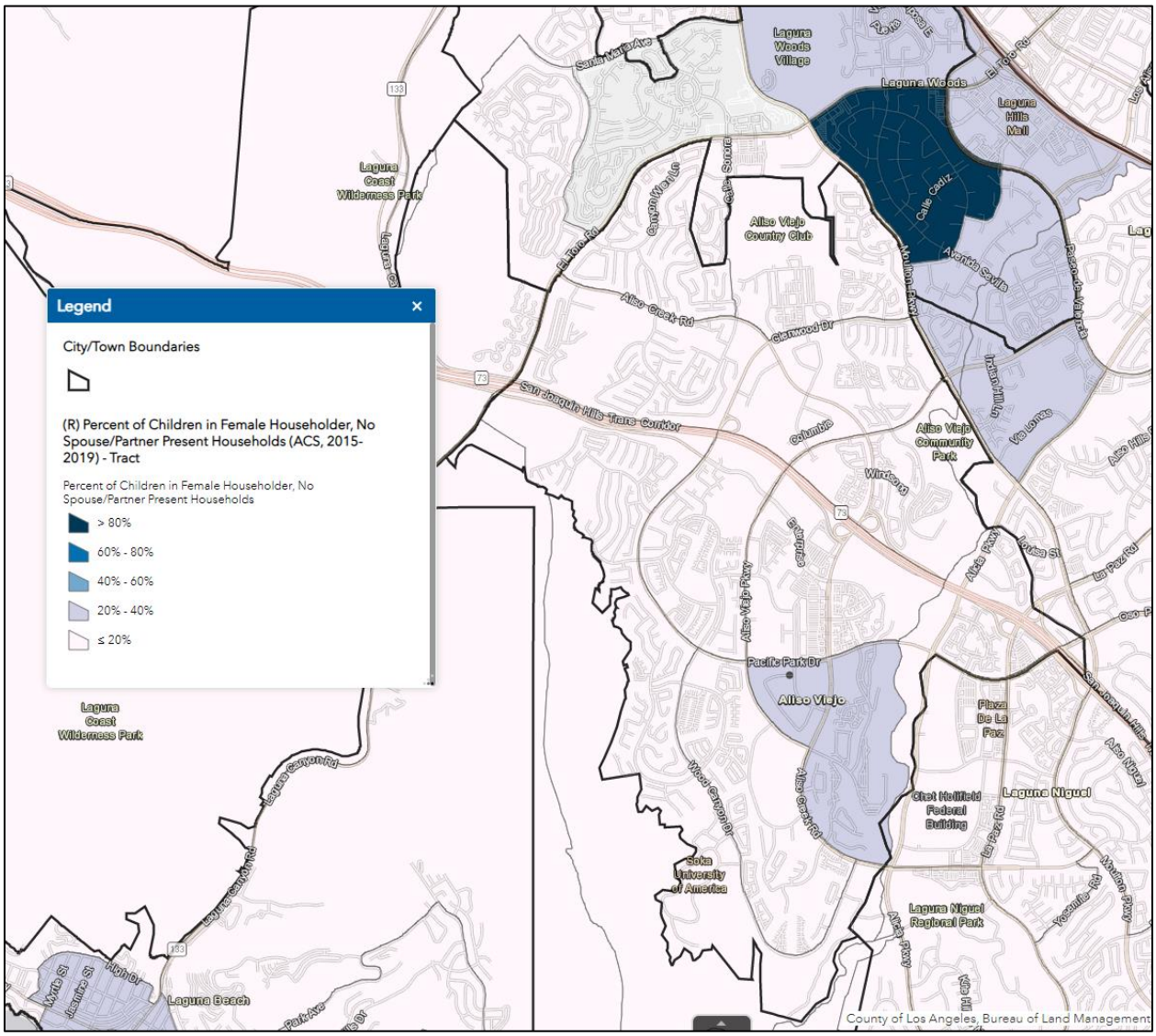


~~Figure CP-11~~Figure CP-8
Percentage of Children in Married Couple Households, Aliso Viejo



~~Figure CP-12~~Figure CP-9

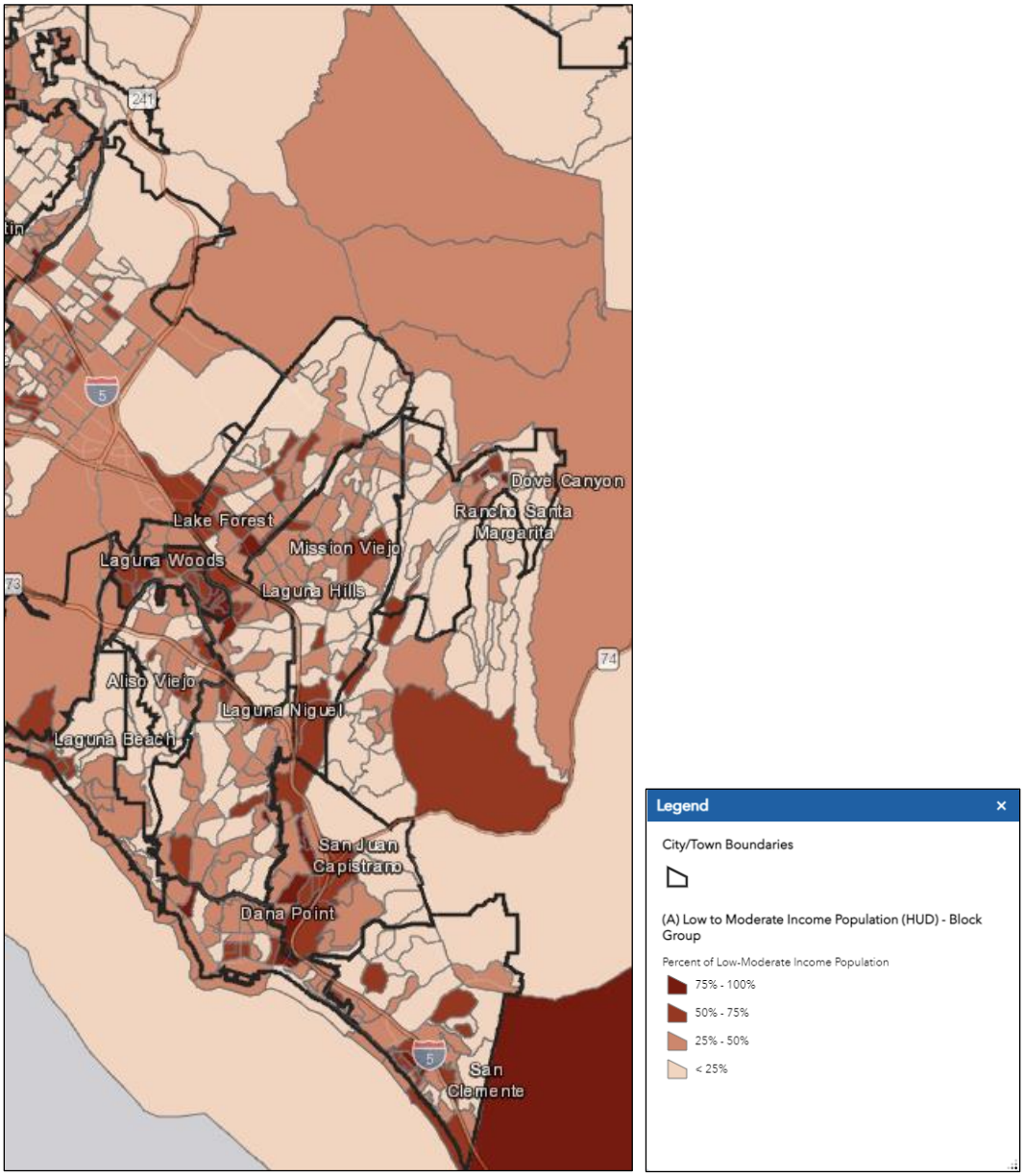
Percentage of Children in Single Female-Headed Households, Aliso Viejo



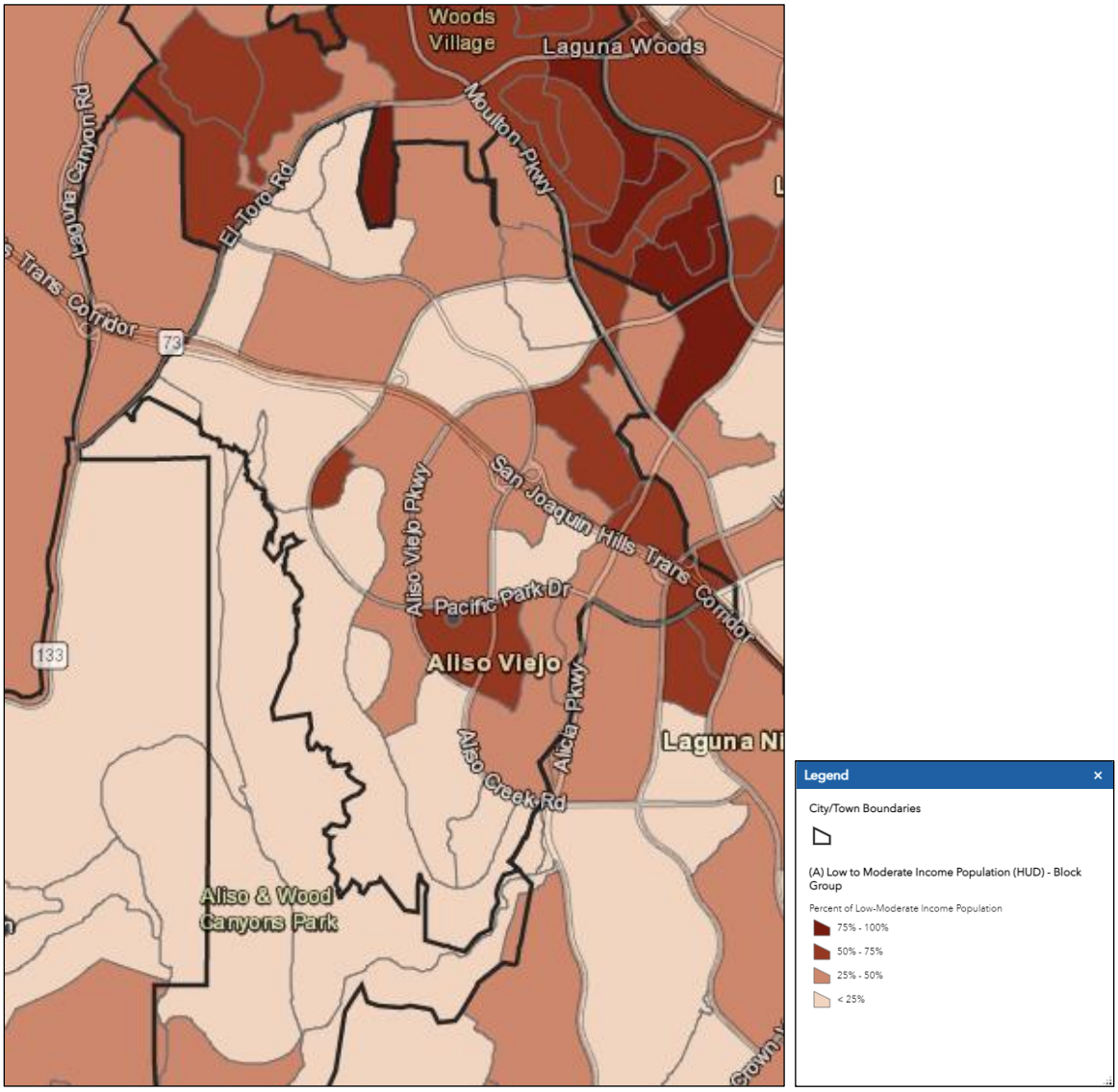
Income Level

Identifying low- or moderate-income (LMI) geographies and individuals is important in overcoming patterns of segregation. Figure CP-10 shows the LMI areas in South Orange County by Census block group. HUD defines an LMI area as a Census tract or block group where over 51 percent of the population is LMI (based on HUD income definition of up to 80 percent of the AMI). LMI areas are scattered all across the South County region. Similarly, LMI areas are scattered through Aliso Viejo with the greatest concentration in the northern and eastern portions of the City (Figure CP-11).

~~Figure CP-13~~Figure CP-10
Low and Moderate Income (LMI) Areas, South Orange County



~~Figure CP-14~~Figure CP-11
Low and Moderate Income (LMI) Areas, Aliso Viejo

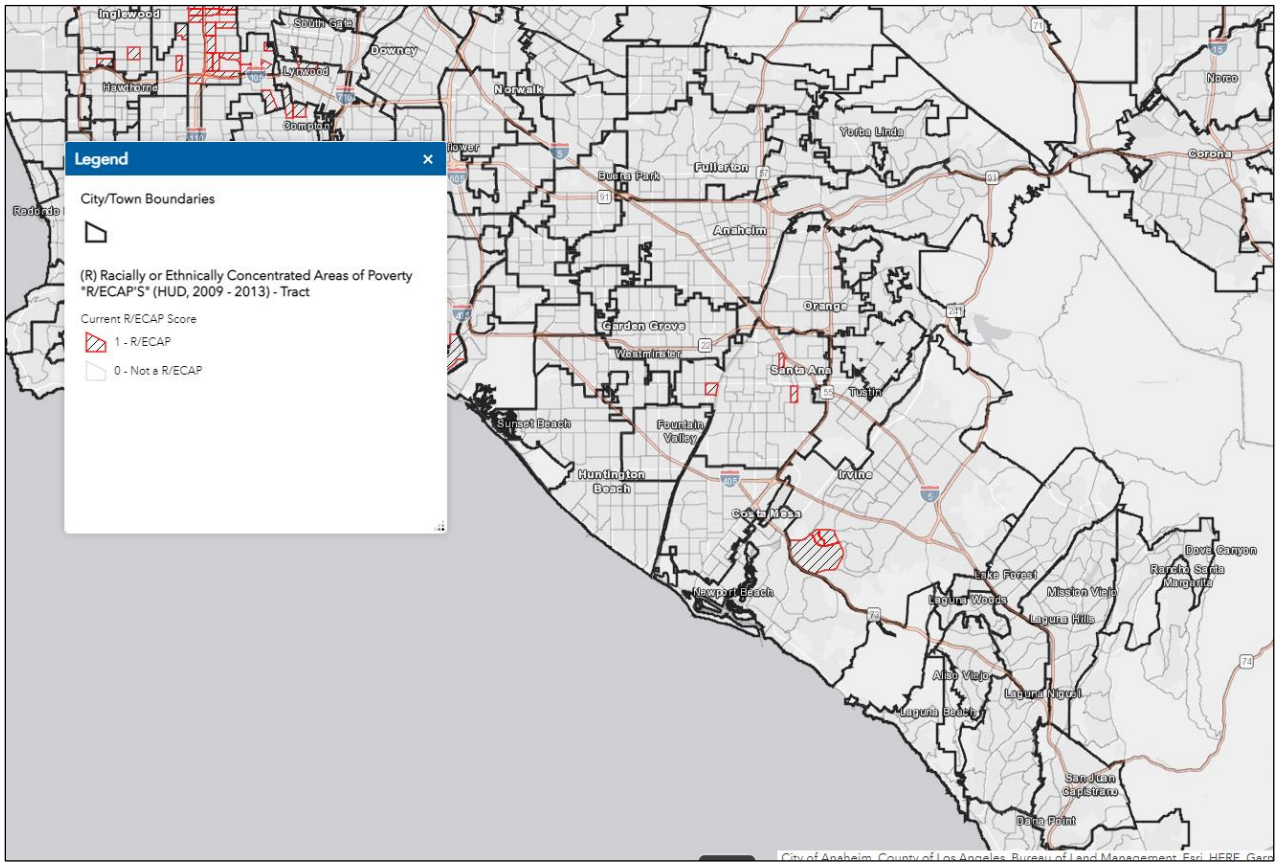


RACIALLY AND ETHNICALLY CONCENTRATED AREAS

Racially/Ethnically Concentrated Areas of Poverty

In an effort to identify racially/ethnically concentrated areas of poverty (R/ECAPs), HUD has identified Census tracts with a majority non-White population (greater than 50 percent) and a poverty rate that exceeds 40 percent, or is three times the average Census tract poverty rate for the metro/micro area, whichever threshold is lower. In Orange County, R/ECAPs are scattered in small sections in four areas, consisting of six Census tracts. There are no R/ECAPs in Aliso Viejo.

~~Figure CP-15~~Figure CP-12
Racially/Ethnically Concentrated Areas of Poverty (R/ECAPs), Orange County



Racially Concentrated Areas of Affluence

While racially concentrated areas of poverty and segregation have long been the focus of fair housing policies, racially concentrated areas of affluence (RCAAs) must also be analyzed to ensure housing is integrated, a key to fair housing choice. According to a policy paper published by HUD, RCAA is defined as affluent, White communities.

RCAAs have not been studied extensively nor has a standard definition been published by HCD or HUD. For purposes of this fair housing assessment, the percentage White population and median household income are used as proxies to identify potential areas of affluence. Figure CP-13 shows that the City has multiple Census tracts with a high concentration of Whites and high median income (greater than $100,000). Surrounding cities have similar characteristics.

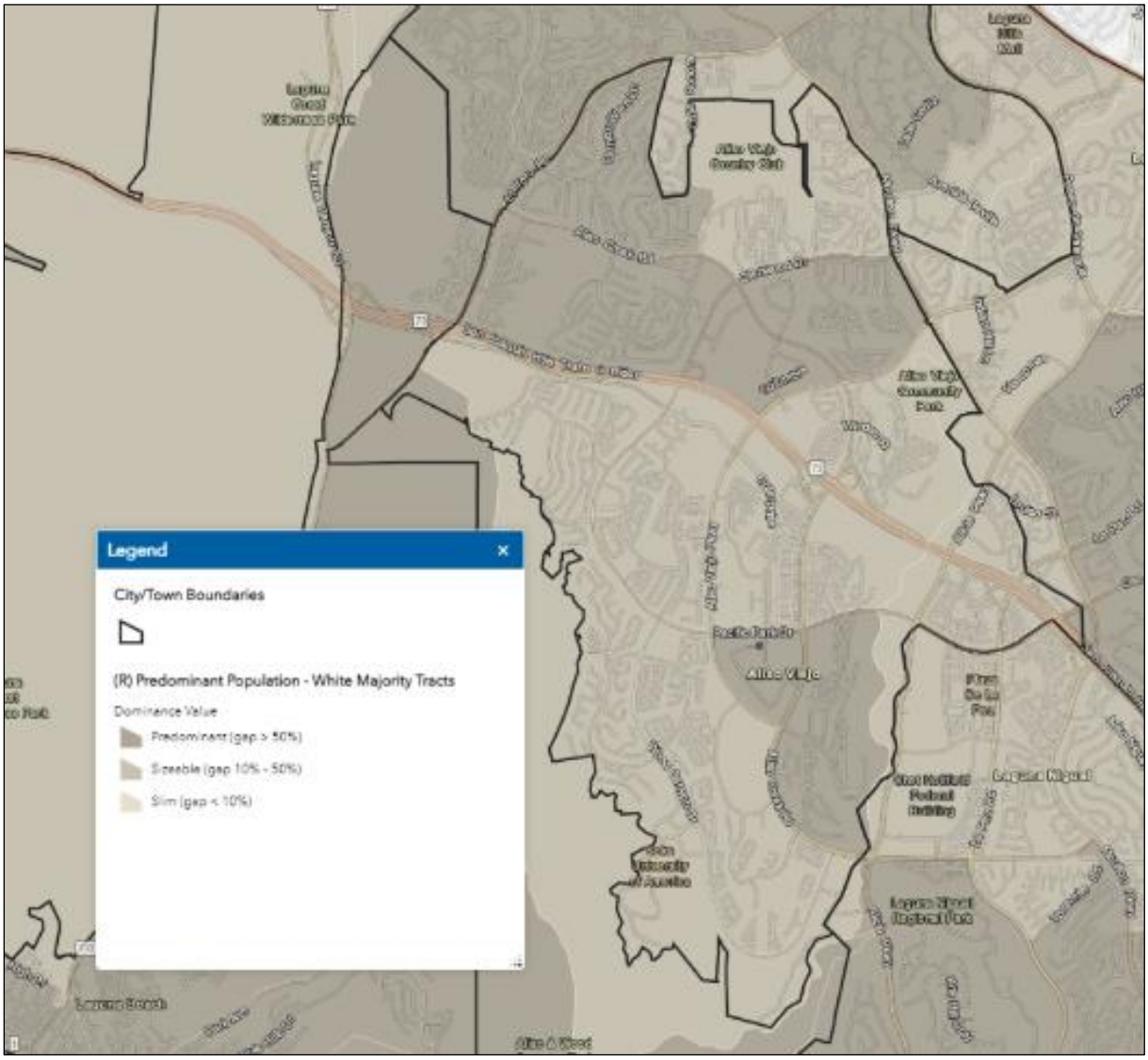
As Table CP-40 shows, White households also tend to have higher median incomes than all the population. In Aliso Viejo, White households earn about $1,000 more than all households and make up 67% of the population.

~~Table CP-37~~Table CP-40
White Household Income and Percent Population

	Aliso Viejo	Orange County
Median Household Income		
All Households	$112,689	$90,234
White Alone	$113,853	$101,958
White Population	67%	52.0%

Source: 2019 American Community Survey, 5-year estimates.

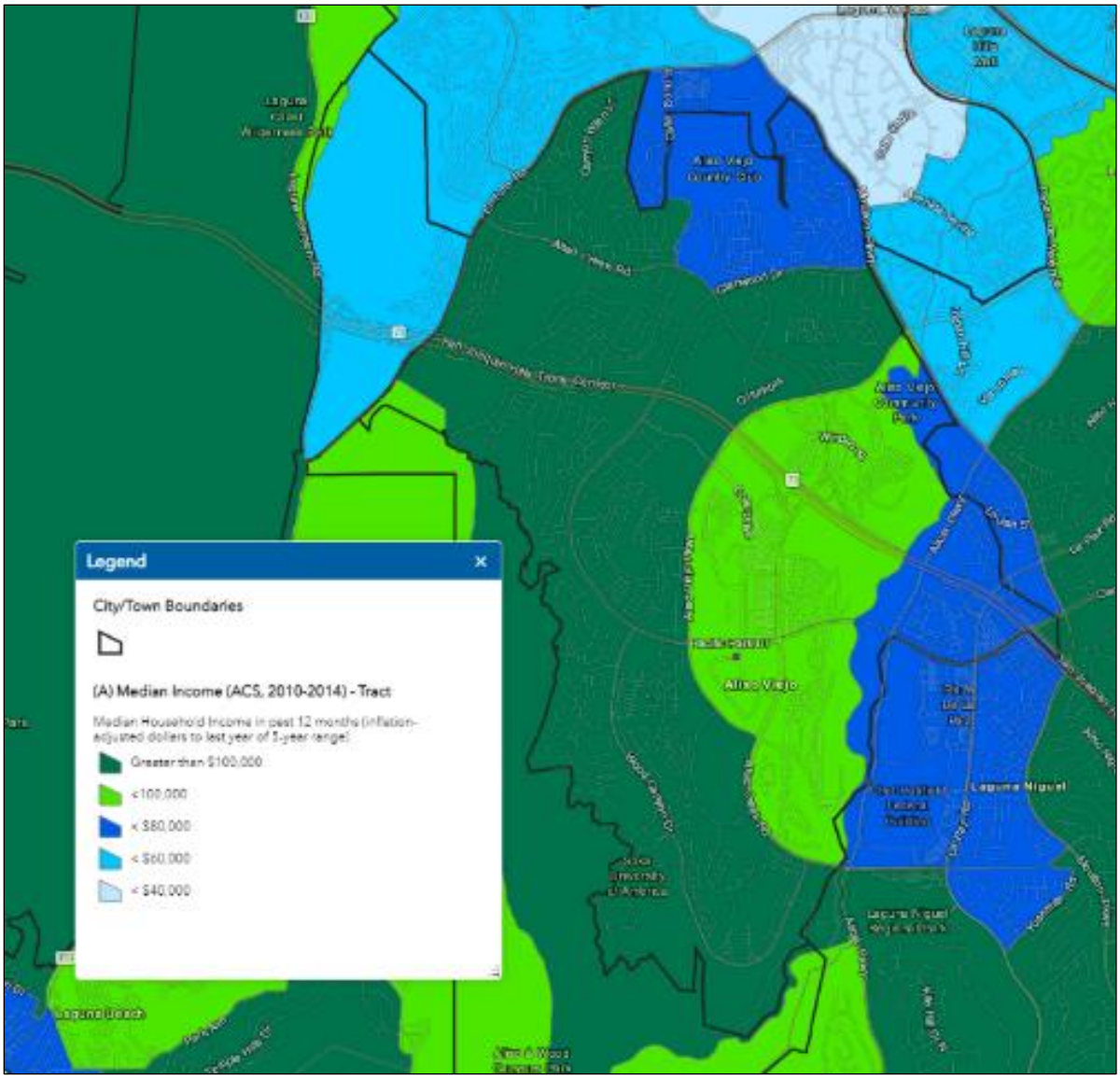
~~Figure CP-16~~Figure CP-13
White Population and Median Income Distribution



ACCESS TO OPPORTUNITY

TCAC/HCD Opportunity Maps

The 2021 TCAC/HCD Opportunity Maps are made from composite index scores of three different domains (economic, environmental, and education) to categorize tracts as low, moderate, or high resource (Table CP-41 shows the full list of indicators). Categorization is based on percentile rankings for Census tracts within the Orange County Region. Higher composite scores mean higher resources. The 2021 TCAC/HCD opportunity maps identified 12 of the 14 Census tracts in Aliso Viejo as High Resource (Table CP-42). One tract was scored as low resource and one as moderate but rapidly changing.



~~Table CP-38~~Table CP-41
Domains and List of Indicators for Opportunity Maps

Domain	Indicator
Economic	Poverty Adult Education Employment Job Proximity Median home value
Environmental	CalEnviroScreen 3.0 pollution Indicators and values
Education	Math proficiency Reading proficiency High School graduation rates Student poverty rates

Source: California Fair Housing Task Force, Methodology for the 2020 TCA/HCD Opportunity Maps,

~~Table CP-39~~Table CP-42
Opportunity Map Scores and Categorization (2021)

Census Tract	Economic Domain Score	Environmental Domain Score	Education Domain Score	Composite Index Score	Final Category
06059042320	0.437	0.847	0.678	0.316	High Resource
06059042334	0.312	0.867	0.724	0.285	High Resource
06059062632	0.875	0.636	0.974	0.624	Highest Resource
06059062633	0.898	0.941	0.934	0.709	Highest Resource
06059062634	0.709	0.834	0.723	0.455	Highest Resource
06059062635	0.905	0.927	0.7	0.556	Highest Resource
06059062636	0.556	0.839	0.756	0.414	High Resource
06059062637	0.574	0.849	0.756	0.427	Highest Resource
06059062638	0.653	0.948	0.934	0.599	Highest Resource
06059062639	0.726	0.886	0.619	0.395	High Resource
06059062640	0.444	0.87	0.594	0.268	High Resource
06059062641	0.598	0.821	0.442	0.144	Moderate Resource (Rapidly Changing)
06059062648	0.002	0.925	0.388	-0.439	Low Resource
06059062649	0.34	0.882	0.7	0.283	High Resource

Source: California Fair Housing Task Force, TCAC/HCD Opportunity Maps, 2020 Statewide Summary Table, December 2020

Opportunity Indicators

The 2020 AI used opportunity indicators developed by HUD to help inform communities about disparities in access to opportunity.

Education

According the 2020 AI, jurisdictions with the highest educational opportunity also appeared to have primarily large concentrations of non-Hispanic Whites and Asian/Pacific Islanders. Irvine, Aliso Viejo, and Huntington Beach were provided as good examples of cities with large populations of those two groups. Other high opportunity cities, by contrast, appear more segregated and more heavily populated by non-Hispanic Whites.

Employment

According to the CA Employment Development Department, in 2020 the average unemployment rate in California was 10.1 percent. For Orange County the rate was 8.8 percent and for the City of Aliso Viejo the unemployment rate in 2020 was 7.5 percent.

Transportation

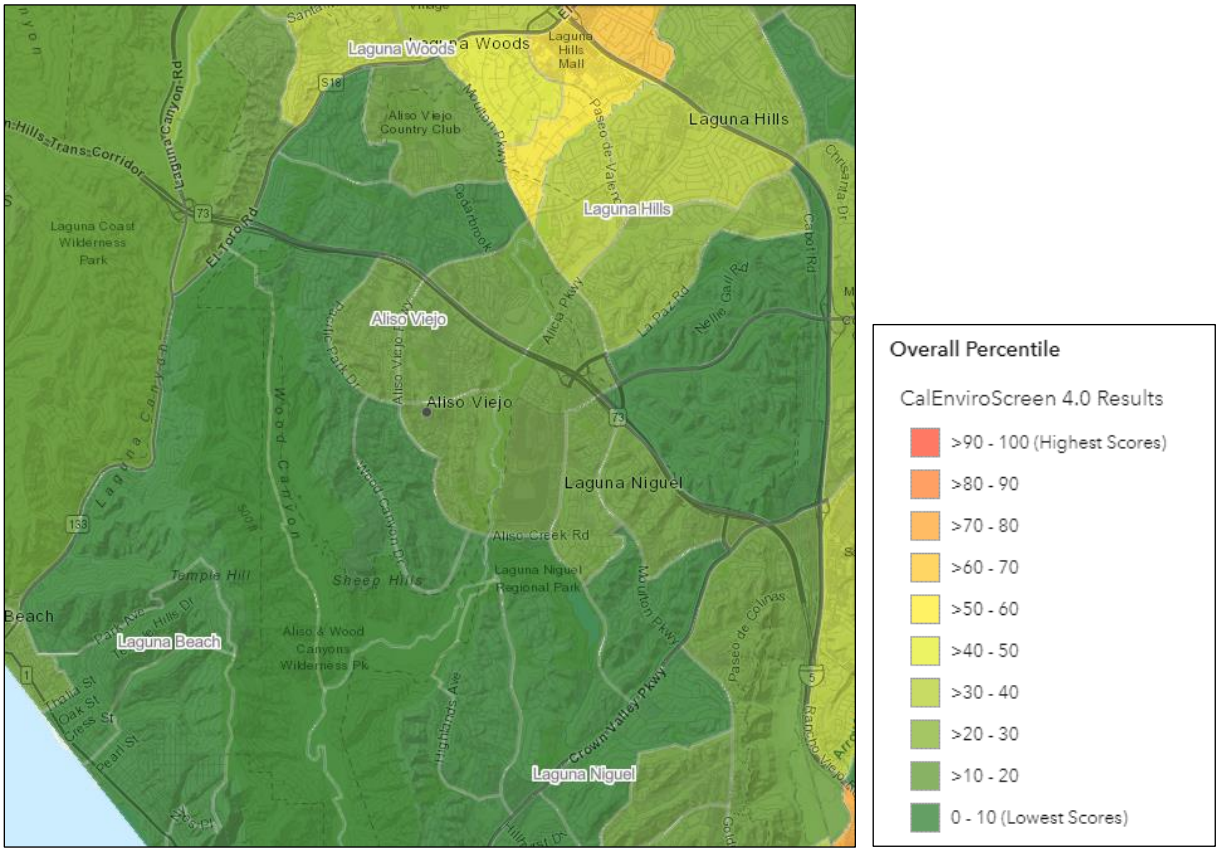
All Transit explores metrics that reveal the social and economic impact of transit, specifically looking at connectivity, access to jobs, and frequency of service. According to the data provided by the 2020 AI:

> "There are no significant disparities between racial/ethnic groups in the low transportation cost index in most jurisdictions in Orange County. Index scores are in the 20s for all groups in Laguna Niguel, Mission Viejo, and San Clemente. Scores are in the low to mid 30s for all racial/ethnic groups in Buena Park, Lake Forest, La Palma, Orange City. Scores are in the high 30s to low 40s for all groups in Aliso Viejo, Anaheim, Fountain Valley, Fullerton, Garden Grove, Irvine, Huntington Beach, La Habra. Scores are moderate (in the high 40s to low 50s) across groups in Costa Mesa, Santa Ana, and Westminster."

Environmental

The California Office of Environmental Health Hazard Assessment (OEHHA) developed a screening methodology called the California Communities Environmental Health Screening Tool (CalEnviroScreen) to help identify California communities disproportionately burdened by multiple sources of pollution. High scoring Census tracts tend to be more burdened by pollution from multiple sources and are most vulnerable to its effects, taking into account their socioeconomic characteristics and underlying health status. Aliso Viejo had relative low scores, with two Census tracts in the lowest range (1 to 5 percent), two in the 5 to 10 percent range, four in the 10 to 15 percent range and two in the 15 to 20 percent range.

~~Figure CP-17~~Figure CP-14
CalEnviroScreen 4.0 Percentile Scores



DISPROPORTIONATE HOUSING NEEDS

The AFFH Rule Guidebook defines *disproportionate housing needs* as "a condition in which there are significant disparities in the proportion of members of a protected class experiencing a category of housing needs when compared to the proportion of a member of any other relevant groups or the total population experiencing the category of housing need in the applicable geographic area." 24 C.F.R. § 5.152" The analysis is completed by assessing cost burden, severe cost burden, overcrowding, and substandard housing.

The Comprehensive Housing Affordability Strategy (CHAS) developed by the Census Bureau for HUD provides detailed information on housing needs by income level for different types of households. Housing problems considered by CHAS include:

- Housing cost burden, including utilities, exceeding 30 percent of gross income;
- Severe housing cost burden, including utilities, exceeding 50 percent of gross income;
- Overcrowded conditions (housing units with more than one person per room); and/or
- Units with physical defects (lacking complete kitchen or bathroom)

As shown in Table CP-43, a higher percentage of Black (62 percent) and Hispanic (44 percent), households experience housing problems compared to White (39 percent), Asian (35 percent), and all City households (39 percent). Families with more than five members also experience housing problems disproportionately (50 percent). Aliso Viejo households experience housing problems (47 percent) at lower rates than the County overall (51 percent).

~~Table CP-40~~Table CP-43
Demographics of Households with Disproportionate Housing Needs, Aliso Viejo

Households Experiencing Any of 4 Housing Problems	Households with Problems	Number of Households	Percentage of Households with Problems
Race/Ethnicity			
White, Non-Hispanic	4,840	12,570	38.50%
Black, Non-Hispanic	235	380	61.84%
Hispanic	930	2,120	43.87%
Asian or Pacific Islander, Non- Hispanic	995	2,830	35.16%
Native American, Non-Hispanic	20	70	28.57%
Total	7,020	17,970	39.07%
Household Type and Size			
Family households, <5 people	3,955	11,390	34.72%
Family households, 5+ people	705	1,420	49.65%
Non-family households	2,635	5,605	47.01%

Households Experiencing Any of 4 Severe Housing Problems	Households with Severe Problems	Number of Households	Percentage of Households with Severe Problems
Race/Ethnicity			
White, Non-Hispanic	2,075	12,570	16.51%
Black, Non-Hispanic	140	380	36.84%
Hispanic	400	2,120	18.87%
Asian or Pacific Islander, Non- Hispanic	425	2,830	15.02%
Native American, Non-Hispanic	0	70	0.00%

Cost Burden

A household is considered cost burdened if it spends more than 30 percent of its income in housing costs, including utilities. Black (37 percent) and White (15 percent) households in Aliso Viejo experience cost burdens at higher rates than the Citywide average (14 percent).

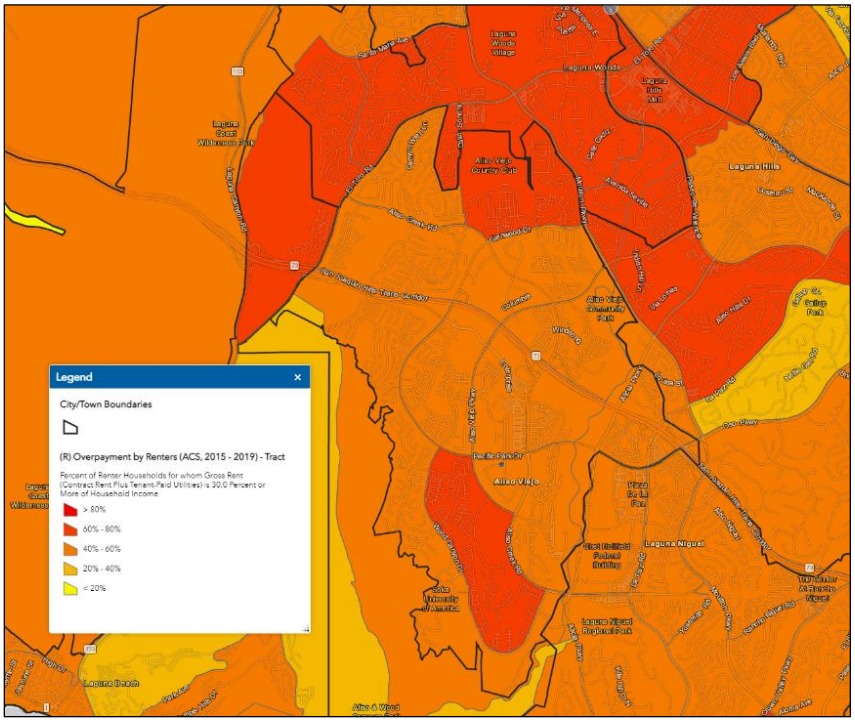
~~Table CP-41~~Table CP-44

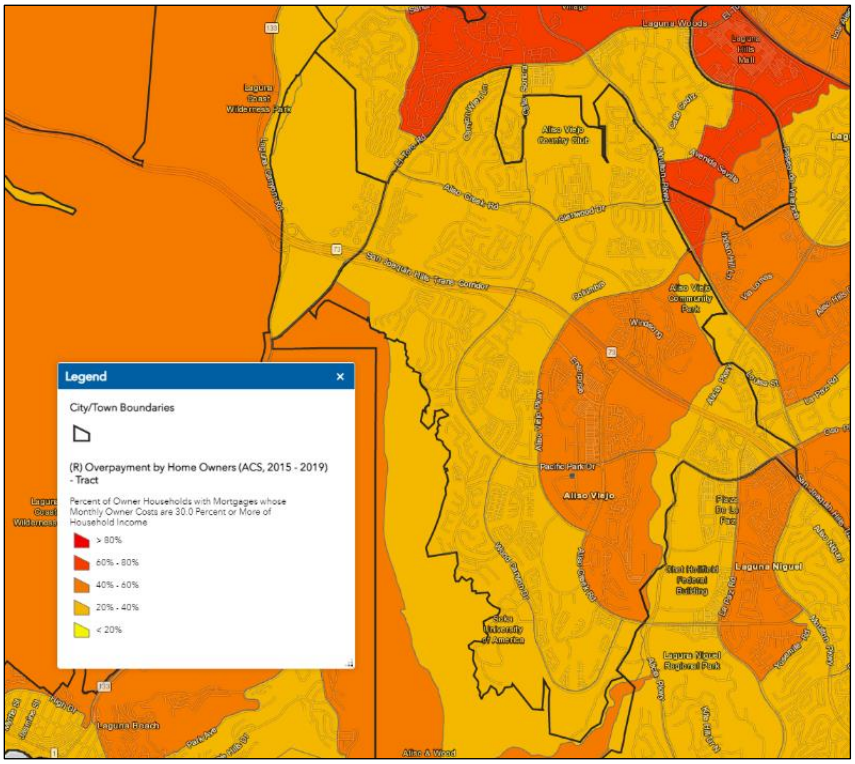
Demographics of Households with Severe Housing Cost Burden, Aliso Viejo

Households Experiencing Severe Housing Cost Burden	Households with Severe Cost Burden	Number of Households	Percentage of Households with Severe Cost Burden
Race/Ethnicity			
White, Non-Hispanic	1840	12,570	14.64%
Black, Non-Hispanic	140	380	36.84%
Hispanic	225	2,120	10.61%
Asian or Pacific Islander, Non- Hispanic	350	2,830	12.37%
Native American, Non-Hispanic	0	70	0.00%
Total	2,555	17,970	14.22%
Household Type and Size			
Family households, <5 people	1010	11390	8.87%
Family households, 5+ people	150	1420	10.56%
Non-family households	730	5605	13.02%

~~Figure CP-18~~Figure CP-15

Cost Burdened/Overpayment for Renters and Owners – Aliso Viejo





Overcrowding

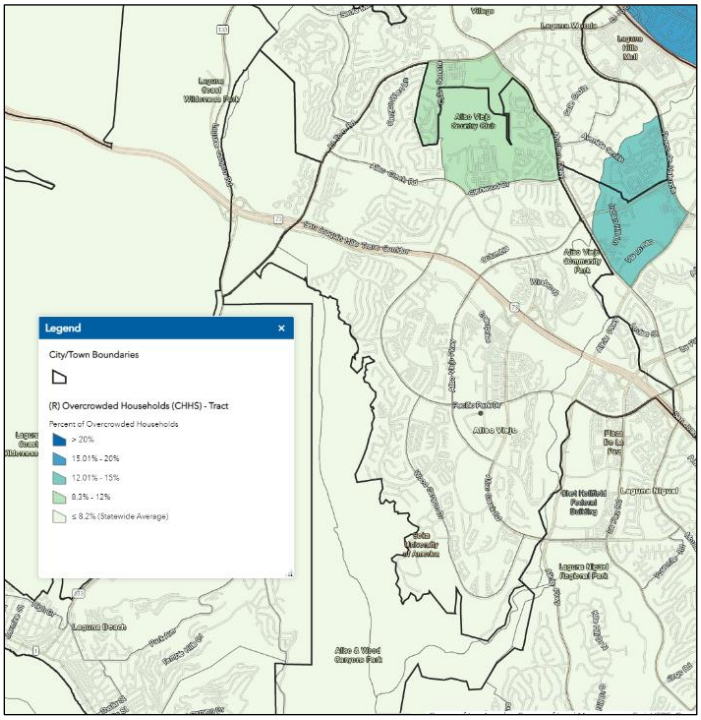
Overcrowding is defined as housing units with more than one person per room (including dining and living rooms but excluding bathrooms and kitchen). According to the 2018 five-year ACS estimates, a lower percentage of households across all ethnic groups in Aliso Viejo are living in overcrowded conditions as compared to the County as a whole. There is one Census tract in the northern portion of the City with a higher rate of overcrowding than the rest of the City, with between 8.3 and 12 percent of the population living in overcrowded conditions (Figure CP-16).

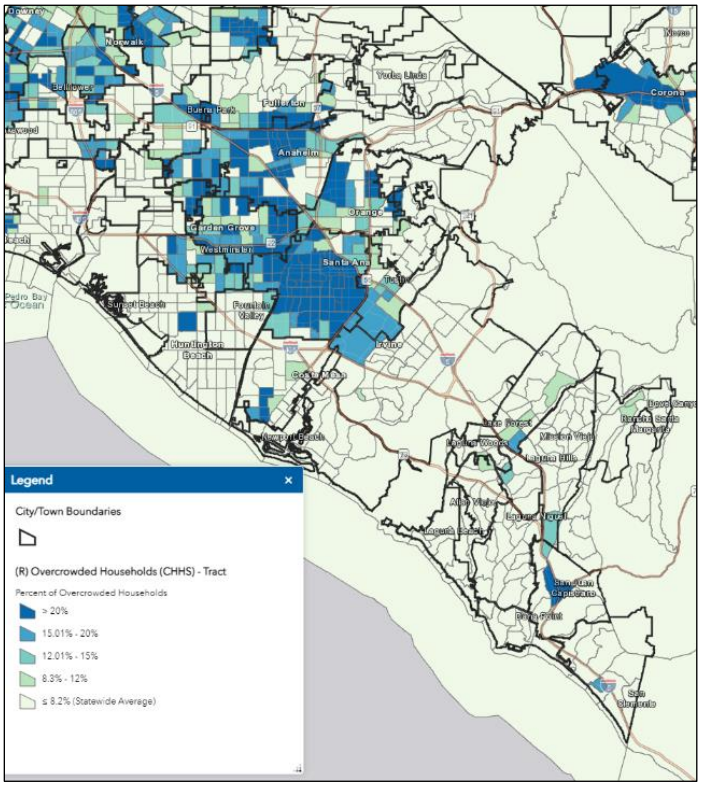
~~Table CP-42~~Table CP-45

Percentage of Overcrowded Households by Race or Ethnicity, Aliso Viejo vs. Orange County

Geography	White, Non-Hispanic	Black	Native American	Asian American, Pacific Islander	Hispanic
Orange County	1.95%	6.52%	11.38%	7.76%	25.72%
Aliso Viejo	1.47%	0.00%	0.00%	2.79%	7.47%

~~Figure CP-19~~Figure CP-16
Overcrowded Households, Aliso Viejo vs. Orange County





Substandard Conditions

The City estimates that less than 2 percent of homes in Aliso Viejo are in substandard condition based on American Home Survey (AHS) data. According to AHS, there are 219 homes without any fuel used, 19 homes without complete plumbing facilities, 191 homes lacking complete kitchen facilities, and 223 without telephone services.

Housing age is frequently used as an indicator of housing condition. In general, residential structures over 30 years of age require minor repairs and modernization improvements, while units over 50 years of age are likely to require major rehabilitation such as roofing, plumbing, and electrical system repairs. As the newest City in Orange County, the majority of the City's housing is less than 30 years old. Approximately 70 percent of the City's housing is less than 30 years old, while less than 6 percent of the housing is older than 50 years.

~~Table CP-43~~Table CP-46

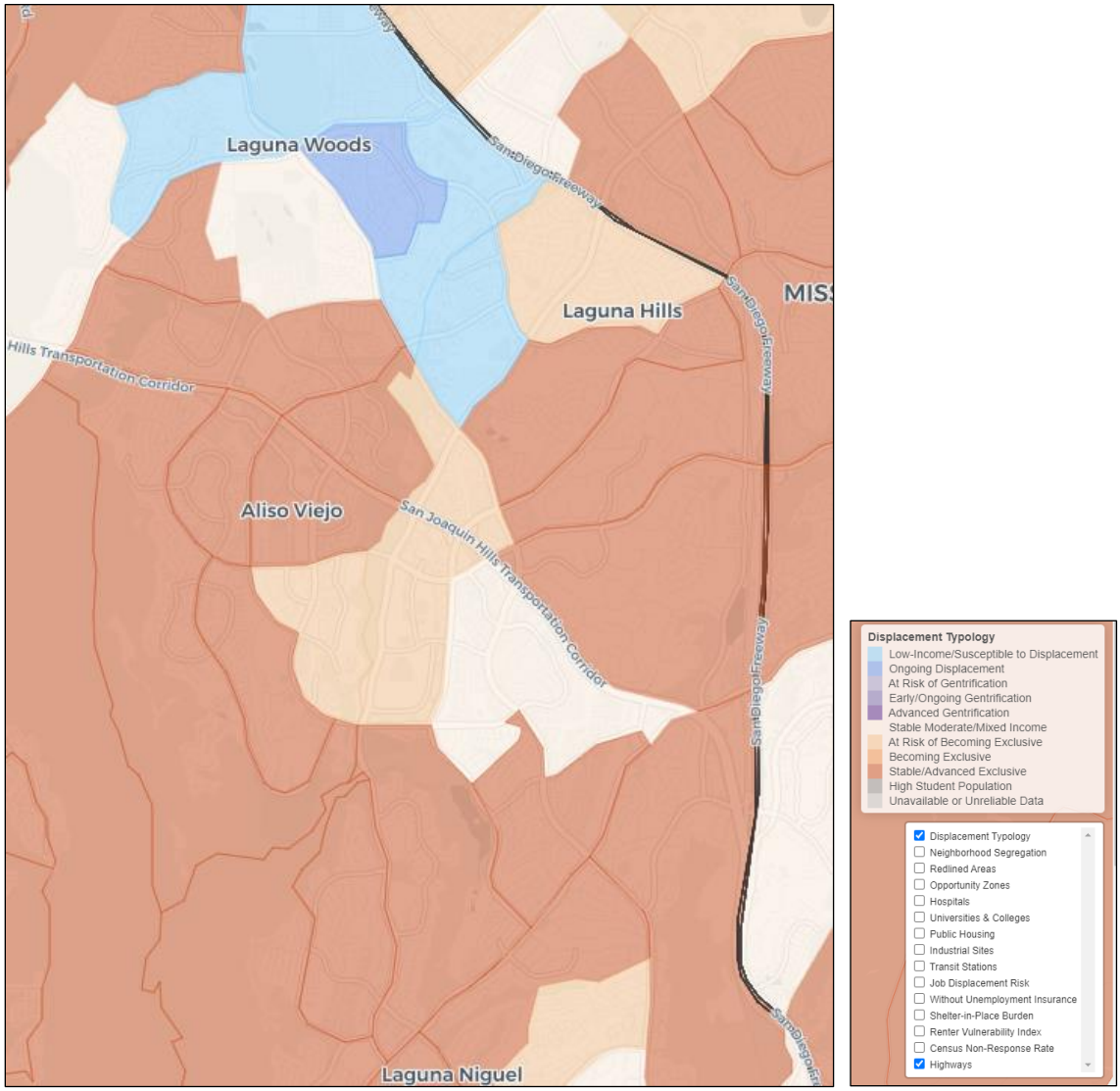
Number of Housing Units by Year Built, Aliso Viejo

Year Structure Built	Number	Margin of Error	Percentage	Margin of Error
Built 2014 or later	257	±75	1.3%	±0.4
Built 2010 to 2013	515	±133	2.6%	±0.7
Built 2000 to 2009	2,260	±279	11.5%	±1.5
Built 1990 to 1999	10,623	±484	54.2%	±2.1
Built 1980 to 1989	4,799	±332	24.5%	±1.6
Built 1970 to 1979	795	±171	4.1%	±0.9
Built 1960 to 1969	153	±91	0.8%	±0.5
Built 1950 to 1959	155	±96	0.8%	±0.5
Built 1940 to 1949	41	±48	0.2%	±0.2
Built 1939 or earlier	9	±13	0.0%	±0.1
Total housing units	19,607	±384	19,607	–

Displacement Risk

UC Berkeley's Urban Displacement Project (2018) defines residential displacement as "the process by which a household is forced to move from its residence – or is prevented from moving into a neighborhood that was previously accessible to them because of conditions beyond their control." As part of this project, the Urban Displacement Project includes an interactive map that displays changes in neighborhood characteristics that may indicate displacement (Figure CP-17). Two key factors in visualizing displacement are the loss of low-income households and increases in rent. One area in Aliso Viejo is identified as being at-risk in the center of the City, south of the 73 Toll Road. There is a larger area identified as at-risk on the map; however, that is in a Census tract in an adjacent City.

~~Figure CP-20~~Figure CP-17
Displacement Typology, Aliso Viejo



Other Data

Tenure – Aliso Viejo's households are primarily homeowners. According to AHS data, just over 60 percent of households are owners while almost 40 percent are renters.

OUTREACH

The City of Aliso Viejo has recently hired a Public Information Officer/Management Analyst. A large portion of the job duties include updating the City's website, keeping residents and stakeholders current on City events through social media and producing a weekly e-News newsletter. Through this position and their responsibilities, the City intends to engage residents, businesses and other stakeholders in a more robust fashion.

LOCAL DATA AND KNOWLEDGE

The northeast portion of the City, known as Via Iglesia, differs from the remainder of Aliso Viejo in many ways. The Via Iglesia neighborhood was annexed from the County during incorporation but was not part of the City's original master plan. Via Iglesia consists of a series of fourplexes, unlike other areas of the City, and is largely Hispanic with its own community center and park. It consists of an older housing stock with lower incomes, and requires additional investment to maintain the quality of homes.

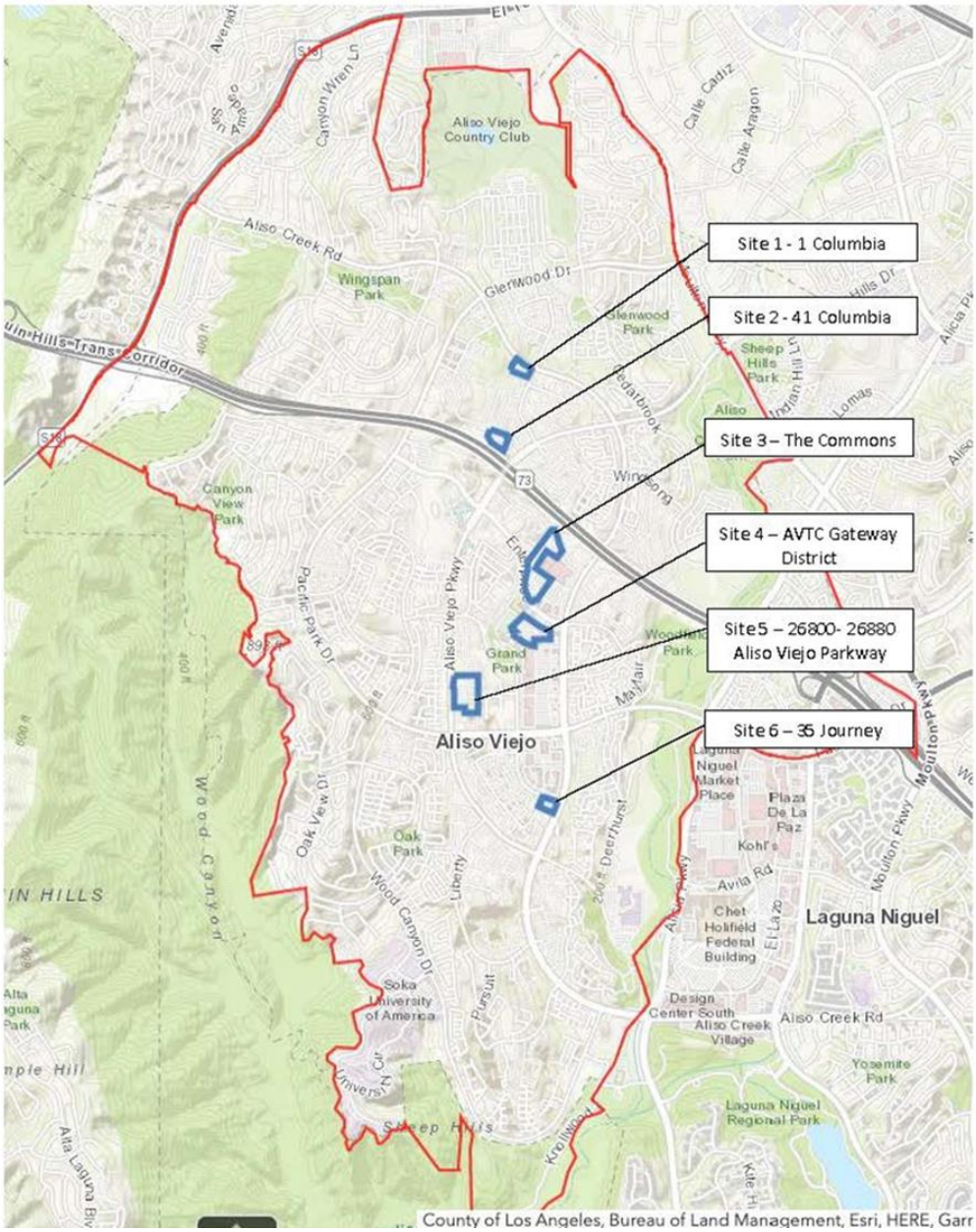
Staff also conducted a windshield survey on the City in November of 2021. It is estimated that 75% of the City's residential area was surveyed. The areas that were predominantly not included were gated communities.

Of the developments visited, the majority had no visible issues. For those that did have some level of disrepair, the most common issue was chipped or peeling paint (4 instances). Next were fencing issues (3), deteriorated fascia (2), dead or dying landscaping (2), and single instances of roof damage, cracks and general disrepair.

The data above does not include the Via Iglesia neighborhood, where the City found widespread instances of peeling fascia, cracks on garage doors, peeling/chipping paint; older roofs that may require repair or replacement; overflowing dumpsters, illegal electrical wiring, original HVAC systems, fencing in disrepair and possible illegal construction. With these widespread issues, the Via Iglesia community may be suitable for a housing revitalization grant program through use of CDBG funds.

SITES INVENTORY

The City's residential neighborhoods are virtually built out, and future residential development will likely occur within the City's mixed-use overlay. This RHNA strategy relies on underutilized office properties where residential uses would be permitted, as anticipated through a residential overlay zone. The locations of the candidate sites to accommodate future housing needs are distributed through the city as shown in the following map.



Integration and Segregation: Race and Income

Census tracts with the highest concentration of minorities and low/moderate-income population (LMI) are located in the northeastern part of the City. The sites inventory identified sites outside this area to offer additional opportunities for lower-income housing in areas with higher opportunity.

Racially/Ethnically Concentrated Areas of Poverty and Affluence

While no racially/ethnically concentrated areas of poverty (per HUD's definition) were found in Aliso Viejo, some tracts with a high concentration of minorities and LMI populations were found in the northeastern part of the City. Census Tract 626.33 can be considered a concentrated area of affluence as it has a large proportion of White population and the highest range in median income. Some sites feasible for lower-income housing and residential recycling sites identified in the sites inventory are in located in more affluent areas. However, sites identified in the sites inventory are locations with more access to opportunities.

Access to Opportunity

Based on the TCAC/HCD Opportunity Maps, the City is categorized as moderate resource to highest resources levels. The sites identified in the site inventory are located in tracts identified as high resource and highest resource. In addition, the City has identified properties in its sites inventory located all around the City.

Disproportionate Housing Needs

The fair housing assessment found Black (non-Hispanic) households have a higher percentage of households with problems at 61.84% in comparison to the County's 48.29% Black (non-Hispanic) households with problems. The sites inventory identified sites in high opportunity areas to provide access to opportunities and mitigate the disproportional housing needs.

IDENTIFICATION AND PRIORITIZATION OF CONTRIBUTING FACTORS

The following are contributing factors that affect fair housing choice in Aliso Viejo.

Insufficient and Inaccessible Housing Options in High Opportunity Area

The 2020 AI and the Fair Housing Assessment found there was a need to expand access of opportunity for people who identify with any protected classes.

Contributing Factors:

- Location and type of affordable housing
- Lack of access to opportunity due to high housing cost
- Lack of fair housing outreach and enforcement
- Availability of affordable housing
- Availability of affordable units in a range of sizes

Protecting Existing Residents from Displacement

The analysis found a concentration of households vulnerable to displacement. Based on the AFFH Data Viewer, the households at vulnerable to displacement are towards the center of the city.

Contributing Factors:

- Displacement of residents due to economic pressures
- Availability of affordable housing
- Availability of affordable units in a range of sizes

Provide Access and Inclusion for Persons with Disabilities

To address the insufficient number of housing units for persons with disabilities across the county, the City adopted a Housing and Reasonable Accommodation regulation and procedures.

Contributing Factors:

- Lack of supportive services for persons with disabilities
- Lack of access to resources, such as schools, transportation, and other in-home or community resources, for persons with disabilities

Substandard Conditions

Based on the windshield survey, Via Iglesia neighborhood had more widespread issues throughout the community in comparison to the rest of the city.

Contributing Factors:

- Age of housing stock
- Cost of repairs or rehabilitation
- Lack of community revitalization strategies

SUMMARY OF FAIR HOUSING ISSUES AND ACTIONS FOR MITIGATION

The following table summarizes fair housing issues in Aliso Viejo and actions the City intends to take to address these issues.

AFH Identified Fair Housing Issues	Contributing Factors	City Actions
New Housing Options in High Opportunity Areas - Expand access to opportunity for protected classes	▪ Location and type of affordable housing ▪ Lack of access to opportunity due to high housing costs ▪ Lack of fair housing outreach and enforcement ▪ Availability of affordable housing ▪ Availability of affordable units in a range of sizes	▪ Identify sites in high opportunity areas for new housing development ▪ Explore policies and programs that increase the supply of affordable housing ▪ Through the Fair Housing Foundation, the City will conduct landlord education campaign to educate property owners about State law prohibiting discrimination based on household income ▪ Through the Fair Housing Foundation, the City will provide fair housing education and information to apartment managers and homeowner associations on why denial of reasonable modifications/accommodations is unlawful ▪ Through the Fair Housing Foundation, the City will conduct fair housing outreach to tenants, landlords, property owners, realtors, and property management companies
Protecting Existing Residents from Displacement	▪ Displacement of residents due to economic pressures ▪ Availability of affordable housing ▪ Availability of affordable units in a range of sizes	▪ Attend quarterly OCHA Housing Advisory Committee to enhance the exchange of information regarding the availability, procedures, and policies related to the Housing Assistance Voucher program and regional housing issues ▪ Provide five-year and annual PHA plan certifications

AFH Identified Fair Housing Issues	Contributing Factors	City Actions
Provide Access and Inclusion for Persons with Disabilities	▪ Lack of supportive services for persons with disabilities ▪ Lack of access to resources, such as schools, transportation, and other in-home or community resources, for persons with disabilities	Review and amend if necessary the City's Housing and Reasonable Accommodation regulations and procedures

Summary of HCD Comments and City Responses
City of Aliso Viejo
January 2022

HCD Comment (Letter of 10/18/2021)	Revised Draft Housing Element Page No.	Response/Revision
A. Review and revision	CP 49-55	The evaluation of the prior element has been revised to provide additional information regarding the appropriateness and effectiveness of goals, policies, and related actions in meeting the housing needs of special needs populations.
B.1 Affirmatively furthering fair housing	CP-91 to 127 H-21	The Community Profile has been revised to include a description of public outreach, an assessment of fair housing, identification and prioritization of contributing factors to fair housing issues and goals, and actions sufficient to overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity. In addition, Program 12 of the Housing Plan has been revised to describe actions the City will take to affirmatively further fair housing.
B.2 Extremely-low-income needs	CP-6/7 CP-29	The element has been revised to provide additional data regarding ELI needs. The draft Housing Element as submitted to HCD included projected ELI needs of 50% of the very-low RHNA; therefore, no further revisions are required.
B.3 Housing conditions	CP-16	The element has been revised to provide estimates of the number of housing units in need of rehabilitation or replacement.
B.3 Overpayment by Tenure	CP-6	The element has been revised to provide overpayment data by tenure and income category (Table CP-7).
B.3 Vacancy Rates and Housing Prices	CP-21	The draft Housing Element as submitted to HCD included vacancy rates by tenure (Table CP-19) and median home sales prices (Table CP-21). The element has been revised to provide typical rental rates.
B.4 Sites inventory	CP-63	Parcel listing. Table CP-34 has been expanded to provide additional data regarding candidate parcels for rezoning. In addition, Table CP-33 has been revised to clarify that the Towers PA is a site and not an approved project.
	CP-64	Map of sites. Attachment C-1 of the draft element as submitted to HCD included maps of the candidate sites for rezoning. The element has been revised to include a map showing the locations of the sites in the inventory.

HCD Comment (Letter of 10/18/2021)	Revised Draft Housing Element Page No.	Response/Revision
	CP-63	Aggregated sites. The element has been revised to list each parcel-by-parcel number or unique reference, parcel size, zoning, general plan designation, describe any existing uses for any nonvacant sites, and include a calculation of the realistic capacity of each parcel.
	CP-63	Realistic capacity. The element has been revised to include an estimate of the number of units that can be accommodated on each site in the inventory.
	CP-59 to 61	Nonvacant sites. The element has been revised to provide additional detail regarding the methodology used to determine the additional development potential within the planning period.
	CP-63	Large sites. The element has been revised to clarify that there are no parcels larger than 10 acres in the inventory.
	CP 48-49	Infrastructure. The element has been revised to include additional analysis regarding the adequacy of infrastructure to serve projected development.
	CP 46-47	Environmental constraints. The element has been revised to include additional analysis any known environmental constraints or other known conditions within the City that could impact housing development in the planning period.
	CP-59	ADUs. The analysis of potential ADU production has been revised to provide additional analysis of ADU production.
		Electronic Sites Inventory Form: Pursuant to Government Code section 65583.3, subdivision (b), the City will submit the HCD sites inventory form with the adopted Housing Element.
B.4 Sites with Zoning for a Variety of Housing Types	H-19 CP-43	Emergency Shelters: The element has been revised to clarify whether shelter are permitted without discretionary action and describe the development standards of the zones that allow emergency shelters by-right, the capacity of these zones to accommodate the identified housing need for emergency shelters, the applicability of any spacing requirements, typical parcel sizes, whether the sites are nonvacant, and the potential capacity for adaptive reuse. In addition, the analysis should provide an analysis of proximity to transportation and services for these sites, hazardous conditions, and any

HCD Comment (Letter of 10/18/2021)	Revised Draft Housing Element Page No.	Response/Revision
		conditions inappropriate for human habitability. In addition, Program 10 has been expanded to include an amendment to emergency shelter parking requirements consistent with AB 139.
	H-19 CP-40	Employee Housing: The element has been revised to note that there are no Aliso Viejo residents employed in agricultural occupations and agriculture is not a permitted use in any zoning district. Program 10 has been expanded to include a Zoning Code amendment consistent with the Employee Housing Act (Health and Safety Code Section 17021.5) to allow employee housing for six or fewer employees as a single-family structure and permitted in the same manner as other dwellings of the same type in the same zone. Since agriculture is not a permitted use anywhere in the city, Section 17021.6 is not applicable to Aliso Viejo.
	H-20 CP-39	Accessory Dwelling Units: Program 11 has been revised to ensure that City regulations continue to be consistent with current ADU law.
B.5 Governmental constraints	CP-59	Land use controls. As noted in the original draft element, the city is almost completely built-out and only one parcel has potential for residential development under current zoning (see Table CP-33). The element has been revised to provide additional analysis of land-use controls as potential constraints on a variety of housing types, including whether 100% residential developments are permitted.
	CP-45/46	Fees and exactions. The original draft element included a complete analysis of development fees and exactions. It should be noted that projects do not require a rezoning or variance if they are consistent with the zoning for the property.
	CP-45/46	Processing and Permit Procedures: The element has been revised to provide additional analysis regarding the City's permit processing times and approval procedures. In addition, the element has been revised to provide additional analysis of the approval findings for a Site Development Permit and the criteria for the Director to forward the application to the City Council, and processing and permit procedures' impacts as potential constraints on housing supply and affordability.

HCD Comment (Letter of 10/18/2021)	Revised Draft Housing Element Page No.	Response/Revision
	CP-29	Inclusionary Requirements: The element has been revised to provide additional clarification of inclusionary requirements.
	CP-46/47	Codes and Enforcement: The element has been revised to provide additional analysis regarding the City's building and zoning code enforcement processes and procedures, including any local amendments to the building code, and analyze their impact as potential constraints on housing supply and affordability.
	H-18/19	SB 35 streamlined review. Program 9 has been revised to include preparation of written procedures for the SB 35 Ministerial Approval Process.
	H-18/19	Zoning, Development Standards, and Fees: Program 9 has been revised in compliance with new transparency requirements for posting all zoning, development standards, and fees on the City's website.
	CP-41 to 44 H-19	Constraints on persons with disabilities. The element has been revised to include additional analysis of potential constraints on housing for persons with disabilities, as follows: *Reasonable Accommodations*: The element has been revised to describe reasonable accommodation procedures for providing exception in zoning and land use including typical findings for approval of a reasonable accommodation request. *Definition of Family*: The element has been revised to describe the zoning code definition of a family and analyze as a potential constraint on housing for persons with disabilities. *Residential Care Facilities*: The element has been revised to provide additional information regarding City regulations for residential care facilities. In addition, Program 10 has been revised to amend zoning regulations provide additional clarity in conformance with applicable law.
B.6 Nongovernmental constraints	CP-34	Land Prices and Cost of Construction: The element has been revised to include additional information regarding the price of land and cost of construction.

HCD Comment (Letter of 10/18/2021)	Revised Draft Housing Element Page No.	Response/Revision
	CP-46	Developed Densities and Permit Times: The element has been revised to provide additional analysis of requests to develop housing at densities below those anticipated in the sites inventory and the length of time between receiving approval for a housing development and submittal of an application for building permits.
B.7 Special housing needs	CP-9 to 13 CP 41 to 43 H-15 to 17 H-19	Persons with Disabilities: The original draft element included pre-approved SCAG data regarding the total number of Aliso Viejo residents with disabilities by type, as well as the number of seniors with disabilities by type. The element also includes analysis of the special housing needs of persons with disabilities and how the City's regulations and programs address these needs. Programs 4, 5 and 6 specifically describe City efforts to assist persons with special needs, and Program 10 has also been revised to address the needs of persons with disabilities.
	CP-14/15	Farmworkers: The element has been revised to provide additional data and analysis regarding farmworkers in the county as a whole.
C.1 Housing Programs	H-12 to 24	Programs have been revised to include a description of the City's specific role in implementation; definitive implementation timelines; objectives, quantified where appropriate; and identification of responsible agencies and officials.
C.2 Adequate sites	H-13/14	As noted in Program 1, the element includes a commitment to rezone adequate sites consistent with State law.
	CP-60	Accessory dwelling units. The element has been revised to reflect projected ADU production consistent with 2018-2020 ADU permit trends.
C.3 ELI and special needs households	H-14/15	As noted in Program 2 of the original draft element, "The priority for the use of in-lieu funds will be to assist the provision of extremely-low- and very-low-income rental housing, which may include purchasing affordability covenants on existing rental units and/or providing incentives to non-profit developers of rental housing." This program has been expanded to include special needs housing.
C.4 Removing constraints		Issues related to removing constraints are discussed above.

HCD Comment (Letter of 10/18/2021)	Revised Draft Housing Element Page No.	Response/Revision
C.5 Affirmatively furthering fair housing	CP-93 H-21	Additional analysis of AFFH issues is provided in Section C.7 and Program 12 has been expanded to include additional actions the City will take to further fair housing.
C.6 Accessory dwelling units	H-20	Program 11 has been added to include additional incentivizes to promote ADU development for very low-, low-, and moderate-income households.
D. Quantified objectives	H-25	Quantified objectives have been added for rehabilitation by income category.
E. Public Participation	Appendix C-6	The element has been revised to provide further description of opportunities for public review and how public comments have been addressed in the element.
F. Consistency with General Plan	H-2	The Housing Plan has been revised to describe how General Plan consistency will be maintained.
G. Housing in the Coastal Zone	CP-22	The element has been revised to provide information regarding housing in the Coastal Zone.

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT
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October 18, 2021

Omar Dadabhoy, Community Development Director
Planning Services
City of Aliso Viejo
12 Journey, Suite 100
Aliso Viejo, CA 92656

Dear Omar Dadabhoy:

RE: City of Aliso Viejo's 6th Cycle (2021-2029) Draft Housing Element

Thank you for submitting the City of Aliso Viejo's (City) draft housing element received for review on August 19, 2021. Pursuant to Government Code section 65585, subdivision (b), the California Department of Housing and Community Development (HCD) is reporting the results of its review. Our review was facilitated by a telephone conversation on October 7, 2021 with Rose Rivera, Senior Planner, and yourself. In addition, HCD considered comments from the Welcoming Neighbors Home Initiative pursuant to Government Code section 65585, subdivision (c).

The draft element addresses many statutory requirements; however, revisions will be necessary to comply with State Housing Element Law (Article 10.6 of the Gov. Code). The enclosed Appendix describes the revisions needed to comply with State Housing Element Law.

The City's statutory deadline to adopt a housing element was October 15, 2021. For your information, pursuant to Assembly Bill 1398 (Chapter 358, Statutes of 2021), if a local government fails to adopt a compliant housing element within 120 days of this statutory deadline, then any rezoning to accommodate the regional housing needs allocation (RHNA), including for lower-income households, shall be completed no later than one year from the statutory deadline. Otherwise, the local government's housing element will no longer comply with State Housing Element Law, and HCD may revoke its finding of substantial compliance pursuant to Government Code section 65585, subdivision (i).

For your information, some general plan element updates are triggered by housing element adoption. HCD reminds the City to consider timing provisions and welcomes the opportunity to provide assistance.

For information, please see the Technical Advisories issued by the Governor's Office of Planning and Research at: http://opr.ca.gov/docs/OPR_Appendix_C_final.pdf and http://opr.ca.gov/docs/Final_6.26.15.pdf.

Public participation in the development, adoption and implementation of the housing element is essential to effective housing planning. Throughout the housing element process, the City should continue to engage the community, including organizations that represent lower-income and special needs households, by making information regularly available and considering and incorporating comments where appropriate.

Several federal, state, and regional funding programs consider housing element compliance as an eligibility or ranking criteria. For example, the CalTrans Senate Bill (SB) 1 Sustainable Communities grant; the Strategic Growth Council and HCD's Affordable Housing and Sustainable Communities programs; and HCD's Permanent Local Housing Allocation consider housing element compliance and/or annual reporting requirements pursuant to Government Code section 65400. With a compliant housing element, the City will meet housing element requirements for these and other funding sources.

HCD appreciates the professionalism and dedication you and senior planner, Rose Rivera provided during our review. We are committed to assisting the City in addressing all statutory requirements of State Housing Element Law. If you have any questions or need additional technical assistance, please contact Marisa Prasse, of our staff, at Marisa.Prasse@hcd.ca.gov.

Sincerely,



Paul McDougall
Senior Program Manager

Enclosure

APPENDIX
CITY OF ALISO VIEJO

The following changes are necessary to bring the City's housing element into compliance with Article 10.6 of the Government Code. Accompanying each recommended change, we cite the supporting section of the Government Code.

Housing element technical assistance information is available on HCD's website at http://www.hcd.ca.gov/community-development/housing-element/housing-element-memos.shtml. Among other resources, the housing element section contains HCD's latest technical assistance tool, *Building Blocks for Effective Housing Elements (Building Blocks),* available at http://www.hcd.ca.gov/community-development/building-blocks/index.shtml and includes the Government Code addressing State Housing Element Law and other resources.

A. Review and Revision

Review the previous element to evaluate the appropriateness, effectiveness, and progress in implementation, and reflect the results of this review in the revised element. (Gov. Code, § 65588 (a) and (b).)

The review requirement is one of the most important features of the element update. The review of past programs should analyze the City's accomplishments over the previous planning period. This information provides the basis for developing a more effective housing program.

A thorough program-by-program review is necessary to evaluate City's performance in addressing housing goals. As part of this analysis, the element should describe the actual results of the prior element's programs, compare those results to the objectives projected or planned, and based on an evaluation of any differences between what was planned versus achieved, provide a description of how the objectives and programs of the updated element incorporate changes resulting from the evaluation. This information and analysis provides the basis for developing a more effective housing program. Examples of programs that need information and evaluation include, but are not limited, to the following:

Program 2 (Affordable Housing In-Lieu Funds) – Describe and evaluate the recommendations of the in-lieu fund study that were adopted and their appropriateness moving forward.

Program 3 (Homeownership Assistance Programs) – Evaluate how the interest list of potential buyers for 58 affordable, owner-occupied units is created, maintained, and how the list has changed over the planning period.

Program 5 (OCHA Special Needs Groups Rental Assistance Program) – Describe how many referrals were made during the planning period and if the City was able to expand this program during the planning period.

Program 6 (City Grants for Special Needs Groups) – Analyze what percent of the Human & Social Services community assistance budget was allocated to special needs groups in the other years during the planning period besides 2020.

Program 7 (Code Enforcement) – Address if the City was successful in identifying and funneling resources into home rehabilitation.

In addition, as part of the evaluation of programs in the past cycle, the element must provide an explanation of the effectiveness of goals, policies, and related actions in meeting the housing needs of special needs populations (e.g., elderly, persons with disabilities, large households, female headed households, farmworkers and persons experiencing homelessness). For more information, See HCD's Building Blocks at https://www.hcd.ca.gov/community-development/building-blocks/getting-started/review-revise.shtml.

B. Housing Needs, Resources, and Constraints

1. *Affirmatively further[ing] fair housing in accordance with Chapter 15 (commencing with Section 8899.50) of Division 1 of Title 2…shall include an assessment of fair housing in the jurisdiction. (Gov. Code, § 65583, subd. (c)(10)(A).)*

   General: The element has some basic information and maps on segregation and access to opportunity map scores. However, the element generally does not address most components of this requirement. The element, among other things, must include outreach relevant to affirmatively furthering fair housing (AFFH), a full assessment of fair housing, identification, and prioritization of contributing factors to fair housing issues and goals and actions sufficient to overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity, as detailed below. For more information, please visit https://www.hcd.ca.gov/community-development/affh/index.shtml.

   Enforcement and Outreach Capacity: The element must include the City's ability to provide enforcement and outreach capacity which can consist of actions such as the City's ability to investigate complaints, obtain remedies, or the City's ability to engage in fair housing testing. The element currently states that the City works with the Fair Housing Foundation to provide fair housing services. The analysis should describe what type of housing services are provided, as well as describe compliance with existing fair housing laws and regulations, analyze any patterns in fair housing complaints (using data such as HUD's FHEO Inquiries by City found on HCD's AFFH Data Viewer) and include a conclusion of summary of issues.

   Integration and Segregation: The element includes data on non-white population at the local level; however, it should also evaluate segregation by race/ethnicity, providing detail for each race/ethnicity. In addition, the element should analyze patterns and trends of segregation and integration, include a comparison of the City to the region, and consider other data options. In addition, this section must address trends and patterns locally and regionally within the City for disability, familial status,

and income (local to regional comparison). Finally, the element should include a summary of integration and segregation fair housing issues.

Racially/Ethnically Concentrated Areas of Poverty (R/ECAP): The element states that there aren't any R/ECAPs in the City. In addition, the City should analyze the racial concentrations as it relates to areas of affluence. The combination in the R/ECAP and areas of affluence analyses will help guide goals and actions to address fair housing issues. The analysis should evaluate the patterns and changes over time and consider other relevant factors, such as public participation, past policies, practices, and investments and demographic trends.

Access to Opportunity: The element includes some general data from the overall indicator of access to opportunity from the TCAC/HCD maps, but if should analyze this data for differences across geographies, trends, other relevant factors and incorporate local data and knowledge. In addition, a complete analysis should include the local and regional disparities of the educational, environmental, and economic scores individually through local, federal, and/or state data.

Disproportionate Housing Needs, Including Displacement: The element does include some information on overcrowded households, substandard housing conditions, homelessness, and cost-burdened households, but it must also analyze the data including evaluating spatial trends, patterns, and other local knowledge, and conclude with a summary of issues. In addition, the element must include an analysis of displacement risk and must still provide data, analysis, and conclusions. One resource for the displacement analysis is the Urban Displacement Project's Gentrification and Displacement maps: https://www.urbandisplacement.org/los-angeles/los-angeles-gentrification-and-displacement.

Local Data and Knowledge and Other Relevant Factors: The element does not address this requirement. The element must include local data, knowledge, and other relevant factors to discuss and analyze any unique attributes about the City related to fair housing issues. The element should complement federal, state, and regional data with local data and knowledge where appropriate to capture emerging trends and issues, including utilizing knowledge from local and regional advocates and service providers. Also, the element must include other relevant factors that contribute to fair housing issues in the jurisdiction. The element should analyze historical land use and investment practices or other information and demographic trends.

Contributing Factors: The element must list and prioritize contributing factors to fair housing issues. The element is missing this requirement. Contributing factors create, contribute to, perpetuate, or increase the severity of fair housing issues and are fundamental to adequate goals and actions. Examples include community opposition to affordable housing, housing discrimination, land use and zoning laws, lack of regional cooperation, location and type or lack of affordable housing and lack of public or private investment in areas of opportunity or affordable housing choices. The analysis shall result in strategic approaches to inform and connect goals and actions to mitigate contributing factors to affordable housing.

Site Inventory: The element does not address the requirement for sites to AFFH. The analysis must address the components of the assessment of fair housing (e.g., segregation & integration, access to opportunity, R/ECAPs, disproportionate housing needs including displacement). In addition, the analysis should address the number of anticipated units by income group and how the sites identified improve conditions (or if sites exacerbate conditions, how a program can mitigate the impact), whether the sites are isolated by income group, and should be supported by local data and knowledge.

Goals, Priorities, Metrics, and Milestones: Based on the outcomes of a complete analysis, the element must be revised to add or modify goals and actions. Goals and actions must specifically respond to the analysis and to the identified and prioritized contributing factors to fair housing issues and must be significant and meaningful enough to overcome identified patterns and trends. Actions must have metrics and milestones as appropriate and should address housing mobility enhancement, new housing choices and affordability in high opportunity areas, place-based strategies for community preservation and revitalization and displacement protection. Given the history and nature of development patterns in the City, the element could focus on programs that enhance housing mobility and encourage development of more housing choices and affordable housing throughout the community. Given that most of the City is considered a high and highest resource community, the element should focus on programs that enhance housing mobility and encourage new opportunities throughout the community. For more information, please see HCD's guidance at https://www.hcd.ca.gov/community-development/affh/index.shtm.

2. *Include an analysis of population and employment trends and documentation of projections and a quantification of the locality's existing and projected needs for all income levels, including extremely low-income households. (Gov. Code, § 65583, subd. (a)(1).)*

   Extremely Low-income Households (ELI): The element must quantify existing and projected ELI households and analyze their housing needs. The analysis should consider tenure, cost burden, overcrowding and other household characteristics then examine trends and the availability of resources to determine the magnitude of gaps in housing needs. The housing need for projected ELI households can be calculated by using available census data to determine the number of very low-income households that qualify as ELI households or presume that 50 percent of very low-income households qualify as ELI households. For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/housing-needs/extremely-low-income-housing-needs.shtml.

3. *Include an analysis and documentation of household characteristics, including level of payment compared to ability to pay, housing characteristics, including overcrowding, and housing stock condition. (Gov. Code, § 65583, subd. (a)(2).)*

   Housing Conditions: The element identifies the age of the housing stock. However, it must estimate the number of units in need of rehabilitation and replacement. For example, the analysis could include estimates from a recent windshield survey or

sampling, estimates from the code enforcement agency, or information from knowledgeable builders/developers/property managers, including non-profit housing developers or organizations.

For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/housing-needs/housing-stock-characteristics.shtml.

Overpayment by Tenure: While the element identifies the total number of overpaying households, it must quantify and analyze the number of overpaying households by tenure (i.e., renter and owner) and the lower-income households paying more than 30 percent of their income on housing by tenure. For additional information and sample analysis, see the *Building Blocks* at http://www.hcd.ca.gov/community-development/housing-element/housing-element-memos.shtml.

Vacancy Rates and Housing Prices: The element should include a description and analysis of current housing stock characteristics. This information can be used to assist jurisdictions in identifying specific housing needs and tailoring housing programs to fit those needs. The element should identify and analyze the vacancy rates by tenure. In addition, the element must identify and analyze typical housing prices for rental and for-sale units.

4. *An inventory of land suitable and available for residential development, including vacant sites and sites having realistic and demonstrated potential for redevelopment during the planning period to meet the locality's housing need for a designated income level, and an analysis of the relationship of zoning and public facilities and services to these sites. (Gov. Code, § 65583, subd. (a)(3).)*

   Parcel Listing: The element must list sites, including candidate sites for rezoning, by parcel number or unique reference, parcel size, zoning, general plan designation, describing existing uses for any nonvacant sites and include a calculation of the realistic capacity of each site. The element should detail the capacity of each site (a range is unacceptable) and identify the affordability of units for each site. A description of existing uses should be sufficiently detailed to facilitate an analysis of the potential for additional development. For additional information and sample sites inventory, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/inventory-of-land-suitable.shtml.

   In addition, Table CP-25 lists the Towers Planning Area, including 7 deed restricted units for very low-income households. The element should clearly describe whether this area is a project or site. If a site, the element should include all the information described above. If a project, the element must demonstrate affordability for the units anticipated to be affordable to low- and moderate-income households.

   Map of Sites: The element must include a general map of identified sites. The map and the identified sites should be clearly legible. For additional information, see the sites inventory analysis section of the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/inventory-of-land-suitable.shtml.

Aggregated Sites: Many sites listed in the sites inventory appear to be comprised of multiple parcels. While the element may aggregate parcels, it must also list each parcel-by-parcel number or unique reference, parcel size, zoning, general plan designation, describe any existing uses for any nonvacant sites, and include a calculation of the realistic capacity of each parcel. For additional information and sample sites inventory, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/inventory-of-land-suitable.shtml.

Realistic Capacity: The element must include an estimate of the number of units that can be accommodated on each site in the inventory. The estimate may rely on established minimum density standards or include analysis demonstrating how the number of units for each site was determined. (Gov. Code, § 65583.2, subd. (c).) The estimate of the number of units for each site must be adjusted as necessary, based on the land-use controls and site improvements, typical densities of existing or approved residential developments at a similar affordability level in that jurisdiction, and on the current or planned availability and accessibility of sufficient water, sewer, and dry utilities. The element should describe the methodology used for calculating realistic capacity and should provide support for those assumptions. For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/analysis-of-sites-and-zoning.shtml#zoning.

For sites zoned for nonresidential uses (e.g. commercial and mixed-use zones), the element must describe how the estimated number of residential units for each site was determined. The estimate may rely on established minimum density standards or include analysis demonstrating how the number of units for each site was determined. (Gov. Code, § 65583.2, subd. (c).) The estimate must also account for land-use controls such as allowing 100 percent nonresidential uses. To demonstrate the likelihood for residential development in nonresidential zones, the element could describe any performance standards mandating a specified portion of residential and any factors increasing the potential for residential development such as incentives for residential use, and residential development trends in the same nonresidential zoning districts. For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/analysis-of-sites-and-zoning.shtml#zoning.

Nonvacant Sites: While the element identifies nonvacant sites to accommodate the regional housing need for lower-income households, the description provided regarding potential for redevelopment is inadequate. The element must further describe the methodology used to determine the additional development potential within the planning period. The methodology shall consider factors including the extent to which existing uses may constitute an impediment to additional residential development, the City's or County's past experience with converting existing uses to higher density residential development, the current market demand for the existing use, an analysis of any existing leases or other contracts that would perpetuate the existing use or prevent redevelopment of the site for additional residential development, development trends, market conditions, and regulatory or other

incentives or standards to encourage additional residential development on these sites. (Gov. Code, § 65583.2, subd. (g).)

For additional information and sample analysis, see the Building Blocks at: http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/analysis-of-sites-and-zoning.shtml#analysis.

In addition, the housing element relies upon nonvacant sites to accommodate more than 50 percent of the Regional Housing Needs Allocation (RHNA) for lower-income households. For your information, the housing element must demonstrate existing uses are not an impediment to additional residential development and will likely discontinue in the planning period. (Gov. Code, § 65583.2, subd. (g)(2).) Absent findings (e.g., adoption resolution) based on substantial evidence, the existing uses will be presumed to impede additional residential development and will not be utilized toward demonstrating adequate sites to accommodate the RHNA.

Large Sites: Sites larger than ten acres in size are deemed inadequate to accommodate housing for lower-income households unless it is demonstrated, with sufficient evidence, that sites are suitable to accommodate housing for lower-income households. One of the sites to accommodate the City's housing need for lower-income household is a large parcel (The Commons at 21 acres). Since most developments utilizing state or federal financial resources include 50 to 150 units, the element must include analysis describing the feasibility of large parcel development of housing affordable to lower-income households. For example, the analysis could describe opportunities for specific-plan development and further subdivision or other methods to facilitate the development of housing affordable to lower-income households on large sites. For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/analysis-of-sites-and-zoning.shtml#realistic.

Infrastructure: The element must demonstrate sufficient existing or planned water, sewer, and other dry utilities supply capacity, including the availability and access to distribution facilities to accommodate the City's regional housing need for the planning period. (Gov. Code, § 65583.2, subd. (b).) The element should describe whether each site already has infrastructure and utility access. For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/analysis-of-sites-and-zoning.shtml#environmental.

Environmental Constraints: While the element generally describes a few environmental conditions within the City, it must describe any known environmental constraints or other known conditions within the City that could impact housing development in the planning period. (Gov. Code, § 65583.2, subd. (b).) For example, the element should analyze very high fire hazard severity zone risks and if any sites identified in the site inventory are subject to these environmental constraints. For additional information and sample analysis, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/site-inventory-analysis/analysis-of-sites-and-zoning.shtml#environmental.

Accessory Dwelling Units (ADU): The element estimates an ADU potential for the planning period of 40 units without providing any justification for these estimates. Specifically, in addition to other methods, HCD accepts the use of trends in ADU construction since January 2018 to estimate new production. The City should provide data on the number of ADUs permitted each year in recent years to justify these 40 anticipated ADUs during the planning period. Depending on the analysis, the element must commit to monitor ADU production throughout the course of the planning period and implement additional actions if not meeting target numbers anticipated in the housing element. In addition to monitoring production, this program should also monitor affordability. Additional actions, if necessary, should be taken in a timely manner (e.g., within 6 months). Finally, if necessary, the degree of additional actions should be in stride with the degree of the gap in production and affordability. For example, if actual production and affordability of ADUs is far from anticipated trends, then rezoning or something similar would be an appropriate action. If actual production and affordability is near anticipated trends, then measures like outreach and marketing might be more appropriate.

Electronic Sites Inventory Form: Pursuant to Government Code section 65583.3, subdivision (b), the City must utilize standards, forms, and definitions adopted by HCD when preparing the sites inventory. Please see HCD's housing element webpage at https://www.hcd.ca.gov/community-development/housing-element/index.shtml for a copy of the form and instructions. The City can reach out to HCD at sitesinventory@hcd.ca.gov for technical assistance. Please note, upon adoption of the housing element, the City must submit an electronic version of the sites inventory with its adopted housing element to sitesinventory@hcd.ca.gov.

Sites with Zoning for a Variety of Housing Types:

- *Emergency Shelters*: The element should clarify whether shelter are permitted without discretionary action and describe the development standards of the zones that allow emergency shelters by-right, the capacity of these zones to accommodate the identified housing need for emergency shelters, the applicability of any spacing requirements, typical parcel sizes, whether the sites are nonvacant, and the potential capacity for adaptive reuse. In addition, the analysis should provide an analysis of proximity to transportation and services for these sites, hazardous conditions, and any conditions inappropriate for human habitability. Lastly, the element states that the City requires 0.3 parking spaces per bed, however this is not consistent with new emergency shelter parking requirements under AB 139 (Chapter 335, Statues of 2019). The element must include a program to adjust emergency shelter parking requirements to comply with this requirement.
- *Employee Housing*: The element must demonstrate zoning is consistent with the Employee Housing Act (Health and Safety Code, § 17000 et seq.) or include programs as appropriate. Section 17021.5 requires employee housing for six or fewer employees to be treated as a single family structure and permitted in the same manner as other dwellings of the same type in the same zone. Section 17021.6 requires employee housing consisting of no more than 12 units or 36

beds to be permitted in the same manner as other agricultural uses in the same zone.

- *Accessory Dwelling Units (ADUs):* The element indicates the City modifies its zoning code to ease barriers to the development of ADU's. In addition, after a cursory review of the City's ordinance, HCD discovered several areas which were not consistent with State ADU Law. This includes, but is not limited to, lot coverage requirements, bedroom restrictions, deed restrictions, permitting requirements, Junior Accessory Dwelling Unit (JADU) requirements, and owner-occupancy requirements. In addition, ADUs need to be allowed in any residential zone, yet under the current code, they are not allowed in RH & RVH zones. HCD will provide a complete listing of ADU non-compliance issues under a separate cover. As a result, the element should add a program to update the City's ADU and zoning ordinances to comply with state law. For more information, please consult HCD's ADU Guidebook, published in December 2020, which provides detailed information on new state ADU requirements.

5. *An analysis of potential and actual governmental constraints upon the maintenance, improvement, or development of housing for all income levels, including the types of housing identified in paragraph (1) of subdivision (c), and for persons with disabilities as identified in the analysis pursuant to paragraph (7), including land use controls, building codes and their enforcement, site improvements, fees and other exactions required of developers, and local processing and permit procedures… (Gov. Code, § 65583, subd. (a)(5).)*

   Land Use Controls: The element must identify and analyze all relevant land-use controls impacts as potential constraints on a variety of housing types (e.g., multifamily rental housing, mobilehomes, transitional housing). The analysis must also evaluate the cumulative impacts of land-use controls on the cost and supply of housing, including the ability to achieve maximum densities and cost and supply of housing. The analysis could also describe past or current efforts to remove identified governmental constraints. Examples include, but are not limited to, whether 100 percent residential developments are allowed in mixed-use areas, CBO overlay requirements, open area and landscaping requirements, and parking standards for studio and one-bedroom apartments (number of spaces and garage requirement). The element should include programs to address or remove the identified constraints. In particular, the element should include a program to revise parking standards to be more in line with standards found on HCD's website: https://www.hcd.ca.gov/community-development/building-blocks/constraints/land-use-controls.shtml.

   Fees and Exaction: The element must describe all required fees for single-family and multifamily housing development, including planning fees (e.g., conditional use permits (CUP), rezones, and variances) and analyze their impact as potential constraints on housing supply and affordability. For additional information and a sample analysis and tables, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/constraints/fees-and-exactions.shtml.

Processing and Permit Procedures: While the element describes the permit procedure at a general level, it must describe and analyze the City's permit processing times and approval procedures by zone and housing type (e.g., multifamily rental housing, mobilehomes, housing for agricultural employees, supportive housing). In addition, the element should analyze the approval findings for a Site Development Permit and the criteria for the Director to forward the application to the City Council. The analysis must evaluate the processing and permit procedures' impacts as potential constraints on housing supply and affordability. For example, the analysis should consider processing and approval procedures and time for typical single- and multi-family developments, including type of permit, level of review, approval findings and any discretionary approval procedures. For additional information and sample analysis, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/constraints/processing-permitting-procedures.shtml.

Inclusionary Requirements: The element must describe and analyze the inclusionary housing requirements and their impacts as potential constraints on the development of housing for all income levels, specifically on housing supply and affordability. The analysis must evaluate the inclusionary policy's implementation framework, including levels of mandated affordability and the types of options and incentives offered to encourage and facilitate compliance with the inclusionary requirements. The City could engage the development community to facilitate this analysis. For additional information and sample analysis, see the Building Blocks on HCD's website and HCD's letter regarding inclusionary housing ordinances at https://www.hcd.ca.gov/community-development/housing-element/housing-element-memos/docs/ab_1505_final.pdf.

Codes and Enforcement: The element must describe the City's building and zoning code enforcement processes and procedures, including any local amendments to the building code, and analyze their impact as potential constraints on housing supply and affordability. For additional information and a sample analysis, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/constraints/codes-and-enforcement-on-offsite-improvement-standards.shtml.

Streamlined Ministerial Approval Permit Procedures: The element should describe the City's SB 35 (Chapter 366, Statutes of 2017) streamlined ministerial approval procedure and application and include programs if appropriate.

Zoning, Development Standards, and Fees: The element must clarify its compliance with new transparency requirements for posting all zoning, development standards, and fees on the City's website and include programs if appropriate.

Constraints on Housing for Persons with Disabilities: The element must include a description and analysis of potential constraints on housing for persons with disabilities, as follows:

- *Reasonable Accommodations*: The element must demonstrate the City has a reasonable accommodation procedure for providing exception in zoning and land use and should describe and evaluate the typical findings for a reasonable accommodation request.

- *Definition of Family*: The element should describe any zoning code definition of a family and analyze as a potential constraint on housing for persons with disabilities.
- *Residential Care Facilities for Seven or More Persons*: The element is unclear on how and where residential care facilities for seven or more persons are permitted. The element should analyze requirements for these types of housing, and if they do require a CUP or are excluded from residential zones, specifically analyze these constraints for impacts on housing choices, approval certainty and objectivity for housing for persons with disabilities and include programs as appropriate.
- *Residential Care Facilities with Six or Fewer Persons*: The element should provide an analysis of potential constraints associated with the City's definitions of residential care facilities. On page CP-38, the element contains different definitions for 'residential care facilities', 'health facilities', and 'alcohol or drug abuse recovery or treatment facilities that are licensed by the State for up to six persons. However, the state does not license all community care facilities or group homes serving six or fewer persons. The element should describe where these definitions are found in municipal code, provide clarification on these definitions and include a program to address any constraints on housing for persons with disabilities. In addition, residential care facilities should be allowed in any zone where similar types are also allowed, yet Table CP-29 shows that these types of facilities are not permitted in the RH and RVH zones. The element should include a program to revise these standards that relate to residential care and other similar facilities.

6. *An analysis of potential and actual nongovernmental constraints upon the maintenance, improvement, or development of housing for all income levels, including the availability of financing, the price of land, the cost of construction, the requests to develop housing at densities below those anticipated in the analysis required by subdivision (c) of Government Code section 65583.2, and the length of time between receiving approval for a housing development and submittal of an application for building permits for that housing development that hinder the construction of a locality's share of the regional housing need in accordance with Government Code section 65584. The analysis shall also demonstrate local efforts to remove nongovernmental constraints that create a gap between the locality's planning for the development of housing for all income levels and the construction of that housing. (Gov. Code, § 65583, subd. (a)(6).)*

   Land Prices and Cost of Construction: The element must be revised to include analysis of the price of land and cost of construction.

   Developed Densities and Permit Times: The element must analyze requests to develop housing at densities below those anticipated in the sites inventory and the length of time between receiving approval for a housing development and submittal of an application for building permits. The analysis must address any hinderances on the construction of a locality's share of the regional housing need.

7. *Analyze any special housing needs such as elderly; persons with disabilities,*

including a developmental disability; large families; farmworkers; families with female heads of households; and families and persons in need of emergency shelter. (Gov. Code, § 65583, subd. (a)(7).)

The element includes some general quantification; however, the element should include analysis of households with special housing needs. The analysis should include, but is not limited to, factors such as trends, household income, tenure, housing types, zoning, and available resources. In addition:

- *Persons with Disabilities*: While the element provided information on residents with different types of disabilities, the element must quantify the total number of persons with disabilities and analyze their special housing needs.
- *Farmworkers:* The element indicates there are no farmworkers employed in fulltime farming occupations in Aliso Viejo. However, farmworkers from the broader area and those employed seasonally may have housing needs, including within the City's boundaries. As a result, the element should at least acknowledge the housing needs of permanent and seasonal farmworkers at a county-level (e.g., using USDA county-level farmworker data) and include programs as appropriate.

C. Housing Programs

1. *Include a program which sets forth a schedule of actions during the planning period, each with a timeline for implementation, which may recognize that certain programs are ongoing, such that there will be beneficial impacts of the programs within the planning period, that the local government is undertaking or intends to undertake to implement the policies and achieve the goals and objectives of the housing element through the administration of land use and development controls, the provision of regulatory concessions and incentives, and the utilization of appropriate federal and state financing and subsidy programs when available. The program shall include an identification of the agencies and officials responsible for the implementation of the various actions. (Gov. Code, § 65583, subd. (c).)*

   To address the program requirements of Government Code section 65583, subdivision (c)(1-6), and to facilitate implementation, programs should include: (1) a description of the City's specific role in implementation; (2) definitive implementation timelines; (3) objectives, quantified where appropriate; and (4) identification of responsible agencies and officials. Programs to be revised with specific commitment and definitive implementation timelines include but are not limited to 1 (Adequate Sites for New Housing), 2 (Facilitate the Provision of Affordable Housing), 3 (Homeownership Assistance Programs), and 7 (Code Enforcement).

   In addition, programs to be revised with specific commitment and quantifiable outcomes include, but are not limited to, the following:

   - *Program 2 (Facilitate the Provision of Affordable Housing)* – Provide quantifiable outcome of how many units will be assisted in the 6th cycle.

- *Program 3 (Homeownership Assistance Programs)* – Commit to how the City will make homeownership programs available.
- *Program 4 (Section 8 Housing Choice Vouchers)* – Provide quantifiable outcomes regarding how much the program will expand voucher usage in the City.
- *Program 5 (OCHA Special Needs Groups Rental Assistance Program)* – Provide quantifiable outcomes regarding how many more households with special needs will be included in the expansion of the program.
- *Program 7 (Code Enforcement)* – Provide quantifiable outcomes, describe how funds typically become available to assist with home rehabilitation and how the City will proactively pursue those funds.
- *Program 9 (Streamlined Residential Permit Processing)* – Provide quantifiable outcomes describing how much the program will reduce permit processing time and how many affordable housing development projects will be assisted.
- *Program 12 (Encourage Energy Conservation)* – Provide quantifiable outcomes describing how many projects will be assisted by this program.

Lastly, as noted in Finding A, the element does not include a complete Review and Revision analysis. Based on the results of a complete Review & Revisions analysis, many of the programs carried over from the 5th Cycle element should be updated with further actions to ensure appropriateness and efficacy of the programs moving forward. Potential programs for revision include but are not limited to Programs 3 (Homeownership Assistance Programs), 4 (Section 8 Housing Choice Vouchers), 5 (OCHA Special Needs Groups Rental Assistance Program), 6 (City Grants for Special Needs Groups), and 7 (Code Enforcement).

2. *Identify actions that will be taken to make sites available during the planning period with appropriate zoning and development standards and with services and facilities to accommodate that portion of the city's or county's share of the regional housing need for each income level that could not be accommodated on sites identified in the inventory completed pursuant to paragraph (3) of subdivision (a) without rezoning, and to comply with the requirements of Government Code section 65584.09. Sites shall be identified as needed to facilitate and encourage the development of a variety of types of housing for all income levels, including multifamily rental housing, factory-built housing, mobilehomes, housing for agricultural employees, supportive housing, single-room occupancy units, emergency shelters, and transitional housing. (*Gov. Code, § *65583, subd. (c)(1).)*

   As noted in the Finding B4, the element does not include a complete sites inventory or analysis; as a result, the adequacy of sites and zoning has not been established. Based on the results of a complete sites inventory and analysis, programs may need to be added, or revised, to address a shortfall of sites and zoning for a variety of housing types.

   If the element does not identify adequate sites to accommodate the regional housing need for lower-income households, it must include a program(s) to identify sites with appropriate zoning to accommodate the regional housing need within the planning period. (Gov. Code, § 65583.2, subd. (h) and (i).)

The program must commit to:

- permit owner-occupied and rental multifamily uses by-right for developments in which 20 percent or more of the units are affordable to lower-income households. By-right means local government review must not require a CUP, planned unit development permit, or other discretionary review or approval;
- accommodate a minimum of 16 units per site;
- require a minimum density of 20 units per acre; and
- at least 50 percent of the lower-income need must be accommodated on sites designated for residential use only or on sites zoned for mixed uses that accommodate all of the very low and low-income housing need, if those sites:
    - allow 100 percent residential use, and
    - require residential use occupy 50 percent of the total floor area of a mixed-use project.

For additional information, see the Building Blocks' at http://www.hcd.ca.gov/community-development/building-blocks/program-requirements/identify-adequate-sites.shtml.

Accessory Dwelling Units (ADUs): The element assumes 40 ADU and or JADU over the planning period. The element must add a program to monitor ADU production throughout the course of the planning period and commit to implement additional actions if not meeting target numbers anticipated in the housing element. In addition to monitoring production, this program should also monitor affordability. Additional actions, if necessary, should be taken in a timely manner (e.g., within 6 months). Finally, if necessary, the degree of additional actions should be in stride with the degree of the gap in production and affordability. For example, if actual production and affordability of ADUs is far from anticipated trends, then rezoning or something similar would be an appropriate action. If actual production and affordability is near anticipated trends, then measures like outreach and marketing might be more appropriate.

3. *The housing element shall contain programs which assist in the development of adequate housing to meet the needs of extremely low-, very low-, low- and moderate-income households. (Gov. Code, § 65583, subd. (c)(2).)*

ELI and Special Needs Households and Individuals: While the element includes Program 2 (Facilitate the Provision of Affordable Housing), the element must include a program(s) to assist in the development of housing affordable to ELI households. Programs must be revised or added to the element to assist in the development of housing for ELI households. In addition, the element should include specific actions to address the housing needs of special needs households. Program actions could include prioritizing some funding for housing developments affordable to ELI households or households with special needs and offering financial incentives or regulatory concessions to encourage the development of housing types, such as multifamily, single-room occupancy (SRO) units, to address the identified housing needs for ELI households. For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/housing-needs/extremely-low-income-housing-needs.shtml.

4. *Address and, where appropriate and legally possible, remove governmental and nongovernmental constraints to the maintenance, improvement, and development of housing, including housing for all income levels and housing for persons with disabilities. The program shall remove constraints to, and provide reasonable accommodations for housing designed for, intended for occupancy by, or with supportive services for, persons with disabilities. (Gov. Code, § 65583, subd. (c)(3).)*

   As noted in Findings B5 and B6, the element requires a complete analysis of potential governmental and nongovernmental constraints. Depending upon the results of that analysis, the City may need to revise or add programs and address and remove or mitigate any identified constraints.

5. *Promote AFFH opportunities and promote housing throughout the community or communities for all persons regardless of race, religion, sex, marital status, ancestry, national origin, color, familial status, or disability, and other characteristics protected by the California Fair Employment and Housing Act (Part 2.8 (commencing with Section 12900) of Division 3 of Title 2), Section 65008, and any other state and federal fair housing and planning law. (Gov. Code, § 65583, subd. (c)(5).)*

   As noted in Finding B1, the element must include a complete analysis of AFFH. Based on the outcomes of that analysis, the element must add or modify programs to have specific commitment, milestones, and metrics to overcome fair housing issues and to enhance housing mobility strategies, encourage development of new affordable housing in high resource areas, improve place-based strategies, and protect residents from displacement.

6. *Develop a plan that incentivizes and promotes the creation of accessory dwelling units that can be offered at affordable rent, as defined in Section 50053 of the Health and Safety Code, for very low, low-, or moderate-income households. For purposes of this paragraph, "accessory dwelling units" has the same meaning as "accessory dwelling unit" as defined in paragraph (4) of subdivision (i) of Section 65852.2. (Gov. Code, § 65583, subd. (c)(7).)*

   The element is required to include a program that incentivizes or promotes ADU development for very low-, low-, and moderate-income households. Examples of actions include flexible zoning requirements, development standards, or processing and fee incentives that facilitate the creation of ADUs, such as reduced parking requirements, fee waivers and more. Other strategies could include targeted advertising of ADU development opportunities or establishing an ADU specialist within the planning department. In addition, as described in Finding B4, a program should be added to update the City's ADU ordinance to comply with state law.

D. Quantified Objectives

Establish the number of housing units, by income level, that can be constructed, rehabilitated, and conserved over a five-year time frame. (Gov. Code, § 65583, subd. (b)(1 & 2).)

While the element includes quantified objectives for construction and conservation, it must also include quantified objectives for rehabilitation by income group.

E. Public Participation

Local governments shall make a diligent effort to achieve public participation of all economic segments of the community in the development of the housing element, and the element shall describe this effort. (Gov. Code, § 65583, subd.(c)(8).)

While the element includes a general summary of the public participation process, it must also demonstrate diligent efforts were made to involve all economic segments of the community in the development of the housing element. The element could describe the efforts to engage in conversations with low- and moderate-income households and organizations that represent them and to involve such groups and persons in the element throughout the process. While the City made effort to include the public through City Council meetings, moving forward, the City should employ additional methods for public outreach efforts, particularly including lower-income and special needs households, language accessibility at meetings, and providing alternative formats and venues for public input besides City Council meetings. For example, the City could conduct targeted stakeholder interviews or establish a committee representative of lower-income and special needs households in future public outreach efforts. In addition, the element should also summarize the public comments and describe how they were considered and incorporated into the element. For additional information, see the Building Blocks at http://www.hcd.ca.gov/community-development/building-blocks/getting-started/public-participation.shtml.

In addition, based on a follow-up email in response to a question asked during our review call with City staff, HCD understands the City made the element available to the public only one week before its submittal to HCD. By not providing adequate time for the public to review and comment on a draft of the element in advance of submission, the City has not yet complied with statutory mandates to make a diligent effort to encourage the public participation in the development of the element and it reduces HCD's ability to consider public comments in its review. The availability of the document to the public and opportunity for public comment at least two weeks prior to submittal to HCD is essential to the public process and HCD's review. The City must proactively make future revisions available to the public, including any commenters, prior to submitting any revisions to HCD and diligently consider and address comments, including revising the document where appropriate. HCD's future review will consider the extent to which the revised element documents how the City solicited, considered, and addressed public comments in the element. The City's consideration of public comments must not be limited by HCD's findings in this review letter.

F. Consistency with General Plan

The housing element shall describe the means by which consistency will be achieved with other general plan elements and community goals. (Gov. Code, § 65583, subd. (c)(7).)

While the element discusses how internal consistency within the general plan was achieved as part of the update of the housing element, it must also describe how consistency with the general plan is maintained. In addition, The City should consider an internal consistency review as part of its annual general plan implementation report required under Government Code section 65400.

G. Housing in the Coastal Zone

Coastal localities shall document the number of low- and moderate-income units converted or demolished, and the number of replacement units provided. (Gov. Code, § 65588, subd. (d).)

If necessary, to determine whether the City's affordable housing stock in the coastal zone is being protected and provided as required by Government Code section 65588, the element must be revised to include the following:

1. The number of new housing units approved for construction within the coastal zone since January 1982;

2. The number of housing units for persons and families of low- and moderate-income required to be provided in new housing developments either within the coastal zone or within three miles;

3. The number of existing residential dwelling units occupied by low- and moderate-income households either within the coastal zone or three miles of the coastal zone that have been authorized to be demolished or converted since January 1982 and

4. The number of residential dwelling units for low- and moderate-income households that have been required for replacement.

THE Kennedy COMMISSION

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November 29, 2021

Ms. Marisa Prasse, Housing Policy Analyst
California Department of Housing & Community Development
2020 West El Camino Avenue
Sacramento, CA 95833

RE: Initial Comments to Draft Housing Element dated August 2021

Department of Housing and Community Development:

Thank you for the opportunity to review and comment on the City of Aliso Viejo's 2021-2029 initial draft Housing Element. We have reviewed the draft and are submitting this letter to provide public comments.

The Kennedy Commission (the Commission) is a broad-based coalition of residents and community organizations that advocates for the production of homes affordable for families earning less than $27,000 annually in Orange County. Formed in 2001, the Commission has been successful in partnering and working with Orange County jurisdictions to create effective housing and land-use policies that have led to the new construction of homes affordable to lower-income working families.

Public Engagement

Public engagement is a necessary component of the Housing Element process. As California Housing Element law states: "The local government shall make a diligent effort to achieve public participation of all economic segments of the community in the development of the housing element..."[1]Broad participation and true engagement of the public increase the likelihood that the community members involved in the discussion and planning processes will support new housing strategies and housing developments. Public engagement should include participation from residents of diverse communities, housing consumers, service providers, and advocates.

The City conducted two community workshops, and one survey, but did not provide alternative options or outreach for lower income residents to participate in the Housing Element process. This does not constitute adequate community engagements. The City should have hosted additional meetings intended to exclusively engage residents.The City did not provide information on how many of those participants were residents of Aliso Viejo, and, specifically, low-income residents. The summary does not provide the number of respondents surveyed. The City needs to engage community stakeholders and residents in the evaluation and creation of policies, goals, programs and sites for affordable housing development, especially low income and special needs residents who are the most vulnerable to the housing crisis and document these efforts.

[1] Gov. Code, § 65583, subd. (c)(9)

Moreover, the City does not provide a description of the respondents so it is unclear how many residents were from lower income communities. The City needs to properly engage community stakeholders and residents in the evaluation and creation of policies, goals, programs and sites for affordable housing development, especially low income and special needs residents who are the most vulnerable to the housing crisis and document these efforts.

In addition, the availability of the document to the public and opportunity for public comment prior to submission to HCD is essential to the public process. However, the City did not provide sufficient opportunity for the public to review the Housing Element draft. The updated draft was discussed to the public on August 18th, 2021, only one day before it was submitted to HCD for review on August 19, 2021. The city should proactively make future revisions available to the public, including any commenters, prior to submitting any revisions to HCD and diligently consider and address comments, including making revisions to the document where appropriate.

Community Needs

According to SCAG's pre-certified housing data, there are a total of 7,373 renter households in Aliso Viejo, with 52% of those households spending thirty percent or more of gross income on housing costs.[2] Additionally, 25% renter households are extremely rent burdened and are paying fifty percent or more of gross income on housing costs. Furthermore, 12% of renters are in the extremely low income category[3]. The median average income for the city is $128,050[4]. In light of these figures it is not surprising that the low and extremely low income cannot afford housing. The Housing Element draft states a resident needs to earn an annual income of the moderate level ,respectively, to afford for-sale housing[5].

Employment:

At least two of the four primary employment sectors in the City provide a median salary that is below the City's median income and that HCD defines as very low income: Education and Social Services, and retail. According to Table CP-3 of the draft, these sectors account for approximately 23% of jobs in the City[6]. The City should take into account its local economy and offer healthy and affordable housing options that the current market-rate housing development is not offering. The City could improve its analysis by describing employment trends by industry and how changes either recent or anticipated can affect the housing market and discuss opportunities for improving work-housing balance, such as mixed-use to facilitate housing near jobs.

Cost Burden and Overcrowding:

The Housing Element must "include an analysis and documentation of household characteristics, including level of payment compared to ability to pay, housing characteristics, including overcrowding, and housing stock condition." [7]While the element includes some information on

[2] SCAG Pre-certified Housing Data for the City of Aliso Viejo, p. 14 April 2021.
[3] SCAG Pre-certified Housing Data for the City of Aliso Viejo, p. 14 April 2021.
[4] City of Aliso Viejo 2021-2029 Draft Housing Element, p.CP-19, August 2021
[5] City of Aliso Viejo 2021-2029 Draft Housing Element, p.CP-19, August 2021.
[6] City of Aliso Viejo 2021-2029 Draft Housing Element, p.CP-3, August 2021
[7] Gov. Code, § 65583, subd. (a)(2)

housing stock conditions from American Community Survey (ACS) data, it must also estimate the number of units in need of replacement and rehabilitation. For example, the analysis could include estimates from a recent windshield survey or sampling, estimates from the code enforcement agency, or information from knowledgeable builders/developers, including non-profit housing developers or organizations.

5th Cycle RHNA Performance

During the current 5th cycle planning period the City had a total Regional Housing Needs Assessment (RHNA) of 39: 9 at very low-income, 7 at low-income, 7 at moderate and 16 at above moderate.

To date, the City has approved 386 units at moderate and 35 at above moderate.[8] At very-low income the City has approved 83 very low income units and 335 at low-income. Although the City has exceeded 5th Cycle targets for all income levels,the last year any housing permits were granted was in 2017. In a later section, the Kennedy Commission provides recommendations of policies the City can implement to increase its production of housing at the very low- and low-income levels.

5th Cycle Identified Opportunity Sites:

In the 5th Cycle, the City identified housing opportunity sites for very low and low income exclusively in the SP No. 1 – Vantis and SP No. 2 - Commons zones. Vacant lands on Liberty 4 and 2C Liberty were also identified to accommodate at least 249 lower-income units.The sites were identified based primarily on the minimum density requirement for affordable housing of 30 units to the acre. No affordable housing policy accompanied these higher density allowances, as is evident in the deficit of lower income housing in the City's 5th Cycle. The higher density zoning has provided significant incentives for market rate multi-family development at the expense of curtailing affordable housing options on these higher density sites. As analyzed, higher density incentives and sites (30+du/acre) identified are not producing affordable housing units and circumvents the efforts of the State density bonus law to include affordable housing in exchange for development incentives and increases in density that are being given away. Since developers receive all the incentives and density increases by-right, they do not need to include affordable housing in their projects. This clearly shows the need for strong affordable housing policies, such as an Inclusionary Housing Ordinance that can ensure that at least a 15% affordable housing requirement for lower-income households is set on sites identified for the 6th Cycle Housing Element (6th Cycle).

Although the City met its regional housing needs, the City is encouraged to implement an inclusionary housing ordinance to facilitate the development of affordable housing. We recommend that the ordinance include a 15% requirement of affordable housing production at extremely low, very low- and low-income categories.. Without strong affordability requirements, the SP No. 1 – Vantis and SP No. 2 - Commons zoning circumvents the efforts of the State density bonus law to

[8] Aliso Viejo 2020 Housing Element Annual Progress Report, Table B

include affordable housing in exchange for development incentives and increases in density because these sites provide market-rate developers the densities they need by-right.

Housing Policies to Increase Affordable Housing

Past Performance:

The City must "review the previous element to evaluate the appropriateness, effectiveness, and progress in implementation, and reflect the results of this review in the revised element." While the element includes a program-by-program review of implementation in the prior planning period, the review of past programs should also analyze the cumulative effectiveness of programs on addressing special housing needs over the previous planning period.

Incentivizing Affordable Housing in the 6th Cycle Housing Element:

To ensure that affordable housing is incentivized on the sites identified in the 6th Cycle, the City needs to include policies and programs that will create affordable housing. The following policies and programs proposed in the 6th Cycle can be improved in the following ways:

- **Program 1: Adequate Sites for Affordable Housing-** Can reduce the cost of development for projects by assuming the cost of amending the General Plan and Zoning designations to allow for additional residential development. Given the urgent need of residents for low-income housing, we propose the study be completed within one year of the adoption of the 6th Cycle Housing Element. The Commission strongly recommends the City adopt an Inclusionary Housing Ordinance within the first year after adoption to ensure that identified sites are truly feasible and effectively provide affordable housing in a balanced manner. We recommend that the ordinance include a 15% requirement of affordable housing production at extremely low, very low- and low-income categories and that it apply to all residential projects. The Inclusionary Housing Ordinance should be implemented no later than one years from the adoption of the Housing Element.
- **Program 2: Facilitate the Provision of Affordable Housing-** Affordable Housing In-Lieu Funds- The city should continue to prioritize In-Lieu to create new affordable rental units to extremely low and very low income households.
- **Program 8: Conservation of Existing and Future Affordable Units-** The city did not receive any notifications in the year 2020 about potential unit conversions. The city should include incentives that would make more units available for conversion to affordable units.

Housing Element Opportunity Sites Inventory

As part of the analysis of adequate sites, the City has reviewed potential housing sites citywide and has identified opportunity sites for lower-income households in The Commons at Aliso Viejo Town Center – Towers Planning Area. The City does not currently have sufficient residential sites to accommodate for the RHNA,but to accommodate for the shortfall the City is relying on Program 1 Adequate Sites for New Housing and the Rezoning candidate parcels in table CP-26 of the 6th cycle. The sites identified for lower-income categories are identified based on default densities for lower income units. As evident from the City's lack of affordable housing production in the 5th Cycle, relying solely on default densities without implementing specific affordable housing policies

will not produce affordable housing. Instead, it gives market-rate projects increased densities and land use incentives without incentivizing the inclusion of affordable units.

The Commission also strongly recommends that the City adopt an Affordable Housing Overlay that requires 15% of units be set aside for housing at the extremely-low,very low- and low-income level in the identified sites at The Commons at Aliso Viejo Town Center-Towers Planning Area. The Affordable Housing Overlay should be implemented no later than one year after the adoption of the 6th Cycle Housing Element.

One of the affordable housing incentives proposed through this program is an affordable housing density bonus compliant with State law. The density bonus should aim to maximize affordable housing production in exchange for development incentive. By simply allowing higher density on the housing sites identified for the 6th Cycle the City would be allowing developers to circumvent the efforts of the State density bonus law. This is even more important on sites where rezones or the overlays create higher densities at a range of 45 to 60 units to the acre, because developers will be getting the density increases by-right and not use density bonus and incentives because they will already be getting these by-right through the zone change and overlay. This will ensure that identified sites are truly feasible and effectively provide affordable housing in a balanced manner.

Suitability of Nonvacant Sites:

The City selected The Commons at Aliso Viejo Town Center – Towers Planning Area as the sites that will accomodate the most lower income housing units for the upcoming 6th Cycle. These sites are reused from the 5th Cycle. The City has failed to provide evidence of the actions they are taking to increase the probability these sites will be developed. The Commons has no inclusionary policy. We highly recommend the City implement an By-Right Affordable Housing Development policy in The Commons that requires that at least 20% of units in all residential projects be set aside for extremely low, very-low, low income housing in exchange for incentives and concessions that these rezonings will create for market rate development.

Traditional Funding for Affordable Housing:
In addition, identified affordable housing sites should also be evaluated for their viability to compete for traditional funding to create affordable housing. These funding sources prioritize development sites that promote access to community resources and services, such as schools, public transportation, medical services and access to parks.

No Net Loss:
The City will also have to consider No Net Loss when it identifies opportunity sites. It is crucial that affordable housing moves along with market-rate housing given the limited sites that are available. Considering the state's No Net Loss requirements, if the sites identified for affordable housing are developed for market-rate housing, the City will have to rezone new sites for the appropriate density.[9]

[9] Government Code § 65863

It is important that the City address the concerns we raised with the 6th Cycle Housing Element site inventory and further evaluate constraints to and the likelihood of the development of affordable housing on these sites. Moreover, the City needs to identify affordable housing policies and programs that will equitably facilitate and incorporate affordable housing at the extremely low, very low and low-income categories on these sites.

ADUs

The Commission questions the affordability of the 40 ADU units the City anticipates for the 6th Cycle. The City is assuming that 27 ADU units will be at the very low and low income level. However, the City does not provide strong enough policies that will ensure these ADU units will be affordable at the lower income levels. The City needs to propose a better plan to ensure the affordability of ADUs.

Affirmatively Furthering Fair Housing

The Housing Element has some basic information on demographics and overall scores for access to opportunity. However, the element generally does not address AFFH. The Housing Element needs to include outreach, an assessment of fair housing, identification, and prioritization of contributing factors to fair housing issues and goals and actions sufficient to overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity. The element includes some data on racial characteristics at the local level and mentions that it is similar to that of the surrounding areas; however, the comparison of segregation at local and regional levels must include more thorough analysis of local knowledge and history that can explain patterns and trends in the city and in surrounding areas. The analysis should include patterns and trends by race and ethnicity, not just the percentage of non-white population in the city as shown in Figure CP-1. The City has failed to provide a thorough analysis of risk of displacement, gentrification, and exclusivity in the City or policies that address these issues. The City has also not provided adequate recommendations on how the City will address contributing factors to fair housing issues in the City.

Additionally, the City does not provide anti-displacement policies that adequately protect current residents. As the SCAG Aliso Viejo 2020 Data shows, a substantial portion of the City is considered low-income and susceptible to displacement, experiencing advanced gentrification, or at-risk of becoming exclusive. Of the 526 low income units in the jurisdiction, 100% of these assisted units are at-risk of converting to market rate within the next year[10]. Providing housing that is affordable to low income residents also helps address concentration of poverty by helping rent-burdened residents. As established, the City has not provided policies that will effectively produce housing at the lower income levels.

As a reminder, AFFH requires the following:

- An assessment of Fair Housing in Aliso Viejo including a summary of issues and analysis of patterns, and trends
- The preparation, adoption, and implementation of a housing element requires a diligent effort to include all economic segments of the community.

[10] SCAG Pre-certified Housing Data for the City of Aliso Viejo, p. 18 April 2021

- Identification and prioritization of fair housing contributing factors
- Investment in low resource areas that will improve quality of living in those areas
- Programs with a schedule of actions with timelines and specific commitment to have a "beneficial impact" within the planning period to achieve the goals and objectives of addressing contributing factors to Fair housing issues.[11]

We ask that the City prioritize the housing needs of low, very low and extremely low-income residents, who encounter difficulties in finding decent, affordable housing.

As the City moves forward with the draft Housing Element update, the Commission urges the City to support the development of affordable homes. The Commission has provided the following recommendations for the City to incorporate:

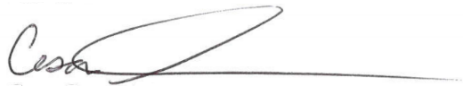
1. Adopt an Inclusionary Housing Ordinance that sets a 15% requirement of affordable housing production at extremely low, very low, and low-income categories of all residential projects. In Program 1, The City must identify a timeframe to study the policy and a timeframe for adoption and implementation. We recommend that this be done in the first year of the 6th Cycle.
2. Implement an Affordable Housing Overlay, especially in areas being identified for new residential development. The Affordable Housing Overlay should set aside 15% of all units at the extremely low, very low-, and low-income levels. The City must identify a timeframe to study the policy and a timeframe for adoption and implementation. We recommend that this happens in the first year of the 6th Cycle.
3. Identify City-owned sites and prioritize these sites for the development of housing exclusively at the extremely low, very low- and low-income level.
4. Prioritize affordable housing funding and programs to increase affordable housing options for families of lower incomes, especially at very low and extremely low-income.
5. Ensure that development sites being identified and discussed in the Housing Element draft are realistic and available during the planning period.
6. The City of Aliso Viejo should provide an adequate analysis and recommendations on how the City will Affirmatively Further Fair Housing. For example, the City should include anti-displacement policies that protect low-income residents from rising rents and commit to reinvesting in low resource areas to improve the quality of living of residents in those areas.
7. The City needs to prioritize and expand affordable housing in new opportunity sites identified in the Housing Element inventory, where density and incentives will only promote market rate housing.
8. The city should describe in more detail how the In Lieu Fee Program will work with the proposed new opportunity sites to increase affordable housing opportunities.
9. The City must update its local Density Bonus to comply with recent State Density Bonus amendments. In updating the Density Bonus the City must consider its impact and effectiveness in promoting affordable housing development in the city initiated upzoning,

[11] Gov. Code, § 65583, subd. (c)(10)(A)

specific plans, general plan update areas and land use rezonings that give away higher development density, incentives and concessions without requiring the affordable units.

Thank you for taking the time to review the Commission's comments. If you have any questions, please feel free to contact me at (949) 250-0909 or cesarc@kennedycommission.org.

Sincerely,



Cesar Covarrubias
Executive Director



November 27, 2021

Regarding: Aliso Viejo 2021-2029 Housing Element Draft

Dear Mayor Ackley, Mayor Pro Tem Chun, Councilmembers Harrington, Hurt and Munzing,

We write representing the Welcoming Neighbors Home (WNH) Initiative, a ministry of Tapestry Unitarian Universalist Congregation – which has members in South Orange County – including Aliso Viejo. The WNH initiative works to end homelessness and promote the development of more affordable housing – especially for those with extremely low and very low incomes.

We have reviewed Aliso Vejo's 2021-2029 Housing Element Draft and discussed it with Mr. Omar Dadabhoy, the city's Community Development Director. We offer the following comments and questions.

But first, a request. **We ask that any future revisions to the Housing Element Draft be posted with redlined tracked changes** so we may easily monitor changes to the document.

Past Performance:

Though the 5th Cycle RHNA goals for Aliso Viejo were quite low, 9 Very Low Income (VLI) and 7 Low Income (LI), **we were pleased to see the goals were exceeded**.

- Total Permits were issued for 83 Very Low Income units, 74 extra permits issued.
- Total Permits were issued for 335 Low Income units, 328 extra permits issued.

We note from the 2013-2021 Housing Element and the Aliso Viejo Annual Progress Report for 2019, p.13, Table B that 3 of the projected properties were used to produce units for very-low-income (VLI) and low-income (LI) income families/individuals.

- Vantis Multi-Family Apartments – Projected: 20 LI units, permits issued: 20 LI Units
- The Commons at AV Town Center – Projected: 7 VLI & 14 LI Units
- 4 Liberty – Projected: 144 VLI & LI units, permits issued: none
- 2C Liberty – Projected: 144 VLI & LI Units, permits issued: 33 VLI & 167 LI Units

That said, there were 534 moderate-income housing units built compared to 34 lower-income units – a ratio of 15 to 1. **We would like to see an even more balanced approached to development in the 6th Cycle.** We are especially interested in the city offering more lower-income family rentals (3 and 4 bedroom apartments.)

Comments Regarding Site Inventory:

We request a copy of the site inventory so we can analyze the planned affordability in the proposed sites for re-zoning.

We visited the sites listed as candidates for re-zoning (see Appendix for photos). In general **we see a lot of potential in the sites proposed**. While all of the sites have existing structures, several of the sites are unoccupied.

Rather than taking 3 years to re-zone the sites**, we urge the city to re-zone them within 1 year of the 6th Cycle Housing Element being adopted.**

We also **urge the city to rigorously pursue affordable housing developers**, such as Jamboree, National CORE or others, and **reduce constraints to incentivize them build affordable housing units in Aliso Viejo** so the city can meet its 6th Cycle RHNA goals of 574 lower-income units.

1. We are especially excited about The Commons – where formerly Lowe's was located. It is conveniently located near Trader Joe's and other shopping. It is a huge property – but of course there are existing structures there. Does this site already have a housing overlay with affordable housing requirements? If so, could you please elaborate on the requirements and what exactly is planned for this area?
2. The Aliso Viejo Town Center is promising with its large parking lot. Again, does this site have an existing housing overlay and what are the affordable housing requirements?
3. For the Business Park on Aliso Viejo Parkway, we note there is a "Space Available" sign outside. This property seems to encompass 3 very large buildings and a huge parking lot, but we can't tell what the potential is. How much space is available? Does the owner want to redevelop the property into housing? How long are the leases that are now in place? We think this would be a wonderful location for the city to encourage a partnership between the owner and affordable and permanent supportive housing developers such as Jamboree and National CORE to apply for Project HomeKey funding.
4. We note there is a "Space Available" sign outside 35 Journey and 41 Columbia. Again, please share your analysis of the potential here.
5. For 1 Columbia we did not see a "Space Available" sign outside. What is your analysis of this site? Why do you think it has potential to be re-developed?

6. We were interested to hear that there is vacant land by Liberty and that TransWestern already has an application to build there. We think that would have been a terrific location for permanent supportive housing since it would have been close to behavioral health providers.

Comments regarding Proposed Housing Programs:

1. **ADUs** – We note the projection of 40 ADUs to meet the RHNA goals. **We would like to see more details on the plan to monitor to development and affordability of ADUs -** including, as other cities have done, a plan to track ADU rents to measure if progress is being made on the production of affordable units. In addition, we would like to see more incentives put in place to encourage the development of ADUs – such as expedited review of ADU permits, pre-approved ADU design plans and reduction of permit fees for deed restricted affordable ADUs.

2. **Program 4: Section 8 Housing Choice Vouchers** - We ask that the City **be more specific and robust in their plans for educating residents** about the Federal Housing Choice Voucher rental assistance program. We especially **urge the city to do outreach to landlords to encourage them to accept housing vouchers** because we are hearing that even when people are approved for the vouchers, they cannot find landlords who will accept them. **We also recommend that the City coordinate with United Way to bring informational sessions about their Welcome Home OC program to Aliso Viejo landlords.** This program is a landlord incentive program that provides financial incentives such as double security deposits, sign-on bonus, holding fees, and other assurances for landlords who rent units in Orange County to individuals, Veterans, and families with a housing voucher. The program is a joint effort between the United to End Homelessness initiative, Orange County United Way, Public Housing Authorities, and rental property owners to reduce the time involved in the search for housing by increasing the availability of rental units.

Although the city has achieved a degree of success in encouraging affordable housing, given that all the proposed sites have buildings on them, we think that a much more robust set of programs are needed to affirmatively attract developers to build lower income housing in Aliso Viejo.

RECOMMENDED HOUSING PROGRAMS:

We have consulted with staff at the Kennedy Commission to learn what housing programs facilitate the production of affordable housing. Below is their advice. We are in agreement with their recommendations.

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The Kennedy Commission recommends the following affordable housing policies and programs to provide development incentives and collaborative opportunities for the production of affordable homes:

1. **Inclusionary Housing Ordinance** - Given the urgent need of residents for low-income housing, the Commission strongly recommends the City adopt an Inclusionary Housing Ordinance within the next year to ensure that identified sites are truly feasible and effectively provide affordable housing in a balanced manner. We recommend that the ordinance include a 15% **requirement** of affordable housing production at extremely-low-, very-low- and low-income categories and that it apply to all residential projects. The ordinance should be flexible to allow for the development of affordable housing onsite, off site, or provide for an appropriate in-lieu fee option. We recommend an in-lieu fee option in the range of $10,000 to $15,000 per unit, or $10 to $15 per square foot, to go along with this policy. The in-lieu fee must be calculated to achieve the gap financing needed to create affordable housing and be used to leverage additional state and federal housing funds. We recommend the affordable units be deed restricted for at least 55 years. A feasibility study and implementation of the ordinance should be completed no later than one year from the adoption of the Housing Element.

2. **Mixed-Use Zoning** – We support the city's planning for mixed-use developments that provide residential units along major corridors and can provide significant opportunities for affordable housing development. We understand that mixed-use zoning allows for the integration of housing with other uses on underutilized commercial or industrial sites while retaining existing commercial/industrial square footage usage to provide services to new residents and the surrounding community. We recommend that the City require 15% of housing to be affordable at the extremely-low-, very-low-, and low-income levels in the mixed-use zoned focus areas.

3. **Affordable Housing Overlay** – The Commission recommends that the City adopt an Affordable Housing Overlay, especially over the mixed-use focus areas that are being rezoned and upzoned. A minimum of 15% of all units should be set aside for extremely low-, very low-, and low-income levels in exchange for

development and regulatory incentives. The City must identify a timeframe to study the policy and a timeframe for adoption and implementation. We recommend that this happen in the first year of the 6th Cycle as part of the Zoning Code update.

4. **Congregational Housing Overlay** - A Congregational Housing Overlay Zone provides an opportunity for the development of affordable housing on religious sites while retaining the existing religious use. The overlay would provide 100% affordable units on congregational sites, with a focus on extremely-low-, very-low- and low-income categories. Click here for a survey of how other cities are using congregational zoning.

5. **Adaptive Reuse Ordinance** - Certain building, fire code, and parking requirements add additional costs to building conversion projects and reduce the likelihood of developers converting commercial buildings to residential. The City should consider the adoption of an Adaptive Reuse Ordinance, such as Santa Ana's ordinance, to provide alternative building and fire standards for the conversion of eligible buildings in exchange for 15% of converted units dedicated to extremely low-, very low- and low-income categories.

6. **Community Land Trust** - The City should consider developing a Community Land Trust that would allow the City to retain ownership of land (either donated or purchased) and lease the land to the owner of the improvements for community benefit and the creation of 100% affordable housing.

7. **Density Bonus** - The City should analyze the effectiveness of the City's density bonus ordinance to develop affordable housing for lower-income households. The City's 5th cycle RHNA progress demonstrates that moderate and above moderate-income housing production has outpaced lower-income housing development by a 15 to 1 ratio. The City should prioritize affordable housing for lower-income households in its update and implementation of density bonuses. The review should include analysis as to how the density bonus is being implemented. This is especially important when analyzing its effectiveness in higher density specific plans and rezonings that give density and land use incentives and parking reductions, similar to the density bonus, but without requiring affordable housing. It is worth noting that rental developments can only use density bonuses to incentivize lower-income units.

8. **Incentivizing 100% Affordable Housing** - Regulatory, zoning and administrative requirements can contribute to high construction costs, and negatively affect the feasibility of producing affordable housing. The City should develop a program that incentivizes 100% affordable developments and reevaluate the current

zoning code to eliminate barriers and create incentives for affordable housing developments. Incentives could include reducing or eliminating permitting fees, offering additional by-right incentives beyond density bonus, reducing parking standards, and alternative development standards. The City should consult with for-profit and nonprofit developers to determine appropriate regulatory incentives.

9. **City Owned Sites and Surplus Property** - The city should prioritize city owned sites and surplus land to be developed exclusively for 100% affordable housing for low, very low and extremely low income families. The City must be proactive and implement a program that markets available surplus land to affordable housing developers.

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The need for more affordable housing for those earning less than $50,000 per year, especially families, is acute. We urge the city to take proactive steps, such as those outlined above, to promote the production of more affordable family housing in Aliso Viejo.

We also recommend that the city issue an RFP to actively solicit affordable housing developers to the city. We would like to see the city offer support from the fund of collected in-lieu fees in exchange for development of extremely-low-, very-low and low-income housing units as well as funding available from the State of California's HomeKey funds (https://homekey.hcd.ca.gov/sites/default/files/2021-09/NOFA_Homekey_0.pdf), and the federal government American Rescue Plan Act funds.

The Project Homekey deadline is January 31st. There is a source of funding, the Permanent Local Housing Allocation (PLHA), that will be available in 2022. This PLHA funding is readily available to cites but only if they apply for it. Is our city tracking these program deadlines to bring these resources to our community? Are we aware of all funding opportunities? It is important for the city to take advantage of these funding sources NOW to make important strides in the provision of affordable housing.

Thank you for your time and consideration of our comments and questions. We look forward to hearing from Mr. Dadabhoy regarding the answers to our questions and to getting a copy of the site inventory. Please contact Rona Henry at rona.s.henry@gmail.com and Catherine Van Camp at cvc4joy@gmail.com for questions, and to provide the information requested.

Sincerely,

Rona Henry, Chair
Welcoming Neighbors Home

Catherine Van Camp, Member
Welcoming Neighbors Home

Paul Bonfanti
Aliso Viejo Resident

Dana Freeman
Aliso Viejo Resident

Rev. Kent Doss, Minister
Tapestry, a Unitarian Universalist Congregation

Cc: Omar Dadabhoy, Community Development Director
David Doyle, Aliso Viejo City Manager
Cesar Covarrubias, Mildred Perez, Cythia Guerra and Daisy Cruz - Kennedy Commission
Paul McDougall, Marisa Prasse - California State Housing and Community Development Office

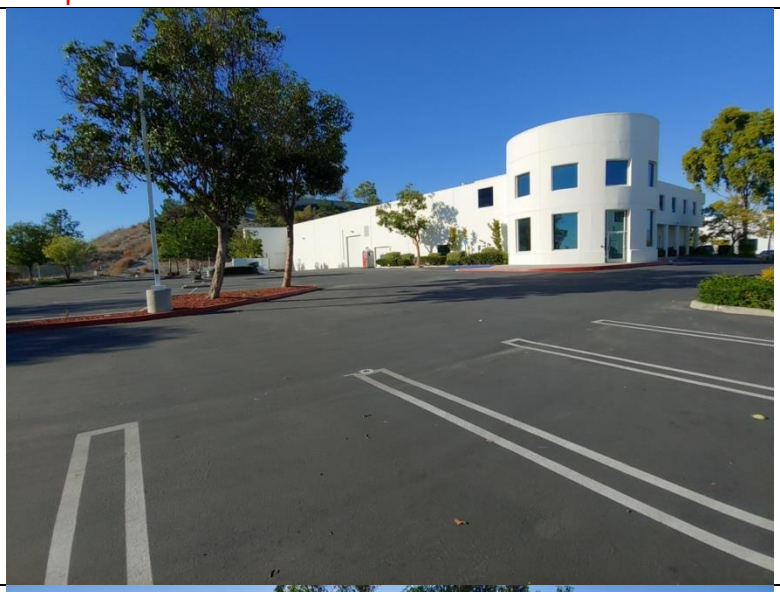
APPENDIX

Sites in the Aliso Viejo Housing Element Draft Fall 2021

Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
1 Columbia	Business Park	BP-2	Office	2	60-100

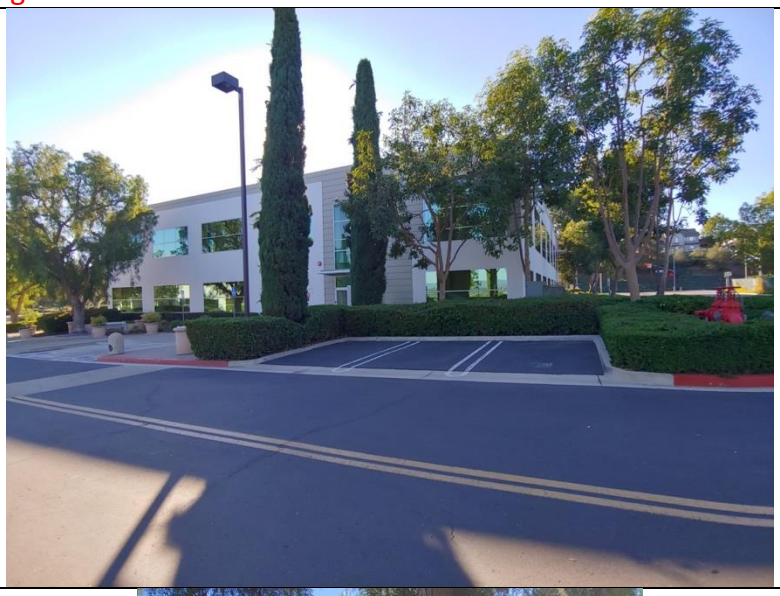




Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
41 Columbia	Business Park	BP-2	Office	2	60-100
Appears to be unoccupied. Next to Rt 73					
					
					

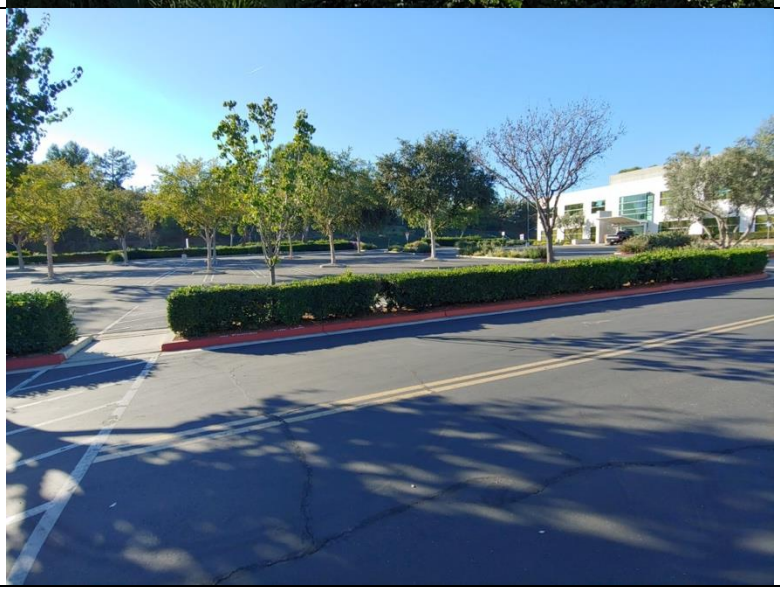
Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
26800 Aliso Viejo Pkwy	Business Park	BP-1	Office	7	210-350

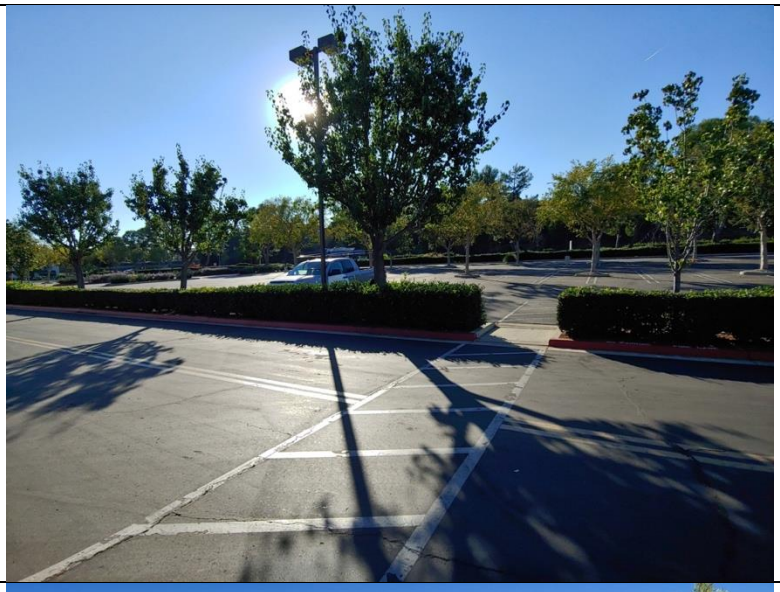
Space Available sign outside



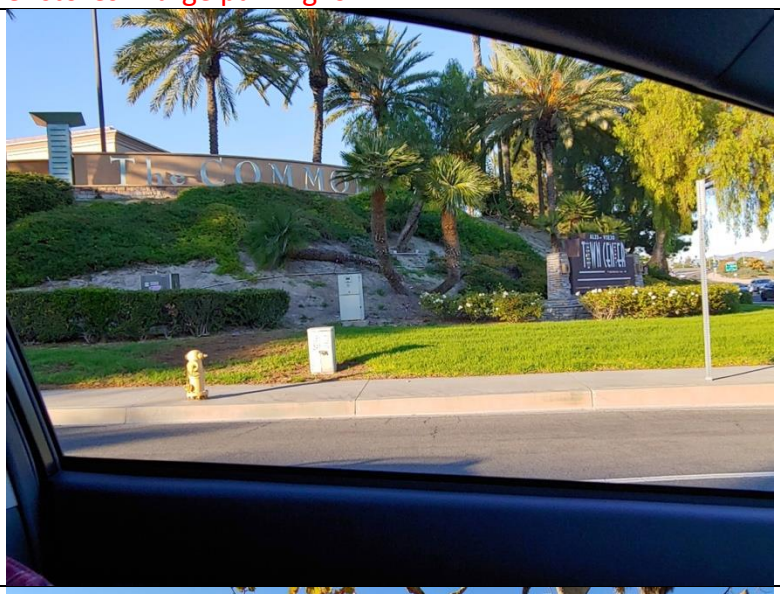


Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
26840 Aliso Viejo Pkwy	Business Park	BP-1	Office	7	210-350
Space Available sign outside.					
					
					

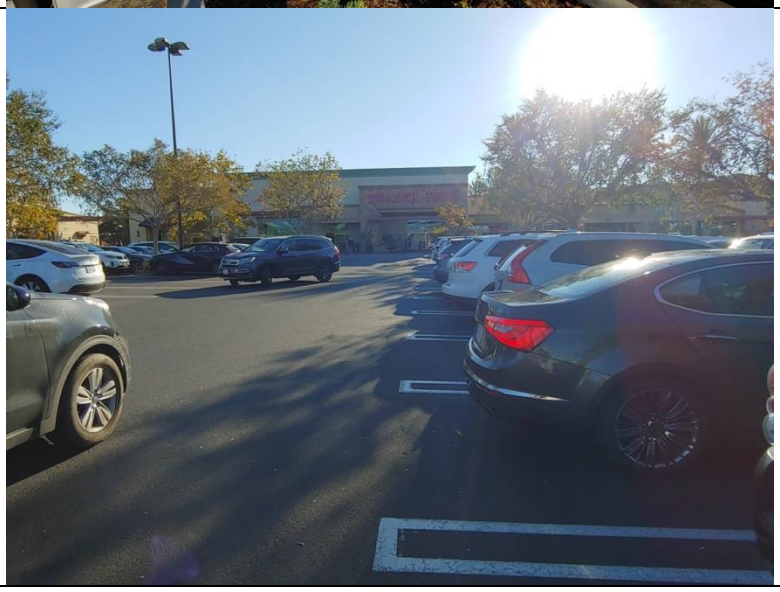
Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
26880 Aliso Veijo Pkwy	Business Park	BP-1	Office	7	210-350
Space Available sign outside.					
					
					

Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
26800 to 26880 Aliso Viejo Pkwy	Business Park	BP-1	Office	7	210-350
Large Parking Lot					
					
					

Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
35 Journey	Business Park	BP-1	Office	2	60-100
Space Available sign outside.					
					

Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
The Commons	High Density Residential/ Community Commercial	SP-2	Parking Lot	21	630-1,050
Site of Former Lowe's store – large space available. Site of Trader Joe's, Walgreens, Michaels, Taco Bell and other stores. Large parking lo					
					
					


TACO BELL




TRADER JOE'S

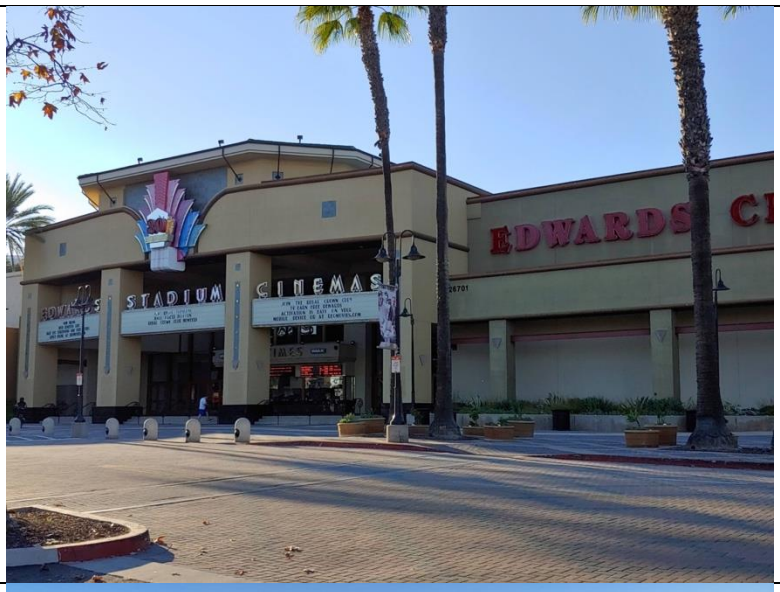





FISH DISTRICT



Site	Existing General Plan	Existing Zoning	Existing Uses	Acreage	Potential Units
AVTC Gateway	Business Park	CT	Parking Lot	6	300
Site of Edwards Regal Theater – large parking lot					
					
					


EDWARDS
STADIUM
CINEMAS





December 22, 2021

Ms. Prasse
Housing Policy Analyst
Land-Use and Planning Unit, Housing Policy Division
California Housing and Community Development
2020 W. El Camino Avenue, Suite 375
Sacramento, CA 95833

RE: Comments to Revised Draft Housing Element dated August 2021

California Department of Housing and Community Development:

My name is Amir Baum and I am a proud resident of the City of Aliso Viejo of seven years.

As an environmental health and safety professional, I have seen firsthand how lack of affordable housing in our city has led to a huge increase in homelessness and lack of housing security for thousands of residents. Many of these people are like you and me who once lived in secure homes but due to circumstances largely out of their control were forced to live on the street due to their wages not being able to keep up with ever increasing costs of living in Orange County.

While I have not personally faced housing insecurity, I have friends and colleagues in the Orange County area who certainly have, including in the South Orange County area. Ensuring we have a stable affordable housing supply not only ensures that these people I have known personally who lived throughout the Southern California region have dignity and respect they deserve to be able to have a decent job, wages, and have a roof over their hoods where they can sleep every night.

Securing affordable housing for our region has been shown to significantly reduce greenhouse gas emissions because those who need affordable housing would live closer to their jobs thereby improving air quality & protecting public health and our children's health. We need much more investment in place for affordable housing in order to revitalize the City of Aliso Viejo from the pandemic to provide critical assistance to thousands of people dealing with housing insecurity.

I am writing today to ask that you ensure the City of Aliso Viejo includes in their 6th Cycle Housing Element policies and programs that will effectively produce affordable housing at the extremely low-, very low-, and low-income level.

For the 2014-2021 planning period, the City had a Regional Housing Needs Assessment (RHNA) of 9 very low- and 7 low-income units. To date, the City has built 83 of the 9 very low-income units and 335 of the 7 low- income units. With a new RHNA of 390 at the very low- and 214 units at the low-income affordability levels, the City should continue to support the

production of affordable housing in the new cycle to meet the growing needs of hard working residents.

Of Aliso Viejo's 7,373 renter households, 3,860 (52.4%) spend thirty percent or more of gross income on housing costs. Additionally, 1,809 renter households in Aliso Viejo (24.5%) spend fifty percent or more of gross income on housing costs. Tables “Employment by Industry” and “Employment by Occupation” in the element shows a significant portion of job salaries in Aliso Viejo employment industries fall into the lower-income categories. The City should take into account its local economy and offer healthy and affordable housing options that the current market-rate housing development is not offering families and young professionals in Aliso Viejo.

To effectively produce housing at the extremely low-, very low-, and low-income levels, I recommend that the City:

Recommendations

As the City moves forward with the Housing Element update, I urges the City to support the development of affordable homes. The City needs to ensure opportunity sites are not simply upzoned or rezoned without including affordable housing policies that will capture the financial and land use incentives being given to property owners and market rate developers. I would like to provide the following recommendations to the City:

1. The City should implement the proposed Inclusionary Housing Ordinance so that it requires that 5% of all units are affordable at the extremely low income level, 5% at very low, and 5% at low, for a total of 15% of all units set aside for affordable housing.
2. Identify city-owned sites and surplus land and prioritize these sites for the development of housing exclusively at the extremely-low, very low and low income level.
3. Prioritize affordable housing funding and programs to increase affordable housing options for families of lower incomes, especially at very low and extremely low-income.
4. Ensure that development sites being identified and discussed in the initial draft are realistic and available during the planning period. Greater analysis is needed on the potential transition and feasibility of sites proposed to meet the lower income needs, especially on sites proposed for rezoning.
5. The city should also further analyze the City’s development patterns, zoning, housing policies and land use that have led to such a disparity in creating new housing opportunities. This disparity is demonstrated by the city’s RHNA process in the current planning period.
6. Ensure housing opportunity sites identified are not simply upzoned, rezoned or become part of overlays or specific plans that give away higher density and development incentives, without capturing the increase in financial gain and land use incentives being given to property owners and market rate developers. A 15% affordable housing inclusion at extremely low (5%), very low (5%) and low-income (5%) is necessary on these sites in exchange for these enhanced development opportunities and incentives.
7. The City should provide an adequate analysis and recommendations on how the City will Affirmatively Further Fair Housing (AFFH). Most of the affordable housing development opportunities have been identified and planned in the lower and moderate resource areas

of the City. AFFH requires that cities promote the creation of affordable housing in high resource areas that provide important amenities such as schools, grocery stores, and medical services while also encouraging investment and conservation in low resource areas. The City needs to provide better strategies to facilitate affordable housing in higher resource areas, especially on the 6th Cycle Housing Element sites identified in this area. Furthermore, under AFFH, the City should also include anti-displacement policies that protect low income residents from rising rents and commit to reinvesting in low resource areas to improve the quality of living of residents in those areas.

I encourage you to consider my recommendations and to urge the City of Aliso Viejo to develop and implement policies that will effectively produce lower income housing. I appreciate you taking the time to read this letter.

Sincerely,

Amir Baum

From: Kate VC <cvc4joy@gmail.com>
Sent: Tuesday, January 11, 2022 10:08 AM
To: Tiffany Ackley <TAckley@AVCity.org>; Ross Chun <rchun@AVCity.org>; Richard Hurt <RHurt@AVCity.org>; Dave Harrington <dharrington@AVCity.org>; Mike Munzing <MMunzing@AVCity.org>; David Doyle <DDoyle@AVCity.org>; Omar Dadabhoy <Odadabhoy@AVCity.org>
Cc: Rona Henry <rona.s.henry@gmail.com>; Dan Schmid <dan@tca-arch.com>; Cesar Covarrubias <cesarc@kennedycommission.org>; Marisa.Prasse@hcd.ca.gov; McDougall, Paul@HCD <Paul.McDougall@hcd.ca.gov>
Subject: Public Comment: Aliso Viejo Housing Element Draft dated Jan 5, 2022

CAUTION: This email originated from outside of our City of Aliso Viejo network. Do not click links or open attachments unless you recognize the sender and know the content is safe.

January 10, 2022

Regarding: Aliso Viejo 2021-2029 2nd Housing Element Draft

Dear Mayor Ackley, Mayor Pro Tem Chun, Councilmembers Harrington, Hurt and Munzing, City Manager David Doyle and Community Development Director Omar Dadabhoy:

Thank you for providing notice of the most recent Housing Element Draft. I also appreciated time spent today with Omar Dadabhoy who was able to clarify many aspects of the document for me.

The Aliso View 6th Cycle Housing Element has been materially improved in many aspects. Items I noticed as well drafted and meeting HCD requests, in my opinion, include:

- The review of the 5th cycle as been improved in several areas. Thank you for that detail. Some of the program goals originally lacked metrics and measurements which make a firm evaluation impossible. Programs for the 6th Cycle are acceptable in my view, even though programs could often be improved with stronger action words and metrics. I will look for very specific accomplishments in each annual report going forward.

- The new draft adds extensive discussion of Affirmatively Furthering Fair Housing. Thank you for this. I particularly appreciate Policy H-3.2 looking for best practices in other cities.

- Population differences and trends in the city are better described in this draft. The needs of the lower income "Iglesias" neighborhood near my own home are well described. I appreciate the targeting of housing information for these particular neighbors and look forward to the Fair Housing Foundation's work there (Policy H-3.17).

- The Site Inventory had many improvements including the required spreadsheet format. I understood that the spreadsheet should stand alone, rather than being embedded, so you might want to confirm with HCD. Income level information for units, parcel numbers, density, and acreage were all improved, together with addressing infrastructure and transportation for the sites.

- The HCD requests in Section A of their letter, parts 2, 3 and the first three parts of 4 are handled well. Letter sections D, E, F and G seem to be addressed.

- The ADU section has been amended and I appreciate the more realistic approach. Thank you for the addition of Policy H-3.7.

- Fees, zoning, and permit procedures are now well outlined.

- Residential care facilities and ADU zoning, as well as other legal update items in the HCD letter, are now clearly identified for compliance.

There are some items, as I discussed with Omar today, that still seem to be missing. It appears that he may have drafted additional comments pertinent to these items that were omitted, either on purpose or inadvertently, by the consultant. It is my understanding Omar will review these items prior to submission to the Council. These items are included below.

The site inventory has been improved in providing parcel numbers, income levels and specificity on units - but the reasons and the context for selecting these sites and their specific practical potential is just not in the Housing Element. On page 6 of the letter, HCD discusses Realistic Capacity and non vacant sites. I had also addressed this concern in my letter of August 18th. This is the area that I find most problematic in the second draft.

I have the impression that considerable background work has been done relative to each site — such as talking with owners, and the long standing planning related to Gateway Center. But such work remains missing. There is no discussion of "realistic capacity." Such background might be obvious to the staff and Council, and even those of us present during presentations, but this supportive information is not necessarily clear to other readers and it is specifically requested by HCD. Since the sites are not vacant, there is supposed to be a robust discussion of impediments to development including past city experience. Aliso Viejo has had development success in the past, so those projects may be helpful in this context. Since sites are occupied, current uses must be discussed and I believe there are vacancies that are pertinent to why these properties were selected. Discussions were held with some owners which should be described. I can imagine that developers actually read Housing Elements with an eye to the selected sites. Without these explanations, the sites don't appear as viable as they probably are. See page 11 of HCD letter.

In my talk with Omar today, I mentioned my concern on page H-14. The first bullet says "sites will be selected from … CP-26" The city must rezone ALL the sites identified since the units exactly meet the RHNA requirement. This wording should be changed even though it is often used in other housing elements.

It is problematic that there is no buffer, that is additional units exceeding the RHNA number, should any sites be eliminated over the course of the cycle. If sites must drop off the selection list, the city will have to revisit site selection to meet the "no net loss" requirement. I understand we don't have other excellent prospects at this time. Perhaps HCD allows the city to visit this problem if and when it arises. I am unsure. I would suggest Aliso Viejo begin assessing congregational structures, and any other buildings with a high vacancy rate, in case there is potential with those buildings.

I suggest the city strive to accomplish zoning changes within two years if the HE deadline is met.
I would like to see Homeownership Assistance section bolstered slightly. As I've mentioned before, a website display is not sufficient for needy citizens. Direct communication is powerful in preventing Aliso Viejo residents from becoming unhoused. I understand that the Fair Housing Foundation does community education. A quarterly meeting and opportunities in Spanish would be wonderful. Some programs are mentioned in the Element. Programs for individuals and families can include OC Housing is Key, OC Housing Emergency Housing Voucher program, OCHA Homeownership down payment assistance, OCHA programs for veterans and foster youth growing up, the OC Mortgage Assistance Program (MAP), CalHFA ADU program, and more! Let's make sure education is easily accessed and draws people in with strong participation. Please track the sessions held, the number of participants, and report results very specifically in every annual report.

Aliso Viejo should look for opportunities as each annual report progresses to find ways to be specific. Our housing goals should be practical, specific, and enthusiastic. Results should contain metrics and measurements.

Thank you for all the sincere efforts made towards a sound housing program and the opportunity to comment.

Sincerely,

Kate

Catherine (Kate) Van Camp

Cc: Welcoming Neighbors Home, Kennedy Commission, HCD

Comments & Responses

Aliso Viejo 2021-2029 Housing Element

Comment	Response
1. In the 2013-2021 planning period there were 534 moderate-income housing units built compared to 34 lower-income units – a ratio of 15 to 1. We would like to see an even more balanced approached to development in the 6th Cycle. We are especially interested in the city offering more lower-income family rentals (3 and 4 bedroom apartments.)	While the City will advocate with developers to construct large bedroom units, it is important to note that cities do not build housing. Cities have little control over the number of affordable housing units (including affordable units) that are built. City plans and regulations create opportunities and incentives for development, but private property owners, developers and builders decide if and when to build based on many factors outside cities' control including general economic and housing market conditions, individual business plans, state and federal policies, interest rates, private lender policies, the cost of materials, labor cost and availability, other investment opportunities, available public subsidies for affordable housing, etc. It is also very important to know that large public subsidies are typically necessary to produce deed-restricted low-income housing. In the urban coastal areas of Southern California, required subsidies can be in excess of $300,000 per unit. For the SCAG region alone, this translates into a total cost of over $167 billion based on the lower-income RHNA of 558,000 units for the 8-year planning period. For comparison, the total cost of the federal Low Income Housing Tax Credits (LIHTC) program for the entire nation is about $11 billion per year. With regard to 3- and 4-bedroom apartments, the City does not control unit sizes. However, some affordable housing subsidy programs such as the Low Income Housing Tax Credits program include priority or incentives for large units.

Comment	Response
2. Sites listed as candidates for re-zoning have a lot of potential. While all of the sites have existing structures, several of the sites are unoccupied. Rather than taking 3 years to re-zone the sites, we urge the city to re-zone them within 1 year of the 6th Cycle Housing Element being adopted.	The City intends to start the rezoning process as soon as there is confirmation from HCD that the proposed sites are acceptable. with the understanding that large-scale rezoning is a very complex process due to extensive State legal requirements including CEQA compliance and public participation. The City is an advocate for the State legislature adopting CEQA amendments or exemptions that would streamline the rezoning and housing development process, as they have for some other types of developments such as sports stadiums. If an EIR is necessary, the required time to process zoning amendments could easily take more than a year. In addition, the City has a very small staff and a large work effort such as a Housing Element update or major rezoning requires an extensive amount of time and money. While the State has made some grant funds available to assist cities in these efforts, consultant costs often exceed available grant funds. Further, when the State Legislature adopts new housing laws imposing additional administrative burdens on cities, there is typically no State funding provided to cover cities' costs in implementing the new requirements. Instead, the Legislature typically justifies this lack of funding by allowing cities to charge fees on new development to cover the additional cost. At the same time, the State criticizes cities for high development fees, which exacerbate the cost of housing.
3. We also urge the city to rigorously pursue affordable housing developers, such as Jamboree, National CORE or others, and reduce constraints to incentivize them build affordable housing units in Aliso Viejo so the city can meet its 6th Cycle RHNA goals of 574 lower-income units.	The City works cooperatively with affordable housing developers. For example, the City has worked with USA properties to construct two senior affordable housing developments with 398 affordable units. City Staff also has relationships with local affordable housing developers and will work with them to develop the proposed sites. With regard to meeting the RHNA, it is important to note that State law does not require cities to achieve the RHNA allocations. Rather, cities must provide sufficient opportunities for housing

Comment	Response
	development through their plans and zoning regulations commensurate with the RHNA. While some cities have been able to actually achieve their RHNA allocations in previous housing cycles, the RHNA allocations were *more than tripled* for the 6th planning cycle – to over 1.3 million units for the SCAG region compared to about 400,000 units in the previous cycle. The primary reason for the huge RHNA increase is the State's change in the RHNA methodology to include existing households who are overcrowded (more than 1 person per room) or are overpaying (more than 30% of gross income for housing) in addition to projected population growth. The RHNA is a planning goal based on the amount of new housing that would need to be built in the next 8 years to accommodate every new household *while also completely eliminating overcrowding and overpayment for every existing household in the region*. "Existing need" was not included in any previous RHNA cycle during the past 40 years. Almost half of the total RHNA in the SCAG region for this cycle is due to existing need rather than projected growth. *For Aliso Viejo, the assigned housing need due to population growth is 48 units while the city's assigned share of the region's existing need due to existing overcrowding and overpayment throughout the region is 1,144 units*. Regional growth forecasts are based on a variety of factors including land available for development. Aliso Viejo is almost fully developed, and the only opportunities for new housing are through the redevelopment of existing properties. Unlike older areas like northern Orange County and Los Angeles County, there are no blighted areas in Aliso Viejo that are obvious candidates for redevelopment. Property owners will only demolish and redevelop existing properties if the economics "pencil out" and from a financial perspective, it seems unlikely that redevelopment equal to the City's

Comment	Response
	RHNA allocation will occur in the next 8 years, no matter what policies the City adopts to encourage housing development. Given all these facts, it does not seem reasonable to expect that Aliso Viejo will "meet its RHNA" if that phrase is interpreted to mean "achieve its RHNA."
4. We are especially excited about The Commons – where formerly Lowe's was located. It is conveniently located near Trader Joe's and other shopping. It is a huge property – but of course there are existing structures there. Does this site already have a housing overlay with affordable housing requirements? If so, could you please elaborate on the requirements and what exactly is planned for this area? The Aliso Viejo Town Center is promising with its large parking lot. Again, does this site have an existing housing overlay and what are the affordable housing requirements? For the Business Park on Aliso Viejo Parkway, we note there is a "Space Available" sign outside. This property seems to encompass 3 very large buildings and a huge parking lot, but we can't tell what the potential is. How much space is available? Does the owner want to redevelop the property into housing? How long are the leases that are now in place? We think this would be a wonderful location for the city to encourage a partnership between the owner and affordable and permanent supportive housing developers such as Jamboree and National CORE to apply for Project HomeKey funding. We note there is a "Space Available" sign outside 35 Journey and 41 Columbia. Again, please share your analysis of the potential here. For 1 Columbia we did not see a "Space Available" sign outside. What is your analysis of this site? Why do you think it has potential to be re-developed?	The City has discussed the potential of an affordable housing overlay with the owners of the proposed sites. All of the owners welcomed the overlay and many had already started to investigate the possibility of redeveloping their properties. Due to the time constraints State law imposes on cities for preparing Housing Element updates, the analysis of rezoning strategies for the candidate sites is preliminary and conceptual. State law identifies a 2-step process, with step 1 being identification of candidate sites in the Housing Element, and step 2 being subsequent detailed studies (including CEQA analysis and public hearings) leading to rezoning. Accordingly, detailed analysis of specific development parameters for the candidate sites will be conducted after final adoption of the Housing Element, along with additional public review and discussion. The identification of candidate sites is based primarily on staff's knowledge and development inquiries from property owners.

Comment	Response
We were interested to hear that there is vacant land by Liberty and that TransWestern already has an application to build there. We think that would have been a terrific location for permanent supportive housing since it would have been close to behavioral health providers.	
5. ADUs – We note the projection of 40 ADUs to meet the RHNA goals. We would like to see more details on the plan to monitor to development and affordability of ADUs - including, as other cities have done, a plan to track ADU rents to measure if progress is being made on the production of affordable units. In addition, we would like to see more incentives put in place to encourage the development of ADUs – such as expedited review of ADU permits, pre-approved ADU design plans and reduction of permit fees for deed restricted affordable ADUs.	The City's current ADU requirements in the Aliso Viejo Municipal Code require annual reporting of ADU rents. The City intends to incentivize ADU production through the creation of a guidebook for the creation and design of ADU's if grant funds can be obtained. The City will also work with interested parties to identify any obstacles to the development of ADU's and proposed Zoning Code changes based on the feedback received. However, it should also be recognized that the cost of building an ADU can be quite high - $250,000 would not be unusual for a 800-sq-ft ADU assuming a cost of about $300 per square foot.
6. Program 4: Section 8 Housing Choice Vouchers - We ask that the City be more specific and robust in their plans for educating residents about the Federal Housing Choice Voucher rental assistance program. We especially urge the city to do outreach to landlords to encourage them to accept housing vouchers because we are hearing that even when people are approved for the vouchers, they cannot find landlords who will accept them. We also recommend that the City coordinate with United Way to bring informational sessions about their Welcome Home OC program to Aliso Viejo landlords. This program is a landlord incentive program that provides financial incentives such as double security deposits, sign-on bonus, holding fees, and other assurances for landlords who rent units in Orange County to individuals, Veterans, and families with a housing voucher. The program is a joint effort between the United to End Homelessness initiative, Orange County United Way, Public Housing Authorities, and rental property owners to reduce	The Orange County Housing Authority operates the Housing Choice Voucher program. The City will request that the Housing Authority provide additional educational opportunities for landlords and residents. The City has promoted the Welcome Home OC program via the City's social media outlets, and will continue to coordinate with the United Way to disseminate program information to landlords in Aliso Viejo.

Comment	Response
the time involved in the search for housing by increasing the availability of rental units.	
7. Although the city has achieved a degree of success in encouraging affordable housing, given that all the proposed sites have buildings on them, we think that a much more robust set of programs are needed to affirmatively attract developers to build lower income housing in Aliso Viejo.	As discussed in No. 4 above, the City has discussed the potential for an housing overlay with many of the property owners and there is widespread interest. The City also welcomes suggestions on potential programs that can be deployed to attract developers.
8. Inclusionary Housing Ordinance - Given the urgent need of residents for low-income housing, the Kennedy Commission strongly recommends the City adopt an Inclusionary Housing Ordinance within the next year to ensure that identified sites are truly feasible and effectively provide affordable housing in a balanced manner. We recommend that the ordinance include a 15% requirement of affordable housing production at extremely-low-, very-low- and low-income categories and that it apply to all residential projects. The ordinance should be flexible to allow for the development of affordable housing onsite, off site, or provide for an appropriate in-lieu fee option. We recommend an in-lieu fee option in the range of $10,000 to $15,000 per unit, or $10 to $15 per square foot, to go along with this policy. The in-lieu fee must be calculated to achieve the gap financing needed to create affordable housing and be used to leverage additional state and federal housing funds. We recommend the affordable units be deed restricted for at least 55 years. A feasibility study and implementation of the ordinance should be completed no later than one year from the adoption of the Housing Element.	While the City agrees that there can be benefits to inclusionary housing ordinances, practically speaking, the City has been more successful in their absence. In the City's experience, with inclusionary housing ordinances, which generally require 15% affordability, developers design their projects to meet that minimum requirement. With the developments at 2 Liberty and 100 Freedom Lane, the City was able to obtain 100% affordability (excluding manager's units). In addition, inclusionary housing, and variations such as housing overlay zones, are techniques used by many cities to require the production of affordable housing as part of development projects. However, these techniques are not universally supported because they impose an additional cost on property owners and developers. As the saying goes, "There is no free lunch." Selling or renting some housing units at below-market rates must be offset by higher prices for other units, or lower revenues for the property owner or developer. Another argument against such techniques is that they discourage development or steer development into other areas without such requirements. The State has taken a neutral position on inclusionary requirements, and a recent law established a threshold of 15% lower-income inclusionary requirement above which the State requires a financial analysis to evaluate whether the requirement acts as an unreasonable constraint on housing development.

Comment	Response
	Even absent a formal inclusionary requirement, the City has been successful in negotiating affordable housing production as part of the development entitlement process – for example:
9. Mixed-Use Zoning – We support the city's planning for mixed-use developments that provide residential units along major corridors and can provide significant opportunities for affordable housing development. We understand that mixed-use zoning allows for the integration of housing with other uses on underutilized commercial or industrial sites while retaining existing commercial/industrial square footage usage to provide services to new residents and the surrounding community. We recommend that the City require 15% of housing to be affordable at the extremely-low-, very-low-, and low-income levels in the mixed-use zoned focus areas.	See #8 above
10. Affordable Housing Overlay – The City should adopt an Affordable Housing Overlay, especially over the mixed-use focus areas that are being rezoned and upzoned. A minimum of 15% of all units should be set aside for extremely low-, very low-, and low-income levels in exchange for development and regulatory incentives. The City must identify a timeframe to study the policy and a timeframe for adoption and implementation. We recommend that this happen in the first year of the 6th Cycle as part of the Zoning Code update.	See #8 above
11. Congregational Housing Overlay - A Congregational Housing Overlay Zone provides an opportunity for the development of affordable housing on religious sites while retaining the existing religious use. The overlay would provide 100% affordable units on congregational sites, with a focus on extremely-low-, very-low- and low-income categories.	This idea was proposed to the City by a local housing advocacy group. There is merit to this idea and the City continues to investigate the possibility.
12. Adaptive Reuse Ordinance - Certain building, fire code, and parking requirements add costs to building conversion projects and reduce the likelihood of developers converting commercial buildings to residential. The City should consider the adoption of an Adaptive Reuse Ordinance, such as Santa Ana's ordinance, to provide alternative building and fire standards for the conversion of eligible	While the ordinance referenced is specific to the needs of Santa Ana, there is the possibility that one or more of the proposed sites could adaptively reuse the existing structures on site. The City will investigate the reference ordinance further and include provisions as appropriate during the rezoning process.

Comment	Response
buildings in exchange for 15% of converted units dedicated to extremely low-, very low- and low-income categories.	
13. Community Land Trust - The City should consider developing a Community Land Trust that would allow the City to retain ownership of land (either donated or purchased) and lease the land to the owner of the improvements for community benefit and the creation of 100% affordable housing.	The City will investigate this proposal further.
14. Density Bonus - The City should analyze the effectiveness of the City's density bonus ordinance to develop affordable housing for lower-income households. The City's 5th cycle RHNA progress demonstrates that moderate and above moderate-income housing production has outpaced lower-income housing development by a 15 to 1 ratio. The City should prioritize affordable housing for lower-income households in its update and implementation of density bonuses. The review should include analysis as to how the density bonus is being implemented. This is especially important when analyzing its effectiveness in higher density specific plans and rezonings that give density and land use incentives and parking reductions, similar to the density bonus, but without requiring affordable housing. It is worth noting that rental developments can only use density bonuses to incentivize lower-income units.	The City most recently evaluated its density bonus provisions with the two developments at 2 Liberty and 100 Freedom Lane. However, the City believes that there is merit in continual reevaluation of all of its Municipal Code provisions and will reevaluate the density bonus section of the Code.
15. Incentivizing 100% Affordable Housing - Regulatory, zoning and administrative requirements can contribute to high construction costs, and negatively affect the feasibility of producing affordable housing. The City should develop a program that incentivizes 100% affordable developments and reevaluate the current zoning code to eliminate barriers and create incentives for affordable housing developments. Incentives could include reducing or eliminating permitting fees, offering additional by-right incentives beyond density bonus, reducing parking standards, and alternative development standards. The City should consult with for-profit and nonprofit developers to determine appropriate regulatory incentives.	Recent changes to State density bonus law already provide the incentive of at least 80% density bonus in addition to other incentives and concessions for 100% affordable projects.

Comment	Response
16. City Owned Sites and Surplus Property - The city should prioritize city owned sites and surplus land to be developed exclusively for 100% affordable housing for low, very low and extremely low income families. The City must be proactive and implement a program that markets available surplus land to affordable housing developers.	The City currently owns no surplus property. It owns the property in which City Hall is located and three park properties all of which it intends to retain.
17. We also recommend that the city issue an RFP to actively solicit affordable housing developers to the city. We would like to see the city offer support from the fund of collected in-lieu fees in exchange for development of extremely-low-, very-low and low-income housing units as well as funding available from the State of California's HomeKey funds, and the federal government American Rescue Plan Act funds. The Project Homekey deadline is January 31st. There is a source of funding, the Permanent Local Housing Allocation (PLHA), that will be available in 2022. This PLHA funding is readily available to cites but only if they apply for it. Is our city tracking these program deadlines to bring these resources to our community? Are we aware of all funding opportunities? It is important for the city to take advantage of these funding sources NOW to make important strides in the provision of affordable housing.	Affordable housing RFPs are typically issued when a city controls the property. Currently, the City does not own any surplus property that is available for affordable housing.
18. Ensure that development sites being identified and discussed in the initial draft are realistic and available during the planning period. Greater analysis is needed on the potential transition and feasibility of sites proposed to meet the lower income needs, especially on sites proposed for rezoning.	See #4 above
19. The city should also further analyze the City's development patterns, zoning, housing policies and land use that have led to such a disparity in creating new housing opportunities. This disparity is demonstrated by the city's RHNA process in the current planning period.	See #1 above
20. Ensure housing opportunity sites identified are not simply upzoned, rezoned or become part of overlays or specific plans that give away higher density and development incentives, without capturing the increase in financial gain and land use incentives	See #8 above

Comment	Response
being given to property owners and market rate developers. A 15% affordable housing inclusion at extremely low (5%), very low (5%) and low-income (5%) is necessary on these sites in exchange for these enhanced development opportunities and incentives.	
21. The City should provide an adequate analysis and recommendations on how the City will Affirmatively Further Fair Housing (AFFH). Most of the affordable housing development opportunities have been identified and planned in the lower and moderate resource areas of the City. AFFH requires that cities promote the creation of affordable housing in high resource areas that provide important amenities such as schools, grocery stores, and medical services while also encouraging investment and conservation in low resource areas. The City needs to provide better strategies to facilitate affordable housing in higher resource areas, especially on the 6th Cycle Housing Element sites identified in this area. Furthermore, under AFFH, the City should also include anti-displacement policies that protect low income residents from rising rents and commit to reinvesting in low resource areas to improve the quality of living of residents in those areas.	Appendix C.7 of the revised draft Housing Element includes additional extensive analysis of fair housing issues.





City of Aliso Viejo

2021-2029 Housing Element Update

CITY COUNCIL PUBLIC HEARING

JANUARY 19, 2022

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Overview

Aliso Viejo General Plan

- Land Use
- **Housing**
- Circulation
- Conservation/Open Space
- Safety
- Noise



Housing Element update required for 2021-2029 period

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Public Review Process to Date

- May 19, 2021 City Council study session
- August 18, 2021 City Council public meeting
- August – October, 2021 HCD review
- January 12, 2022 public workshop
- January 19, 2022 City Council public hearing

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Response to HCD Review

- Conducted additional public outreach
- Significantly amended the Affirmatively Furthering Fair Housing section
- Provided additional information regarding properties included in site inventory
- Enhanced Government and Non-Government Constraints sections

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Housing Element Certification

- Limitations on local land use control
- Housing is a “matter of statewide importance”
- State Legislature has delegated HCD authority to review Housing Elements for compliance (“certification”)
- Potential legal consequences for non-compliance
- Certification supports the legal validity of the Housing Element and General Plan
- City Council must consider HCD comments & adopt findings

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Housing Element Content

- Housing Plan
  - ✓ Goals, Policies, Programs, Objectives
- Community Profile
  - ✓ Demographics & Housing Needs
  - ✓ Resources & Constraints
  - ✓ Evaluation of the Prior Housing Element
  - ✓ Affirmatively Furthering Fair Housing

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Key Requirements

Housing regulations consistent with State law

- ✓ Persons with special needs
- ✓ Fair housing

Regional Housing Needs Assessment (RHNA)

- ✓ Adequate sites to accommodate assigned need

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RHNA

- Regional housing need assigned to SCAG by HCD
- RHNA Plan prepared by SCAG
- Each city & county assigned a share of total need based on projected growth, existing need & access to jobs & transit
- RHNA allocation distributed among income categories
- RHNA is a planning target, not a development quota
- Cities must provide realistic development opportunities with zoning to accommodate the RHNA at all income levels

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RHNA

6th Planning Cycle (2021-2029)

SCAG region:	1,341,827 units
Orange County:	183,861 units
Aliso Viejo:	1,195 units

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RHNA

Aliso Viejo RHNA (2021-2029)

Income Category	Units
Very low	390
Low	214
Moderate	205
Above mod	386
Total	1,195

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Site Inventory Summary

Site	Current Zoning	Total Acreage	Potential Density (du/ac)	Potential Units
Towers/The Commons	SP-2	4.1 acres	34	140
ADUs	na	na	na	5
1 Columbia	BP-2	2 acres	30-50	60
41 Columbia	BP-2	2 acres	30-50	60
35 Journey	BP-1	2 acres	30-50	60
26800-26880 AV Pkwy	BP-1	7 acres	30-50	210
The Commons	SP-2	10 acres	30-50	497
AV TC Gateway	CT	7 acres	30-50	210
TOTAL UNITS				**1,242**
RHNA				**1,195**

Legend: Existing capacity
Candidate sites for rezoning

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Site Inventory – Potential Sites

1 Columbia

Site Size: 2 acres

Info: Office building at the Corner of Columbia and Aliso Creek Road

Zoning: BP-2



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Site Inventory – Potential Sites

41 Columbia

Site Size: 2 acres

Info: Office building formerly occupied by Benny Hinn Ministries and Love World.

Zoning: BP-2



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Site Inventory – Potential Sites

35 Journey

Site Size: 2 acres

Info: Office building located at corner of Journey and Aliso Creek Rd.

Zoning: BP-1



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Site Inventory – Potential Sites

26800-26880

Aliso Viejo Parkway

Site Size: 7 acres

Info: Mid-block office buildings located

Between Glaukos campus and Pacific Park Dr.

Zoning: BP-1



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Site Inventory – Potential Sites

The Commons

Site Size: 9.9 acres

Info: Potential to add mixed-use component to parking lot area adjacent to building previously occupied by Lowe's

Zoning: SP-2



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Site Inventory – Potential Sites

AVTC Gateway District

Site Size: 7.2 acres

Info: Mixed-use potential. Community Design Process anticipated 300 housing units.

Zoning: CT



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Next Steps

Date	Milestone
January 2022	City Council review & approval – Housing Element
Feb-March 2022	HCD review #2 – adopted Housing Element
April-October 2022	Zoning amendments ▪ Detailed site analysis & CEQA review ▪ Public outreach ▪ City Council review & approval

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For more information:

https://avcity.org/371/Housing-Element

Questions & comments?

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City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: David Doyle, City Manager

SUBJECT: ACCEPTANCE OF DONATED SCULPTURE FROM ARTIST JON SEEMAN FOR PLACEMENT AT ALISO VIEJO RANCH

Recommended Actions:

1. Accept donation of sculpture from artist Jon Seeman for placement at Aliso Viejo Ranch; and

2. Appropriate funds from General Fund Reserves and authorize City Manager to approve expenditures not to exceed $2,000 for related installation costs.

Fiscal Impact:

The sculpture, comprised of material from Aliso Viejo Ranch, is being donated by local artist Jon Seeman so there is no cost for the art piece itself. However, the City will likely incur incidental costs for all or some of the following:

1. Creation of a concrete mounting pad.
2. Installation of lighting specific to the art piece.
3. Moving the art piece from its current location to the site and placing it on the concrete pad.

Discussion:

Jon Seeman was born in Laguna Beach. He and his wife have been residents of Aliso Viejo for many years, even pre-dating the City's incorporation. Jon is an internationally recognized artist with public art pieces throughout California and various other states including Arizona, Nevada, and Illinois as well as Mexico and Japan. Mr. Seeman's work history, education and professional information can be found on his website at https://jonseeman.com/.

Mr. Seeman approached the City several months ago inquiring about the possibility of donating an art piece to be placed at Aliso Viejo Ranch. Staff has been working with Mr. Seeman since that time and provided him access to the numerous historical items

currently in storage onsite. Mr. Seeman, working with the City's historical consultant, selected several items to create the proposed sculpture.

If approved, staff will work with the artist to select the appropriate location for the art piece and coordinate the delivery and installation.

Attachment:

1. Proposed Sculpture

City of Aliso Viejo
AGENDA ITEM

DATE: January 19, 2022

TO: Mayor and City Council

FROM: David Doyle, City Manager

SUBJECT: RESOLUTION AMENDING CITY EMPLOYEE SALARY SCHEDULE TO MODIFY EXISTING POSITION AND ADD NEW HUMAN RESOURCES ANALYST POSITION

Recommended Action:

Adopt a Resolution amending City employee salary schedule to modify existing position and add new Human Resources Analyst position.

Fiscal Impact:

As a result of the proposed position modifications, first year cost savings will be approximately $10,000. Annual cost savings after the first year is anticipated to be $43,510.

Discussion:

Earlier this year the Human Resources Manager (HR Manager) position became vacant. Since that time, the City utilized an interim, part time HR Manager (15 hours a week) and in-house City staff to fill the void. For the past two years the City staff member has been assisting the HR Manager performing many of the day-to-day tasks as a collateral duty. Since the vacancy approximately 6 months ago, the City staff member has assumed nearly all the required duties and responsibilities. At this time, the individual is more than capable of performing the Human Resources function.

The City staff member has a strong interest in pursuing a career in human resources and has shown a competency in all areas. However, at this time, the staff member doesn't have the experience or expertise to assume the role of HR Manager. Therefore, it is recommended the City Council approve the creation of the Human Resources Analyst position. This would provide an opportunity for professional growth for the employee and benefit the City by having a current employee with a strong work ethic who is familiar with the City's policies and procedures providing the Human Resources services.

To provide additional services and specialty work, it is proposed the part-time HR Manager position continue to assist for the next 12 months. After the first year, it is expected the part-time HR Manager services will no longer be needed, or the need would be substantially reduced. The City also has historically utilized the City Attorney's Office for certain personnel issues, and it is expected this would continue as would the City's membership in the Law Offices of Leibert Cassidy & Whitmore Labor Relations Consortium.

Specifically, the proposed modifications to the City Salary Schedule for City Employees are as follows:

1. Move the existing Human Resources Manager position to the Part Time Employee Salary Schedule ($51.78 per hr. - $71.20 per hr.).
2. Add Human Resources Analyst position ($76,068 - $104,594) to Full Time Employee Salary Schedule.

Attachments:

1. Resolution

2. Salary Schedule

3. HR Analyst Job Description

RESOLUTION NO. 2022-___

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, CALIFORNIA, APPROVING A SALARY SCHEDULE FOR CITY OF ALISO VIEJO EMPLOYEES

WHEREAS, on June 2, 2021 the City Council approved an updated Classification and Compensation Plan which included adjusting salary ranges on July 1st of each year based on the Annual Consumer Price Index, Urban Wage Earners and Clerical Workers, Los Angeles-Long Beach-Anaheim ("CPI"); and

WHEREAS, a new position titled, Human Resources Analyst, shall be created and added to the full-time classification list; and

WHEREAS, the Human Resources Manager position shall be removed from the full-time classification list and added to the part-time classification list.

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

Section 1. Effective January 19, 2022, the position of Human Resources Analyst shall be created and included in the salary schedule, full time classification and position shall receive either a cell phone allowance of $75.00 per month or a City issued cell phone.

Section 2. Effective January 19, 2022, the position of Human Resources Manager shall be removed from the full-time classification list and placed on the part-time classification list.

Section 3. Effective January 19, 2022, salary ranges and base salaries for all classifications shall be as shown on Exhibit B, Salary Schedule.

PASSED, APPROVED AND ADOPTED this 19th day of January 2022.

Ross Chun
Mayor

APPROVED AS TO FORM:

Scott C. Smith
City Attorney

ATTEST:

Mitzi Ortiz, MMC
City Clerk

Exhibit A

City of Aliso Viejo
Salary Schedule
Effective January 19, 2022

Full-Time Classifications	Annual Range Minimum	Annual Control Point	Annual Range Maximum
Accountant	$67,427	$77,264	$92,716
Accountant/Payroll	$64,217	$73,584	$88,301
Accounting Technician	$48,247	$55,285	$66,342
Accounting Supervisor	$92,711	$106,235	$127,478
Administrative Secretary	$51,992	$64,531	$77,437
Assistant Planner	$63,372	$72,616	$87,139
Associate Engineer	$86,671	$99,314	$119,177
Associate Planner	$74,357	$85,203	$102,244
City Clerk	$113,460	$130,005	$156,007
City Manager (Contract)			$296,214
Director of Administrative Services	$148,194	$174,147	$208,977
Director of Community Development	$148,194	$174,147	$208,977
Director of Financial Services/City Treasurer	$148,194	$174,147	$208,977
Director of Government Services	$148,194	$174,147	$208,977
Director of Public Works	$148,194	$174,147	$208,977
Director of Recreation and Community Services	$148,194	$174,147	$208,977
Executive Assistant	$64,124	$73,478	$88,174
Facilities Supervisor	$76,068	$87,162	$104,594
Financial Analyst	$67,427	$77,264	$92,716
Financial Services Manager	$107,875	$123,611	$148,333
Human Resources Analyst	$76,068	$87,162	$104,594
IT Analyst	$58,973	$67,583	$81,100
IT Manager	$110,727	$131,027	$157,232
Junior Accountant	$58,379	$66,895	$80,274
Management Analyst	$69,585	$79,736	$95,683
Office Assistant	$39,658	$45,443	$54,533
Office Specialist	$43,625	$53,349	$64,019
Permit Technician	$57,735	$66,337	$79,605
Planning Technician	$53,422	$61,215	$73,458
Recreation Coordinator	$61,548	$70,525	$84,631
Recreation and Community Services Manager	$102,720	$117,704	$141,244
Recreation and Community Services Supervisor	$70,780	$81,104	$97,325
Recreation Specialist	$43,170	$49,467	$59,360
Secretary to the City Manager	$64,124	$78,080	$93,696
Senior Accountant	$77,542	$88,853	$106,623
Senior Planner	$86,525	$99,146	$118,975
Senior Planner I	$86,525	$108,722	$130,466
Systems Administrator	$80,845	$94,618	$113,541

Exhibit A

City of Aliso Viejo
Salary Schedule
Effective January 19, 2022

Elected Officials	Monthly Compensation
Council Members (Municipal Code)	$520
Mayor (Municipal Code)	$520

Part-Time Classifications	Hourly Range Minimum	Hourly Control Point	Hourly Range Maximum
Accountant	$32.42	$37.15	$44.57
Crime Prevention Specialist	$30.01	$34.39	$41.27
Human Resources Manager	$51.78	$61.49	$71.20
IT Analyst	$28.35	$32.49	$38.99
Office Assistant	$19.07	$21.85	$26.22
Planning Aide	$15.74	$18.04	$21.65
Recreation Coordinator (PT)	$29.60	$33.90	$40.69
Recreation Leader*	$14.24	$15.82	$18.98
Senior Recreation Leader*	$16.37	$18.19	$21.83

*Recreation Leader and Senior Recreation Leader to be adjusted as follows effective January 1, 2022 to meet State of California Minimum Wage requirements:

EFFECTIVE JANUARY 1, 2022

Part-Time Classifications	Hourly Range Minimum	Hourly Control Point	Hourly Range Maximum
Recreation Leader	$15.00	$16.66	$20.00
Senior Recreation Leader	$17.25	$19.16	$23.00

ALISO VIEJO

HUMAN RESOURCES ANALYST

DESCRIPTION:

FLSA: Exempt

DEPARTMENT/DIVISION: Administrative Services/Human Resources

DEFINITION
Under general supervision, performs technical and professional, detailed, and confidential work required to administer Human Resources programs including recruitment, classification, compensation, safety programs, employee benefits administration, workers' compensation coordination, leaves of absences, human resources information systems, and employee relations; performs research and analysis; provides consulting services to City departments related to all aspects of human resources activities; performs related work as required.

SUPERVISION RECEIVED AND EXERCISED
Receives general supervision from the City Manager. May exercise technical and functional supervision over administrative support staff.

Class Characteristics
This is professional-level classification within the human resources division. Incumbent performs a variety of Human Resources functions and analytical studies for City departments. Responsibilities include coordinating the activities of the division with those of other departments and providing the complex and varied services of the division. Incumbents work independently in the completion of assigned tasks and are expected to exercise considerable judgment in working within scope authority.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:
Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Assists in designing employee training modules and orientation programs; develops and utilizes specialized training aids.
- Gathers, assembles, preserves, and reports information connected with employee discipline cases.
- Plans, participates in, and evaluates special projects requiring coordination of activities across departmental and functional lines.
- Analyzes the effect of new laws or administrative regulations on Human Resources programs and recommends policies, procedures for implementation.
- Assists and participate in the development and administration of the Human Resources annual budget; recommends goals and objectives.
- Develops and revises human resources documents, procedures, and forms; assists in the development of policies, regulations, and procedures.
- Conducts special research assignments, analyzing data and preparing conclusions and recommendations for consideration by management or special committees.
- Consults with supervisors regarding personnel related issues, needs and services; counsels employees on personnel programs, policies and processes; explains program provisions, procedures and eligibility requirements; and assists employees with forms and personnel documents.
- Coordinate the employee recognition program.

- Assists in developing goals, objectives, policies, procedures, work standards and administrative control systems.
- Conducts surveys and performs research and statistical analyses on administrative, fiscal, personnel, and operational problems or issues.
- Reviews at-will part-time and seasonal employee performance evaluations.
- Performs other duties as assigned.

Recruitment

- Coordinates the recruitment process for City departments; confers with departmental representatives on positions requirements; posts job openings; screens resumes and applications; identifies qualified applicants; develops, administers, and evaluates oral and written examinations and their results; maintains and certifies employment lists in accordance with Personnel Policies and practices; monitors hiring process to assure adherence to human resource policies and applicable personnel policies, coordinates and/or conducts oral interviews, extends job offers and negotiates salaries.
- Coordinates and attends job fairs and other events to publicize City job opportunities.
- Monitors and maintains position control system; verifies recruitment requisition requests against position control system.
- Analyzes requests and assignments related to organizational structure, salary levels, classification and examining procedures.
- Conducts organizational studies; researches personnel issues and regulations; conducts surveys of comparable organizations; recommends classification and compensation for new or revised positions; analyzes results, proposes solutions; and calculates implementation costs.
- Assists employees and management with the interpretation and correct application of City policies, procedures, and programs; provides advice and assistance regarding employment issues; investigates employee complaints.

Workplace Safety:

- Coordinates City-wide safety policies and procedures; coordinates the development and implementation of new safety programs in response to regulatory changes and case law; serves on the City's Safety Committee; serves as a resource for safety related questions and issues.
- Strives to stay informed of and share current OSHA and Cal-OSHA requirements with departmental safety representatives.
- Develops, conducts, or coordinates with consultants to provide occupational health and safety educational programs for staff. Ensures annual health and safety training is scheduled to meet compliance guidelines.

Benefits:

- Performs administrative work related to multi-tiered employee benefits programs that include such plans as retirement, short- and long-term disability, health, life, dental, vision, deferred compensation, and employee assistance.
- Coordinates the employee eligibility and payment computation for employee and retiree benefit and insurance programs with the payroll and accounting divisions.
- Research, analyze and recommend changes in benefit program design and contract provisions.
- Schedule and conduct new employee orientations; inform new employees of benefit program and policies and related deadlines.
- Responds to employee and retiree questions and complaints; interfaces with third-party administrator and carriers to resolve claims appeals and provides guidance in policy interpretation and plan documents.
- Coordinates retirement plan applications and terminations; provides information to employees to increase their awareness of City sponsored benefit programs when selecting their post-service benefit elections.

- Monitors the leave of absence program, ensuring legal compliance; reviews and analyzes FMLA/CFRA applications; makes recommendations and develops employer response; interprets human resources policies and procedures with regards to benefit, paid and un-paid time off options for employees; educates employees and managers on policy and legal compliance regarding leave of absences.
- Conducts citywide open enrollment for benefits; prepares open enrollment benefit materials and literature; coordinates annual benefit fair.

Workers' Compensation:
- Handles day-to-day administration of workers' compensation program by setting up new claims, communicating with injured employees, supervisors, third party administrator and medical care providers to provide direction, facilitate and schedule injured workers' return to duty.
- Coordinates lost time days with payroll and third-party administrator to ensure injured worker receives correct salary and workers compensation benefits.
- Completes and posts required OSHA logs and reports.

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of:
- Principles, practices and techniques of human resources in a public agency setting, including workers compensation; recruitment, selection, equal employment opportunity and employee orientation; job analysis and classification; compensation and benefit analysis and administration; employee relations, including negotiations and the interpretation of laws, regulations, policies and procedures.
- Organizational and management practices as applied to the analysis and evaluation of programs, policies and operational needs.
- Applicable laws, codes and regulations.
- Standard office support practices and procedures, including the use of standard office equipment.
- Computer applications related to the work, including word processing, spreadsheet and database applications.
- Records management principles and practices.
- Techniques for providing a high level of customer service to public and City staff, in person and over the telephone.
- Survey and data presentation techniques.
- Safe driving principles and practices.
- Safe work practices.

Skill in:
- Interpreting, applying and explaining complex laws, codes, regulations and ordinances.
- Effectively representing the department and the City in meetings with governmental agencies, contractors, vendors, and various businesses, professional, regulatory and legislative organizations.
- Preparing clear and concise reports, correspondence, policies, procedures and other written materials.
- Managing multiple projects and deadlines and prioritizing multiple tasks and demands.
- Maintaining accurate files and records.
- Maintaining confidentiality of sensitive personal information of applicants, employees, former employees and other matters affecting employee relations.
- Using English effectively to communicate in person, over the telephone and in writing.

- Using tact, initiative, prudence and independent judgment within general policy, procedural and legal guidelines.
- Establishing and maintaining effective working relationships with employees and those contacted in the course of the work.
- Operating modern office equipment including computer equipment and software programs.
- Operating a motor vehicle safely.

EXPERIENCE AND TRAINING AND LICENSE/CERTIFICATE:

Any combination of training and experience that would provide the required knowledge, skills and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major course work in business or public administration, human resources, or a field related to the work and two (2) years of administrative experience in designing, developing and implementing human resources and risk management programs. Additional years of experience and/or possession of IPMA-CP may be substituted for the education requirement.

Incumbent must possess IPMA-CP certification within 12 months of hire to offset education requirement.

License:
Must possess and maintain a valid California class C driver's license and have a satisfactory driving record.

PHYSICAL STANDARDS:

Physical Demands
Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard, typewriter keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information. Positions in this classification occasionally lift and carry reports and records that typically weigh less than 20 pounds.

Environmental Elements
Employees work in an office environment with moderate noise levels, controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

Working conditions
May be required to work on evenings, weekends and holidays.

Note: All employees of the City of Aliso Viejo are designated by both State law and City ordinance to be "Disaster Service Workers." In the event of a declared emergency or any undeclared emergency or natural disaster that threatens the life, health and/or safety of the public, employees may be assigned to assist rescue and relief workers. Such assignments may be in locations, during hours and performing work significantly different from the employees' normal work assignments and may continue through the recovery phase of the emergency.