



MEMORANDUM

H&CD COMMISSION - REGULAR MEETING AGENDA

Thursday, February 27, 2025 – 10:00 a.m.

OC Housing & Community Development
Conference Room A
1501 E. St. Andrew Pl, 1st Floor, Santa Ana, CA 92705

Vacant, 1st District
Tracy La, 2nd District
Mike Alvarez, 3rd District
Carrie Buck, 4th District
Stephanie Oddo, Chair, 5th District

Dr. Tiffany Mitchell, At-Large
Wayne Carvalho, At-Large
Carla Wilkerson, Tenant Representative
Helen Smith-Gardner, Vice Chair, Tenant Representative
Mike Frost, City Selection Representative
Cecilia Hupp, City Selection Representative

DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES
CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES
JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES
MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE
JULIA BIDWELL
DIRECTOR
OC HOUSING &
COMMUNITY DEVELOPMENT
RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES
PAMELA PASSOW
DIRECTOR
OC PARKS
JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

The Housing and Community Development (H&CD) Commission has been established to perform two functions. (1) As to Orange County Housing Authority matters, the H&CD Commission is to review and make recommendations on those Agenda items, which will be presented to the Orange County Board of Supervisors, sitting as the Board of Commissioners of the Orange County Housing Authority. These items are noted on this Agenda by the designation "OCHA". (2) As to other matters, the H&CD Commission is to provide advice to the Housing & Community Development Department of the County of Orange. These items are noted on this Agenda by the designation "H&CD".

This Agenda contains a brief general description of each item to be considered. Except as otherwise provided by law, no action shall be taken on any item not appearing on the agenda.

In compliance with the Americans with Disabilities Act, those requiring accommodation for this meeting should notify the Orange County Housing & Community Development Commission Clerk 72 hours prior to the meeting at (714) 480-2920 or via email at: ochcdcommission@occr.ocgov.com

Members of the public may address the H&CD Commission regarding any item in the following ways:

1. Written Comment - You may submit comments to the H&CD Commission by emailing them to ochcdcommission@occr.ocgov.com. The comments will be made available to the H&CD Commission members. If you wish to comment on a specific agenda item, please identify the item in your email. General public comments will be addressed during the general public comment item on the agenda. In order to ensure that staff has the ability to provide comments to the Commission members in a timely manner, please submit your comments by 9:00 a.m. the Tuesday prior to the meeting.

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2. In-Person - If you wish to comment on a specific agenda item in-person, please complete a Speaker Request Form(s) identifying the item(s) number, your name, and deposit the completed form(s) in the box located next to the clerk. To speak on a matter not appearing in the agenda, but under the jurisdiction of the H&CD Commission, you may do so during Public Comments item at the end of the meeting. Speaker Request Forms must be deposited prior to the beginning of the consent calendar, the reading of the individual agenda items, the opening of the public hearing and/or the beginning of Public Comments item. Members of the public desiring to speak should address all remarks and questions to the Commission. Speakers may address the Commission on up to three occasions, with three minutes allotted to the speaker per occasion.

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All supporting documentation is available for public review in the Orange County Housing Authority office located at 1501 E. St. Andrew Pl., Santa Ana, CA 92705 during regular building hours, 8:00 a.m. – 5:00 p.m., Monday through Thursday.

I. CALL TO ORDER: Chair or Vice-Chair

II. PLEDGE OF ALLEGIANCE: Chair or Vice-Chair

III. ROLL CALL: Commission Clerk

IV. APPROVAL OF MINUTES:

Recommended Action:

Approve the Summary of Minutes of the meeting held on January 23, 2025

V. PRESENTATIONS/INTRODUCTIONS: (None)

VI. PUBLIC COMMENTS: *At this time, members of the public may address the H&CD Commission regarding any items within the subject matter jurisdiction of the Commission, provided that **NO** action shall be taken on off-agenda items unless authorized by law.*

VII. CONSENT CALENDAR: (None)

VIII. DISCUSSION CALENDAR: (1)

1. Draft 5–Year and Annual Public Housing Agency (PHA) Plan for FY 2025

January Johnson, Manager Housing Assistance Division

Recommended Action:

Direct Staff to receive and record comments

IX. PUBLIC HEARINGS: (None)

X. REPORTS OF STAFF:

A. Orange County Housing Authority Update:

January Johnson, Housing Manager

B. Community Development:

Craig Fee, Community Development Manager

C. Housing Development:

Michelle Zdeba, Housing Development Manager

D. Executive Director/Secretary’s Report:

Julia Bidwell, Executive Director/Secretary

XI. MEMBER COMMENTS: *At this time, Members of the H&CD Commission may comment on agenda or non-agenda matters and ask questions of or give directions to staff; provided that **NO** action shall be taken on non-agenda items unless authorized by law.*

XII. ADJOURNMENT

XIII. NEXT SCHEDULED MEETING:

March 27, 2025

OC Housing & Community Development

Conference Room A

1501 E. St. Andrew Pl, 1st Floor

Santa Ana, CA 92705

Item IV:

MINUTES



MEMORANDUM

H&CD COMMISSION - REGULAR MEETING
AGENDA DRAFT MINUTES

Thursday, January 23, 2025 - 10:00 a.m.

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Conference Room A
1501 E. St. Andrew Pl, 1st Floor, Santa Ana, CA 92705

An Nguyen, 1st District
Tracy La, 2nd District
Mike Alvarez, 3rd District
Carrie Buck, 4th District
Stephanie Oddo, Chair, 5th District

James Mai, At-Large
Wayne Carvalho, At-Large
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I. CALL TO ORDER: Chair or Vice-Chair
Meeting called to order at 10:10

II. PLEDGE OF ALLEGIANCE: Chair or Vice-Chair

III. ROLL CALL: Commission Clerk
Present: W. Carvalho, M. Frost, S. Oddo, C. Wilkerson, M. Alvarez, C. Buck, J. Mai
Excused Absence: T. La, C. Hupp, H. Smith-Gardner
Unexcused Absence: A. Nguyen

IV. APPROVAL OF MINUTES:

Recommended Action:

Approve the Summary of Minutes of the meeting held on December 5, 2024

Motion to approve minutes: C. Wilkerson

Motion seconded: M. Alvarez

Motion Approved Unanimously

V. PRESENTATIONS/INTRODUCTIONS: (None)

VI. PUBLIC COMMENTS: *At this time, members of the public may address the H&CD Commission regarding any items within the subject matter jurisdiction of the Commission, provided that NO action shall be taken on off-agenda items unless authorized by law.*

VII. CONSENT CALENDAR: (1)

- 1. Resident Advisory Board for The Orange County Housing Authority (OCHA) 2025 Annual Plan and 5-Year Public Housing Agency (PHA) Plan**
January Johnson, Manager Housing Assistance Division

Recommended Action:

Reappoint the members of the H&CD Commission to act as the Resident Advisory Board for the OCHA 2025 Annual Plan and 5-Year Public Housing Agency (PHA) Plan

Discussed how public housing agencies are required to prepare a public housing agency plan, which includes an annual plan and a five-year plan. The five-year plan sets goals for the agency, while the annual plan reports on progress towards these goals. A Resident Advisory Board (RAB) helps develop the plan and provides feedback. The RAB members are appointed by the Housing and Community Development Commission.

Motion to approve minutes: C. Buck

Motion seconded: M. Frost

Motion Approved Unanimously

VIII. DISCUSSION CALENDAR: (None)

IX. PUBLIC HEARINGS: (None)

X. REPORTS OF STAFF:

- A. Orange County Housing Authority Update:**
January Johnson, Housing Manager

Discussed housing authorities follow a calendar year for funding, from January to December with unknown funding information until around May, so OCHA is currently waiting for a funding notice. Currently under a continuing resolution until March, funding remains the same as in 2024. Due to inflation, OCHA cannot maintain system levels with 2024 funding. In the meantime, OCHA will not be selecting any names from the waiting list. Updates will be provided as more about the funding situation is known.

C. Buck: Asked that as a result of freezing, do you expect it to change/open the Wait List?

J. Johnson: Explained how OCHA funding is determined by the budget signed by the President, which could be either the Senate or House budget. Both budgets currently appear to be lower than previous

funding levels. Therefore, we do not anticipate being able to pull from the waiting list, but we will not know for sure until the budget is closer to being finalized.

M. Frost: Inquired on how does the group manage the fluctuations in voucher availability? We have many people with vouchers, and we do not want to take any away. Is there a safety net or extra vouchers available? What happens if funding gets too low this year? Would we ever have to take vouchers away, and how would we handle that situation?

J. Johnson: Mentioned OCHA's managing of a large budget with many people involves working closely with HUD on a monthly basis and planning for two to five years ahead. Due to inflation and rising rental costs, it is important to anticipate future financial needs and be cautious about the amount of money received. If there is not enough money available, the administrative plan outlines the process on the steps to take.

B. Community Development:

Craig Fee, Community Development Manager

Provided an update on the Five-Year Consolidated Plan (ConPlan) for FY 2025-29, which outlines the use of HUD funds and addresses housing and community development needs, is being updated and is due by May 15, 2025. Consultant Veronica Tam and Associates are helping with this process, including outreach meetings and a public survey available until January 24, 2025. The draft plan will be presented to the H&CD Commission to highlight high priority needs for the next five years.

C. Housing Development:

Michelle Zdeba, Housing Development Manager

Discussed the County's 2025 Notice of Availability (NOFA) policy and process that is being updated. The recommended changes include updating priority preferences for NOFA applications to include Homekey+ applications for capital and project-based vouchers. Additional updates reflect current federal requirements like Build America, Buy America, and procurement due diligence. Some changes streamline the local process by allowing developers to engage directly with county environmental consultants for the review process. These updates align with state and federal regulations, including the California Tax Credit Allocation Committee, and provide clarification on policies. The changes will be presented to the Board of Supervisors in February 2025 and will make up to \$12.05M in funding and 150 PBV available.

C. Buck: Asked if there is a formula used to balance housing between individuals and families, and do you consider factors like single units vs. 2-bedroom units? Many families in Coordinated Entry System have 1-3 members and struggle to find appropriate housing because the focus is on single bed units. Is there any consideration for this issue?

M. Zdeba: Mentioned that the NOFA does not distinguish between family and individuals. Many projects, being permanent supportive housing, focus on producing single studio or 1-bedroom units. A subset of projects includes 2-bedroom and some 3-bedroom units. Discussions have been ongoing about how the restrictions would work due to the chronically homeless component from the Coordinate Entry System. The NOFA does not calculate or separate between individuals and families.

D. Executive Director/Secretary's Report:

Julia Bidwell, Executive Director/Secretary

- **OCHA has been awarded 50 new HUD-VASH vouchers from the FY 2024 allocation, effective March 1, 2025, bringing the total to 1,089. OCHA now has the 17th largest HUD-VASH program in the nation out of 3,300 other Housing Authorities. Additionally, OCHA successfully secured renewal funding for its four Family Self-Sufficiency coordinators. The Housing Authority's five-year plan, outlining agency goals, will be presented next month. Additionally, the comprehensive five-year consolidated plan, covering housing and community development needs, will be reviewed in March**
- **Lastly mentioning The National Association of Housing Redevelopment Officials (NAHRO) holds an annual calendar contest for children. The theme is "What Home Means to Me," and selected drawings will be featured in the NAHRO calendar. This year, we will participate and encourage children in affordable housing programs to join. OC Housing & Community Development will spread the word and handle the details, including releases and organizing the selection process. The project will kick off in March or April, and submissions are due by May.**

S. Oddo: For the calendar contest, can you send us a description of who would be eligible to participate
J. Bidwell: Confirmed that a flyer is currently being produced and will be distributed upon completion

XI. MEMBER COMMENTS:

M. Frost: Apologized for running late to the meeting

J. Mai: Mentioned that he will continue serving until officially released. Mentioned it has been a pleasure working with all. Mentioned since his last meeting, he was elected to office and now serves as Vice Mayor of Irvine. He mentioned availability to represent Irvine if there's a vacancy. Thanked the staff and everyone and ended by mentioning it's been great learning about housing and helping people.

XII. ADJOURNMENT

Meeting Adjourned: 10:40 am

XIII. NEXT SCHEDULED MEETING:

February 27, 2025

OC Housing & Community Development

Conference Room A

1501 E. St. Andrew Pl, 1st Floor
Santa Ana, CA 92705

Item VII:

CONSENT CALENDAR

(None)

Item VIII:

DISCUSSION CALENDAR

1. Draft 5-Year and Annual Public Housing Agency (PHA) Plan for FY 2025



DYLAN WRIGHT
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Attachment - 1

DATE: February 27, 2025

TO: H&CD Commission

FROM: January Johnson, Manager, Housing Assistance

DS
JJ

SUBJECT: Draft 5-Year and Annual Public Housing Agency (PHA) Plan FY 2025

In compliance with United States Department of Housing and Urban Development (HUD) requirements, a Public Notice was published on February 7, 2025, advising the public that the Orange County Housing Authority’s (OCHA) Draft 5-Year and Annual PHA Plans (Plans) will be available for review online at OCHA’s website: www.ochousing.com/documents and that a Public Hearing would be conducted by the Orange County Board of Supervisors on March 24, 2025.

The H&CD Commission has appointed its members as the Resident Advisory Board (RAB) to provide oversight for the development of the Plans. Enclosed are the draft Plans for RAB consideration. OCHA will incorporate any applicable feedback from the RAB/H&CD Commission and the public for presentation to the Orange County Board of Supervisors acting as the Orange County Board of Commissioners on March 24, 2025. Following the Public Hearing, any further applicable comments will be included in the Plans for submittal to HUD by April 17, 2025.

RECOMMENDED ACTION

1. Direct Staff to receive and record comments

Attachment A – Draft 5-Year Public Housing Agency Plan FY2025-2029
Attachment B – Draft Annual Public Housing Agency Plan FY2025



5-Year PHA Plan (for All PHAs)	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires 09/30/2027
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Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals, and objectives for serving the needs of low-income, very low-income, and extremely low-income families.

Applicability. The Form HUD-50075-5Y is to be completed once every 5 PHA fiscal years by all PHAs.

A.	PHA Information.														
A.1	<p>PHA Name: Orange County Housing Authority PHA Code: CA094 PHA Plan for Fiscal Year Beginning: (MM/YYYY): 07/2025 The Five-Year Period of the Plan (i.e., 2019-2023): 2025-2029 Plan Submission Type <input checked="" type="checkbox"/> 5-Year Plan Submission <input type="checkbox"/> Revised 5-Year Plan Submission</p> <p>Availability of Information. In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information on the PHA policies contained in the standard Annual Plan, but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and the main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official websites. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p>How the public can access this PHA Plan: Orange County Housing Authority (CA094) Five-Year PHA Plan for FY 2025-2029 is available online located at: https://www.ochousing.org/documents-forms</p> <p><input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below.)</p> <table border="1" data-bbox="164 1087 1528 1146"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Program(s) not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV						
Participating PHAs	PHA Code					Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program							
		PH	HCV												
B.	Plan Elements. Required for all PHAs completing this form.														
B.1	<p>Mission. State the PHA's mission for serving the needs of low- income, very low- income, and extremely low- income families in the PHA's jurisdiction for the next five years.</p> <p>Orange County Housing Authority's Mission: OCHA's mission is to provide safe, decent and sanitary housing conditions for families with low, very low and extremely low-income and to manage resources efficiently. OCHA promotes personal, economic, and social upward mobility to provide families the opportunity to make the transition from subsidized to non-subsidized housing.</p>														
B.2	<p>Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low- income, very low-income, and extremely low-income families for the next five years.</p> <p>1. Maximize existing resources and expand supply of affordable housing. 2. Promote Family Self-Sufficiency. 3. Focus on enhancing internal capacity to guarantee the delivery of high-quality service. 4. Improve the quality of assisted housing. 5. Enhance equal access to housing programs by reducing barriers. 6. Maintain High Performer status on the Section Eight Management Assessment Program</p>														
B.3	<p>Progress Report. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan.</p> <p>See Attachment A B.3 Progress Report</p>														
B.4	<p>Violence Against Women Act (VAWA) Goals. Provide a statement of the PHA's goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking.</p>														

	OCHA complies with all VAWA requirements. Citations from OCHA's Administrative Plan, which speak to VAWA policy, are found in Attachment B of this Plan. In addition to the attached policy, OCHA makes Emergency Transfer Plan and domestic violence service provider information available to the public in person, and via mail, electronic mail and on the OCHA webpage.
C.	Other Document and/or Certification Requirements.
C.1	Significant Amendment or Modification. Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan. OCHA Statement Regarding Criteria for Significant Amendment or Modification to the 5-Year Plan: OCHA defines "significant amendment or modification" as any that meet all of the following criteria: • Is discretionary • Fundamentally alters the existing policies of the Housing Authority • Requires formal approval of the Board of Commissioners
C.2	Resident Advisory Board (RAB) Comments. (a) Did the RAB(s) have comments to the 5-Year PHA Plan? Y <input type="checkbox"/> N <input type="checkbox"/> (b) If yes, comments must be submitted by the PHA as an attachment to the 5-Year PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations
C.3	Certification by State or Local Officials. Form HUD-50077-SL, Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan, must be submitted by the PHA as an electronic attachment to the PHA Plan.
C.4	Required Submission for HUD FO Review. (a) Did the public challenge any elements of the Plan? Y <input type="checkbox"/> N <input type="checkbox"/> (b) If yes, include Challenged Elements.
D.	Affirmatively Furthering Fair Housing (AFFH).
D.1	Affirmatively Furthering Fair Housing. (Non-qualified PHAs are only required to complete this section on the Annual PHA Plan. All qualified PHAs must complete this section.) Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.

Form identification: CA094-Orange County Housing Authority form HUD-50075-5Y (Form ID - 254)

B.3 Progress Report

Progress Report 2020 to 2025

Goal #1 Open the Housing Choice Voucher Program Waiting List.

During the past five (5) year period OCHA completed the goal of opening the Housing Choice Voucher program waiting list.

- OCHA opened the Housing Choice Voucher Program waiting list for two weeks in September 2023.
- We received over 57,000 applications during that two-week period.
- To establish a waiting list that could be exhausted in approximately four years, depending upon funding availability, OCHA randomly selected 12,000 applicants from the 57,000 applications received.

Goal #2 Enhance accessibility for disabled and limited English proficient persons.

- OCHA's website was updated with the functionality to support translation from English into Arabic (check), Chinese, Farsi (check), Korean, Spanish and Vietnamese.
- OCHA entered a contract with Language Line Services to provide interpretation and translation services in 163 different languages during FY 2023/2024 and we maintained the contract through FY 2024/2025.
- OCHA continued to prioritize the hiring of bilingual staff who were competent in reading, writing, and speaking Chinese, Korean, Spanish, and Vietnamese to help to remove a barrier to information for limited English proficient persons. During the above period OCHA hired a total of 68 bilingual staff.
- American Sign Language interpreters and the California Relay Service were used to communicate with those who were hard of hearing.

Goal #3 Expand efforts to affirmatively further fair housing.

- OCHA routinely held collaborative meetings with partners for our Special Purpose Voucher programs where we educated partner agencies on Reasonable Accommodation options available that helped to provide actual choice for persons with disabilities.
- OCHA additionally collaborated with the other three (3) Orange County area housing authorities to establish a universal application for applicants referred from the Coordinated Entry System. Utilizing a universal application with universal required documents, helped to reduce challenges related to the application process. Additionally, OCHA routinely held training sessions on the use of the universal application for community service providers. Simplifying the application and application process for our most vulnerable applicants helped reduce barriers to our assistance programs.
- OCHA offered security deposit assistance for participants in Special Purpose Voucher homeless programs who did not have access to other funding opportunities. During the five (5) year evaluation period, OCHA provided 79 security deposits totaling \$143,903.
- OCHA conducted landlord engagement activities to provide education and outreach to area landlords on the Housing Choice Voucher Program.
- OCHA administered a landlord incentive program offering up to \$1,000 signing bonus for landlords, double security deposits and refrigerator assistance for tenants. The program was intended to complement existing community landlord incentive programs and support voucher holders with limited access to support service dollars. During the five (5) year evaluation period, OCHA provided 401 landlord incentives, security deposits, and refrigerator assistance payments totaling \$679,122.
- Extended search times were provided to allow program participants the time necessary to obtain sufficient information regarding their housing options to make an informed housing choice.
- OCHA continued to evaluate its expansion of efforts. Meanwhile, OCHA continues to comply with 24 Code of Federal Regulations (CFR) 5.150

Goal #4 Identify and utilize technology to enhance operational effectiveness and efficiency in delivery of housing assistance services.

- All new Housing Choice Voucher Program files continued to be digital.
- All newly created historical records continued to be imaged to prevent creation of physical files.
- The Assistance Connect portal continued to be available for applicant and landlord use to communicate with staff and transmit documents as needed.
- OCHA began a pilot program to allow community service providers access to the Assistance Connect portal to upload client documentation.
- DocuSign seats and Adobe Pro licenses continued to be utilized to eliminate need for original signatures.
- Remote Virtual Inspections use was expanded to include Biennial Inspections as well as new move-ins.
- OCHA continued to utilize virtual briefings and electronic reexaminations.
- Family Self-Sufficiency (FSS) briefings used a virtual briefing format which allowed a broader attendance level and a more interactive experience.
- Support for completion of electronic reexaminations and initial applications using smartphones provided to encourage the use of technology.

The public has the option of using the technologies provided but are not required to do so. Appointments for individual service are always available.

Goal #5 Expand the supply of affordable housing by applying for additional housing assistance funding and programs that may become available.

Over the past five (5) years, OCHA has applied for and received funding as follows:

- Veterans Affairs Supportive Housing (VASH) program

Year	Number of Vouchers	Funding
2022	30	\$458,341
2023	10	\$155,460

2024	10	\$168,348
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- Foster Youth to Independence Initiative

Year	Number of Vouchers	Funding
2023	25	\$446,166

- Mainstream Voucher Program

Year	Number of Vouchers	Funding
2020	24	\$438,994
2021	100	\$1,705,608
2022	50	\$1,705,608

- Emergency Housing Voucher program

Year	Number of Vouchers	Funding
2021	557	\$8,919,864

- Family Self-Sufficiency program

Year	Funding
2020	\$288,000
2021	\$429,864
2022	\$429,864
2023	\$429,864
2024	\$429,864*

- Continuum of Care program

Year	Funding
2020	\$12,012,780
2021	\$12,012,780
2022	\$12,062,004
2023	\$13,241,436
2024	\$13,241,436*

*Applied for not yet awarded.

Project Based Voucher (PBV) developments completed in five (5) year period:

Project Name	Number of Vouchers	Status
Placentia Veteran Village	49	Completed
Della Rosa	25	Completed
Salerno	25	Completed
Buena Esperanza	20	Completed
Altrudy	8	Completed
Westminster Crossing	20	Completed
Prado	8	Completed
Ascent	57	Completed
Casa Paloma	48	Completed
The Groves	8	Completed
Center of Hope	16	Completed
Iluma	70	Completed
Mountain View	8	Completed
Clara Vista	59	Completed
Mesa Vista	40	Completed
Valencia Gardens	8	Completed
Santa Angelina	21	Completed
Aurora Vista	20	Completed
Crossroads at Washington	43	Completed
Villa St. Joseph	18	Completed
Pelican Harbor	33	Completed
Orchard View	8	Completed
Salida del Sol	40	Completed
Total	652	

OCHA revised our Administrative Plan to allocate 50% of turnover vouchers, up to the 20% CAP allowable by HUD, dependent upon funding availability, and received Board of Commissioners approval of the change on January 23, 2024

Goal #6 Promote Family Self-Sufficiency (FSS)

- OCHA applied for and received FSS Coordinator funding each year over the past five (5) years (see Section B3, Goal #5).
- OCHA continued to participate in the national study of the FSS program conducted by MDRC through 2021.
- Since 2020, OCHA has graduated 36 households from the FSS program and disbursed more than \$421,318 in escrow funds to said households. Five (5) of the graduate households left the Housing Choice Voucher program and moved to unsubsidized housing.
- OCHA routinely conducts recruitment to all Housing Choice Voucher, Mainstream Voucher program and Emergency Housing Voucher program participants and invited 7,850 households to attend a FSS briefing over the past five (5) years.
- Participation in OCHA's FSS program is 36% higher than mandated by HUD.
- Approximately 38% of the households participating in the FSS program are those in the FUP and VASH programs

B.4 Violence Against Womens Act (VAWA)

If based on a criminal record or sex offender registration information, an applicant family appears to be ineligible, OCHA will notify the family in writing of the denial of admission. If the family does not contact OCHA to dispute the information within a 15-calendar day period, OCHA will finalize the denial of admission.

3-III.G. PROHIBITION AGAINST DENIAL OF ASSISTANCE TO VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE, AND STALKING [24 CFR PART 5, SUBPART L]

The Violence Against Women Act of 2013 (VAWA) and the HUD regulation at 24 CFR 5.2005(b) prohibit PHAs from denying an applicant admission to the HCV program “on the basis that the applicant is or has been a victim of domestic violence, dating violence, or stalking if the applicant otherwise qualifies for assistance or admission.

Definitions of key terms used in VAWA are provided in section 16-IX of this plan, where general VAWA requirements and policies pertaining to notification, documentation, and confidentiality are also located.

Notification

VAWA 2013 expanded notification requirements to include the obligation to provide applicants who are denied assistance with a VAWA Notice of Occupancy Rights (form HUD-53800 and a domestic violence certification form (HUD-5382) at the time the applicant is denied.

OCHA acknowledges that a victim of domestic violence, dating violence, or stalking may have an unfavorable history (e.g., a poor credit history, a record of previous damage to an apartment, a prior arrest record) that would warrant denial under OCHA’s policies. Therefore, if OCHA makes a determination to deny assistance to an applicant family, OCHA will include in its notice of denial the VAWA information described in section 16-IX.C of this plan and will request that an applicant wishing to claim protection under VAWA notify OCHA within 15 calendar days.

Documentation

Victim Documentation [24 CFR 5.2007]

If an applicant claims the protection against denial of assistance that VAWA provides to victims of domestic violence, dating violence, or stalking, OCHA will request in writing that the applicant provide documentation supporting the claim in accordance with section 16-IX.D of this plan.

Perpetrator Documentation

If the perpetrator of the abuse is a member of the applicant family, the applicant must provide additional documentation consisting of one of the following:

- A signed statement (1) requesting that the perpetrator be removed from the application and certifying that the perpetrator will not be permitted to visit or to stay as a guest in the assisted unit.
- Documentation that the perpetrator has successfully completed, or is successfully undergoing, rehabilitation or treatment. The documentation must be signed by an employee or agent of a domestic violence service provider or by a medical or other knowledgeable professional from whom the perpetrator has sought or is receiving assistance in addressing the abuse. The signer must attest under penalty of perjury to his or her belief that the rehabilitation was successfully completed or is progressing successfully. The victim and perpetrator must also sign or attest to the documentation.

- Where the family can lease a unit, including renting a unit inside or outside OCHA's jurisdiction.
- For families eligible under portability, an explanation of portability. OCHA will not discourage eligible families from moving under portability.
- For families living in high-poverty census tracts, an explanation of the advantages of moving to areas outside of high-poverty concentrations.

Briefing Packet [24 CFR 982.301(b)]

Documents and information provided in the briefing packet will include the following:

- The term of the voucher, and OCHA's policies on any extensions or suspensions of the term.
- The packet will explain how the family can request an extension.
- A description of the method used to calculate the housing assistance payment for a family, including how OCHA determines the payment standard for a family, how OCHA determines total tenant payment for a family, and information on the payment standard and utility allowance schedule.
- An explanation of how OCHA determines the maximum allowable rent for an assisted unit.
- Where the family may lease a unit. For a family that qualifies to lease a unit outside of OCHA's jurisdiction under portability procedures, the information will include an explanation of how portability works.
- The HUD-required tenancy addendum, which must be included in the lease.
- The form the family must use to request approval of tenancy (RTA), and a description of the procedure for requesting approval for a tenancy.
- A statement of OCHA's policy on providing information about families to prospective owners.
- OCHA subsidy standards including when and how exceptions are made.
- The HUD brochure on how to select a unit.
- The HUD pamphlet on lead-based paint entitled Protect Your Family from Lead in Your Home.
- Information on federal, state and local equal opportunity laws and a copy of the housing discrimination complaint form.
- A list of owners or other parties willing to lease to assisted families or help families find units, especially outside areas of poverty or minority concentration.
- Notice that if the family includes a person with disabilities, the family may request a list of available accessible units known to OCHA.
- The family obligations under the program.
- The grounds on which OCHA may terminate assistance for a participant family because of family action or failure to act. (See 5-1.C Family Obligations)

- OCHA informal hearing procedures including when OCHA is required to offer a participant family the opportunity for an informal hearing, and how to request the hearing.
- Maps showing areas with housing opportunities outside areas of poverty or minority concentration, both within its jurisdiction and its neighboring jurisdiction.
- Information about the characteristics of these areas including job opportunities, schools, transportation and other services.
- An explanation of how portability works, including a list of portability contact persons for neighboring PHAs with names, addresses, and telephone numbers.
- Information about the protections afforded by the Violence against Women Act of 2005 (VAWA) to victims of domestic violence, dating violence, and stalking (see section 16-IX.C)
- “Is Fraud Worth It?” (form HUD-1141-OIG), which explains the types of actions a family must avoid and the penalties for program abuse.
- “What You Should Know about EIV,” a guide to the Enterprise Income Verification (EIV) system published by HUD as an attachment to Notice PIH 2010-19.

5-I.C. FAMILY OBLIGATIONS

Obligations of the family are described in the HCV program regulations and on the voucher itself. These obligations include responsibilities the family is required to fulfill, as well as prohibited actions. OCHA will inform families of these obligations during the oral briefing, and the same information will be included in the briefing packet. When the family’s unit is approved and the HAP contract is executed, the family must meet those obligations in order to continue participating in the program. Violation of any family obligation may result in termination of assistance, as described in Chapter 12.

Time Frames for Reporting Changes Required by Family Obligations

Unless otherwise noted below, when family obligations require the family to respond to a request or notify OCHA of a change, notifying OCHA of the request or change within 15 calendar days is considered prompt notice.

When a family is required to provide notice to OCHA, the notice must be in writing.

Family Obligations [24 CFR 982.551]

Following is a listing of a participant family’s obligations under the HCV program:

- The head of household (and spouse/co-mate) is responsible for reporting all family member changes in writing within 15 days of the occurrence. Forms to report changes are available at the OCHA office and at www.ochousing.org.
- The head of household (and spouse/co-mate) is responsible for reporting changes and will be required to repay the OCHA any overpayments of assistance made on behalf of the family as a result of not reporting changes that affect the amount of assistance received.
- Changes include increases and/or decreases in any source of income, benefits, child support, self-employment, cash, money received from family or friends, lottery or gambling winnings, loans, lump sums, or any other sources of money. Changes also include the start or end of

PART I: THE LEASE-UP PROCESS

9-I.A. TENANT SCREENING

OCHA has no liability or responsibility to the owner or other persons for the family's behavior or suitability for tenancy [24 CFR 982.307(a)(1)].

The owner is responsible for screening and selection of the family to occupy the owner's unit. At or before OCHA approval of the tenancy, OCHA will inform the owner that screening and selection for tenancy is the responsibility of the owner [24 CFR 982.307(a)(2)]. OCHA will also inform the owner or manager of his/her rights and obligations under the Violence against Women Act of 2005 VAWA [24 CFR 5.2005(a)(2)].

OCHA may provide the owner with the family's current and prior address (as shown in OCHA records); and the name and address (if known to OCHA) of the owner at the family's current and prior address [24 CFR 982.307 (b)(1)].

OCHA's policy on providing information to the owner must be included in the family's briefing packet [24 CFR 982.307(b)(3)].

OCHA may not disclose to the owner any confidential information provided in response to OCHA's request for documentation of domestic violence, dating violence, or stalking except at the written request or with the written consent of the individual providing the documentation [24 CFR 5.2007(b)(4)].

OCHA will not screen applicants for family behavior or suitability for tenancy.

OCHA will not provide additional screening information to the owner.

9-I.B. REQUESTING TENANCY APPROVAL [FORM HUD-52517]

After the family is issued a voucher, the family must locate an eligible unit, with an owner willing to participate in the HCV program. Once a family finds a suitable unit and the owner is willing to lease the unit under the program, the owner and the family must request OCHA to approve the assisted tenancy in the selected unit.

The owner and the family must submit a completed Request for Tenancy Approval (RTA) Form HUD-52517:

- The RTA contains important information about the rental unit selected by the family, including the unit address, number of bedrooms, structure type, year constructed, utilities included in the rent, and the requested beginning date of the lease, necessary for OCHA to determine whether to approve the assisted tenancy in this unit.
- Owners must certify to the most recent amount of rent charged for the unit and provide an explanation for any difference between the prior rent and the proposed rent.
- Owners must certify that they are not the parent, child, grandparent, grandchild, sister or brother of any member of the family, unless OCHA has granted a request for reasonable accommodation for a person with disabilities who is a member of the tenant household.

For units constructed prior to 1978, owners must either 1) certify that the unit, common areas, and exterior have been found to be free of lead-based paint by a certified inspector; or 2) attach a lead-based paint disclosure statement.

The RTA must be submitted no later than the expiration date stated on the voucher [HCV

PART II: PORTABILITY

10-II.A. OVERVIEW

Within the limitations of the regulations and this plan, a participant family or an applicant family that has been issued a voucher has the right to use tenant-based voucher assistance to lease a unit anywhere in the United States providing that the unit is located within the jurisdiction of a PHA administering a tenant-based voucher program [24 CFR 982.353(b)]. The process by which a family obtains a voucher from one PHA and uses it to lease a unit in the jurisdiction of another PHA is known as portability. The first PHA is called the *initial PHA*. The second is called the *receiving PHA*.

The receiving PHA has the option of (1) administering the family's voucher for the initial PHA or (2) absorbing the family into its own program. Under the first option, the receiving PHA bills the initial PHA for the family's housing assistance payments and the fees for administering the family's voucher. Under the second option, the receiving PHA pays for the family's assistance out of its own program funds, and the initial PHA has no further relationship with the family.

The same PHA commonly acts as the initial PHA for some families and as the receiving PHA for others. Each role involves different responsibilities. OCHA will follow the rules and policies in section 10-II.B. when it is acting as the initial PHA for a family. It will follow the rules and policies in section 10-II.C when it is acting as the receiving PHA for a family.

10-II.B. OCHA AS INITIAL PHA

Allowable Moves under Portability

A family may move with HCV program assistance only to an area where there is at least one PHA administering the HCV program [24 CFR 982.353(b)]. If there is more than one PHA in the area, the family will choose the receiving PHA. [24 CFR 982.355(b)].

Applicant families that have been issued vouchers, as well as participant families, may qualify to lease a unit outside OCHA's jurisdiction under portability. OCHA as the initial PHA, in accordance with HUD regulations and OCHA policy, determines whether a family qualifies.

Applicant Families

Under HUD regulations, most applicant families qualify to lease a unit outside OCHA's jurisdiction under portability. However, HUD gives OCHA discretion to deny a portability move by an applicant family for the same two reasons that it may deny any move by a participant family: insufficient funding and grounds for denial or termination of assistance. If OCHA intends to deny a family permission to move under portability due to insufficient funding, OCHA will notify HUD within 10 business days of the determination to deny the move [24 CFR 982.355(e)].

In determining whether or not to deny an applicant family permission to move under portability because OCHA lacks sufficient funding or has grounds for denying assistance to the family, OCHA as the initial PHA will follow the policies established in section 10-I.B. of this chapter. If neither the head of household nor the spouse/co-head of an applicant family had a legal residence in OCHA's jurisdiction at the time the family's application for assistance was submitted, the family must live in OCHA's jurisdiction with voucher assistance for at least 12 months before requesting portability.

OCHA will consider exceptions to this policy for purposes of reasonable accommodation (see Chapter 2) or reasons related to domestic violence, dating violence, or stalking. However, any

exception to this policy is subject to the approval of OCHA [24 CFR 982.353(c)(3)].

Participant Families

OCHA as the initial PHA will not provide portable assistance for a participant family that has moved out of its assisted unit in violation of the lease [24 CFR 982.353(b)]. The Violence against Women Act (VAWA) creates an exception to this prohibition for families who are otherwise in compliance with program obligations but have moved to protect the health or safety of a family member who is or has been a victim of domestic violence, dating violence or stalking and who reasonably believed he or she was imminently threatened by further violence if he or she remained in the unit [24 CFR 982.353(b)].

OCHA will determine whether a participant family may move out of OCHA's jurisdiction with continued assistance in accordance with the regulations and policies set forth here and in sections 10-I.A and 10-I.B of this chapter. OCHA will notify the family of its determination in accordance with the approval policy set forth in section 10-I.C of this chapter.

Determining Income Eligibility

Applicant Families

An applicant family may lease a unit in a particular area under portability only if the family is income eligible for admission to the voucher program in that area [24 CFR 982.353(d)(1)]. The family must specify the area to which the family wishes to move [24 CFR 982.355(c)(1)].

OCHA as the initial PHA is responsible for determining whether the family is income eligible in the area to which the family wishes to move [24 CFR 982.355(d)(1)]. If the applicant family is not income eligible in that area, OCHA will inform the family that it may not move there and receive voucher assistance [Notice PIH 2016-09].

Participant Families

The income eligibility of a participant family is not re-determined if the family moves to a new jurisdiction under portability [24 CFR 982.353(d)(2)].

Reexamination of Family Income and Composition

No interim reexamination of family income and composition will be performed.

Briefing

No formal briefing will be required for a participant family wishing to move outside OCHA's jurisdiction under portability. However, OCHA as the initial PHA will provide the family with the same oral and written explanation of portability that it provides to applicant families selected for admission to the program (see Chapter 5). OCHA will provide the name, address, and phone of the contact for the PHA in the jurisdiction to which they wish to move. OCHA will advise the family that they will be under the receiving housing authority's policies and procedures, including subsidy standards and voucher extension policies.

Voucher Issuance and Term

For families approved to move under portability, OCHA will issue a voucher or use the existing voucher to port-out within 15 calendar days of HAP contract termination date. The total term of the voucher will be 120 days (see Chapter 5).

Consideration of Circumstances [24 CFR 982.552(c)(2)(i)]

OCHA will consider the following factors when making its decision to terminate assistance:

- The seriousness of the case, especially with respect to how it would affect other residents.
- The effects that termination of assistance may have on other members of the family who were not involved in the action or failure.
- The extent of participation or culpability of individual family members, including whether the culpable family member is a minor or a person with disabilities or
- (as discussed further in section 12-II.E.) a victim of domestic violence, dating violence, or stalking.
- The length of time since the violation occurred, the family's recent history and the likelihood of favorable conduct in the future.
- In the case of drug (including medical marijuana) or alcohol abuse, whether the culpable household member is participating in or has successfully completed a supervised drug or alcohol rehabilitation program or has otherwise been rehabilitated successfully.
- In the case of domestic violence by a household member who is no longer engaged in such behavior, whether the culpable household has successfully completed a supervised anger management program or has otherwise been rehabilitated successfully.
- OCHA will require the participant to submit evidence of the household member's successful completion of a supervised drug or alcohol rehabilitation program, or a supervised anger management program, or evidence of otherwise having been rehabilitated successfully.
- In the case of program abuse, the dollar amount of the overpaid assistance and whether or not a false certification was signed by the family.

Reasonable Accommodation [24 CFR 982.552(c)(2)(iv)]

If a family indicates that the behavior of a family member with a disability is the reason for a proposed termination of assistance, OCHA will determine whether the behavior is related to the disability. If so, upon the family's request, OCHA will determine whether alternative measures are appropriate as a reasonable accommodation. OCHA will only consider accommodations that can reasonably be expected to address the behavior that is the basis of the proposed termination of assistance. See Chapter 2 for a discussion of reasonable accommodation.

12-II.E. TERMINATIONS RELATED TO DOMESTIC VIOLENCE, DATING VIOLENCE, OR STALKING]

This section addresses the protections against termination of assistance that the Violence against Women Act of 2005 (VAWA) provides for victims of domestic violence, dating violence, and stalking. For general VAWA requirements and OCHA policies pertaining to notification, documentation, and confidentiality see section 16-IX of this plan, where definitions of key VAWA terms are also located.

VAWA Protections against Termination

VAWA provides four specific protections against termination of HCV assistance for victims of domestic violence, dating violence, or stalking. (Note: The second, third, and fourth protections also apply to terminations of tenancy or occupancy by owners participating in the HCV program. So do the limitations discussed under the next heading.)

First, VAWA provides that OCHA may not terminate assistance to a family that moves out of an assisted unit in violation of the lease, with or without prior notification to OCHA, if the move occurred to protect the health or safety of a family member who is or has been the victim of domestic violence, dating violence, or stalking and who reasonably believed he or she was imminently threatened by harm from further violence if he or she remained in the unit [24 CFR 982.314(b)(4)].

Second, it provides that an incident or incidents of actual or threatened domestic violence, dating violence, or stalking may not be construed either as a serious or repeated lease violation by the victim or as good cause to terminate the assistance of the victim [24 CFR 5.2005(c)(1)].

Third, it provides that criminal activity directly related to domestic violence, dating violence, or stalking may not be construed as cause for terminating the assistance of a tenant if a member of the tenant's household, a guest, or another person under the tenant's control is the one engaging in the criminal activity and the tenant or an immediate family member of the tenant is the actual or threatened victim of the domestic violence, dating violence, or stalking [24 CFR 5.2005(c)(2)].

Fourth, it gives OCHA the authority to terminate assistance to any tenant or lawful occupant who engages in criminal acts of physical violence against family members or others without, terminating assistance to, or otherwise penalizing the victim of the violence. [24 CFR 5.2009(a)].

Limitations on VAWA Protections [24 CFR 5.2005(d) and (e)]

VAWA does not limit the authority of OCHA to terminate the assistance of a victim of abuse for reasons unrelated to domestic violence, dating violence, or stalking so long as OCHA does not subject the victim to a more demanding standard than it applies to other program participants [24 CFR 5.2005(d)(1)].

Likewise, VAWA does not limit the authority of OCHA to terminate the assistance of a victim of domestic violence, dating violence, or stalking if OCHA can demonstrate an actual and imminent threat to other tenants or those employed at or providing service to the assisted property if the victim is not terminated from assistance. [24CFR 5.2005(d)(2)].

HUD regulations define actual and imminent threat to mean words, gestures, actions, or other indicators of a physical threat that (a) is real, (b) would occur within an immediate time frame, and (c) could result in death or serious bodily harm [24 CFR 5.2005(d)(2) and (e)]. In determining whether an individual would pose an actual and imminent threat, the factors to be considered include:

- The duration of the risk
- The nature and severity of the potential harm

- The likelihood that the potential harm will occur
- The length of time before the potential harm would occur [24 CFR 5.2005(e)]

Even when a victim poses an actual and imminent threat, however, HUD regulations authorize OCHA to terminate the victim's assistance "only when there are no other actions that could be taken to reduce or eliminate the threat" [24 CFR 5.2005(d)(3)].

In determining whether a program participant who is a victim of domestic violence, dating violence, or stalking is an actual and imminent threat to other tenants or those employed at or providing service to a property, OCHA will consider the following, and any other relevant, factors:

- Whether the threat is toward an employee or tenant other than the victim of domestic violence, dating violence, or stalking.
- Whether the threat is a physical danger beyond a speculative threat.
- Whether the threat is likely to happen within a short period of time.
- Whether the threat to other tenants or employees can be eliminated in some other way, such as by helping the victim relocate to a confidential location or seeking a legal remedy to prevent the perpetrator from acting on the threat.

If the participant wishes to contest OCHA's determination that he or she is an actual and imminent threat to other tenants or employees, the participant may do so as part of the informal hearing.

Documentation of Abuse [24 CFR 5.2007]

When an individual facing termination of assistance for reasons related to domestic violence, dating violence, or stalking claims protection under VAWA, OCHA will request that the individual provide documentation supporting the claim in accordance with the policies in section 16-IX.D. of this plan.

OCHA reserves the right to waive the documentation requirement if it determines that a statement or other corroborating evidence from the individual will suffice. In such cases OCHA will document the waiver in the individual's file.

Terminating the Assistance of a Domestic Violence Perpetrator

Although VAWA provides protection against termination of assistance for victims of domestic violence, it does not provide such protection for perpetrators. VAWA gives OCHA the explicit authority to "terminate assistance to any individual who is a tenant or lawful occupant and who engages in criminal acts of physical violence against family members or others" without terminating assistance to "or otherwise penalizing the victim of such violence who is also a tenant or lawful occupant." [24 CFR 5.2009(a)] This authority is not dependent on a bifurcated lease or other eviction action by an owner against an individual family member. Further, this authority supersedes any local, state, or other federal law to the contrary. However, if OCHA chooses to exercise this authority, it must follow any procedures prescribed by HUD or by applicable local, state, or federal law regarding termination of assistance. This means that OCHA will follow the same rules when terminating assistance to an individual as it would when terminating the assistance of an entire family [3/16/07 *Federal Register* notice on the applicability of VAWA to HUD programs].

OCHA will terminate assistance to a family member if OCHA determines that the family member has committed criminal acts of physical violence against other family members or others. This action will not affect the assistance of the remaining, nonculpable family members.

In making its decision, OCHA will consider all credible evidence, including, but not limited to, a signed certification (form HUD-50066) or other documentation of abuse submitted to OCHA by the victim in accordance with this section and section 16-IX.D. OCHA will also consider the factors in section 12-II.D. Upon such consideration, OCHA may, on a case-by-case basis, choose not to terminate the assistance of the culpable family member.

If OCHA does terminate the assistance of the culpable family member, it will do so in accordance with applicable law, HUD regulations, and the policies in this plan.

12-II.F. TERMINATION NOTICE

HUD regulations require OCHA to provide written notice of termination of assistance to a family only when the family is entitled to an informal hearing. However, since the family's HAP contract and lease will also terminate when the family's assistance terminates [form HUD- 52641], it is a good business practice to provide written notification to both owner and family anytime assistance will be terminated, whether voluntarily or involuntarily.

Whenever a family's assistance will be terminated, OCHA will send a written notice of termination to the family and to the owner of the family's unit. The notice will state the date on which the termination will become effective. This date generally will be at least 30 calendar days following the date of the termination notice, but exceptions will be made whenever HUD rules, other OCHA policies, or the circumstances surrounding the termination require. The notice will include the reasons for which assistance has been terminated.

When OCHA notifies an owner that a family's assistance will be terminated, OCHA will, if appropriate, advise the owner of his/her right to offer the family a separate, unassisted lease.

If a family whose assistance is being terminated is entitled to an informal hearing, the notice of termination that OCHA sends to the family will meet the additional HUD and OCHA notice requirements discussed in section 16-III.C of this plan.

Whenever OCHA decides to terminate a family's assistance because of the family's action or failure to act, OCHA will include in its termination notice the VAWA information described in section 16-IX.C of this plan and will request that a family member wishing to claim protection under VAWA notify OCHA within 15 calendar days.

Still other notice requirements apply in two situations:

- If a criminal record is the basis of a family's termination, a copy of the record will accompany (or proceed) the termination notice, and a copy of the record will also be provided to the subject of the record [24 CFR982.553(d)].
- If immigration status is the basis of a family's termination, as discussed in section 12- I.D, the special notice requirements in section 16-III.D will be followed.

12-III.D. DECIDING WHETHER TO TERMINATE TENANCY [24 CFR 982.310(H), 24 CFR 982.310(H)(4)]

An owner who has grounds to terminate a tenancy is not required to do so, and may consider all of the circumstances relevant to a particular case before making a decision. These might include:

- The nature of the offending action.
- The seriousness of the offending action.
- The effect on the community of the termination, or of the owner's failure to terminate the tenancy.
- The extent of participation by the leaseholder in the offending action.
- The effect of termination of tenancy on household members not involved in the offending activity.
- The demand for assisted housing by families who will adhere to lease responsibilities.
- The extent to which the leaseholder has shown personal responsibility and taken all reasonable steps to prevent or mitigate the offending action.
- The effect of the owner's action on the integrity of the program.

The owner may require a family to exclude a household member in order to continue to reside in the assisted unit, where that household member has participated in or been culpable for action or failure to act that warrants termination.

In determining whether to terminate tenancy for illegal use of drugs (including medical marijuana) or alcohol abuse by a household member who is no longer engaged in such behavior, the owner may consider whether such household member is participating in or has successfully completed a supervised drug or alcohol rehabilitation program, or has otherwise been rehabilitated successfully (42 U.S.C. 13661). For this purpose, the owner may require the tenant to submit evidence of the household member's current participation in, or successful completion of, a supervised drug or alcohol rehabilitation program or evidence of otherwise having been rehabilitated successfully.

The owner's termination of tenancy actions must be consistent with the fair housing and equal opportunity provisions in 24 CFR 5.105.

An owner's decision to terminate tenancy for incidents related to domestic violence, dating violence, or stalking is limited by the Violence against Women Act of 2005 (VAWA) and the confirming regulations in 24 CFR Part 5, Subpart L. (See section 12-II.E.)

12-III.E. EFFECT OF TENANCY TERMINATION ON THE FAMILY'S ASSISTANCE

If a termination is not due to a serious or repeated violation of the lease, and if OCHA has no other grounds for termination of assistance, OCHA may issue a new voucher so that the family can move with continued assistance (see Chapter 10).

behavior or suitability for tenancy. See Chapters 3 and 9 for more detail on tenant family screening policies and process.

If the owner is willing, the family and the owner must jointly complete a Request for Tenancy Approval (RTA) (Form HUD 52517), which constitutes the family's request for assistance in the specified unit, and which documents the owner's willingness to lease to the family and to follow the program's requirements. When submitted to OCHA, this document is the first step in the process of obtaining approval for the family to receive the financial assistance it will need in order to occupy the unit. See Chapter 9 for more detail on request for tenancy approval policies and process.

HUD regulations stipulate that an assisted tenancy can be approved only under certain conditions.

The owner must be qualified to participate in the HCV program [24 CFR 982.306]. Some owners are precluded from participating in the program, or from renting to a particular family, either because of their past history with this or another federal housing program, or because of certain conflicts of interest. Owner qualifications are discussed later in this chapter.

The selected unit must be of a type that is eligible for the program [24 CFR 982.305(a)]. Certain types of dwelling units cannot be assisted under the HCV program. Other types may be assisted under certain conditions. In addition, the owner must document legal ownership of the specified unit. See chapter 9 for more detail on unit eligibility policies and process.

The selected unit must meet HUD's Housing Quality Standards (HQS) and/or equivalent state or local standards approved by HUD [24 CFR 982.305(a)]. OCHA will inspect the owner's dwelling unit at various stages of HCV program participation, to ensure that the unit continues to meet HQS requirements. See Chapter 8 for a discussion of the HQS standards, as well as, the process for HQS inspections at initial lease-up and throughout the family's tenancy.

OCHA must determine that the cost of the unit is reasonable [24 CFR 982.305(a)]. The rent must be reasonable in relation to comparable unassisted units in the area and must not be in excess of rents charged by the owner for comparable, unassisted units on the premises. See Chapter 8 for a discussion of requirements and policies on rent reasonableness, rent comparability, and the rent reasonableness determination process.

At initial lease-up of a unit, OCHA must determine that the share of rent to be paid by the family does not exceed 40 percent of the family's monthly-adjusted income [24 CFR 982.305(a)]. See Chapter 6 for a discussion of the calculation of family income, family share of rent, and HAP.

The dwelling lease must comply with all HCV program requirements [24 CFR 982.308]. Owners are encouraged to use their standard leases when renting to an assisted family. However, the HCV program requires that the Tenancy Addendum, which helps standardize the tenancy requirements for all assisted families, be added word-for-word to that lease or included as an attachment. See Chapter 9 for a discussion of the dwelling lease and tenancy addendum, including lease terms and provisions.

OCHA and the owner enter into a formal contractual relationship by executing the Housing Assistance Payment (HAP) contract (Form HUD-52641). HUD prescribes the HAP contract format. See Chapter 9 for a discussion of the HAP contract execution process. Specific HAP contract provisions and responsibilities are discussed later in this chapter.

13-I.C. OWNER RESPONSIBILITIES [24 CFR 982.452,]

The basic owner responsibilities in the HCV program are outlined in the regulations as follows:

- Performing all of the owner's obligations under the housing assistance payments (HAP) contract and the lease.
- Performing all management and rental functions for the assisted unit, including selecting a voucher-holder to lease the unit, and deciding if the family is suitable for tenancy of the unit.
- Maintaining the unit in accordance with the Housing Quality Standards (HQS), including performance of ordinary and extraordinary maintenance.
- Complying with equal opportunity requirements.
- Preparing and furnishing to OCHA information required under the HAP contract.
- Collecting from the family any security deposit, the tenant's contribution to rent (that part of rent to owner not covered by the housing assistance payment from OCHA), and any charges for unit damage by the family.
- Enforcing tenant obligations under the dwelling lease.
- Paying for utilities and services (unless paid by the family under the lease).

Making modifications to a dwelling unit occupied or to be occupied by a disabled person [24 CFR 100.203]. Complying with the Violence against Women Act of 2005 (VAWA) when screening prospective HCV tenants or terminating the tenancy of an HCV family (see 24 CFR Part 5, Subpart L; 24 CFR 982.310(h)(4); and 24 CFR 982.452(b)(1)).

13-I.D. OWNER QUALIFICATIONS

OCHA does not formally approve an owner to participate in the HCV program. However, there are a number of criteria where OCHA may deny approval of an assisted tenancy based on past owner behavior, conflict of interest, or other owner-related issues. No owner has a right to participate in the HCV program [24 CFR 982.306(e)].

Owners Barred from Participation [24 CFR 982.306(a) and (b)]

OCHA will not approve the assisted tenancy if OCHA has been informed that the owner has been debarred, suspended, or subject to a limited denial of participation under 24 CFR part 24. HUD may direct OCHA not to approve a tenancy request if a court or administrative agency has determined that the owner violated the Fair Housing Act or other federal equal opportunity requirements, or if such an action is pending.

Leasing to Relatives [24 CFR 982.306(d), HCV GB p. 11-2]

OCHA will not approve an RTA if the owner is the parent, child, grandparent, grandchild, sister, or brother of any member of the family. OCHA may make an exception as a reasonable accommodation for a family member with a disability. The owner is required to certify that no such relationship exists. This restriction applies at the time that the family receives assistance under the HCV program for occupancy of a particular unit. Current contracts on behalf of owners

PART IX: VIOLENCE AGAINST WOMEN ACT OF 2005 (VAWA): NOTIFICATION, DOCUMENTATION, AND CONFIDENTIALITY

16-IX.A. OVERVIEW

The Violence against Women Act of 2005 (VAWA) provides special protections for victims of domestic violence, dating violence, and stalking who are applying for or receiving assistance under the housing choice voucher (HCV) program. If state or local laws provide greater protection for such victims, those laws take precedence over VAWA.

In addition to definitions of key terms used in VAWA, this part contains general VAWA requirements and OCHA policies in three areas: notification, documentation, and confidentiality. Specific VAWA requirements and OCHA policies are located primarily in the following sections: 3-I.C, “Family Breakup and Remaining Member of Tenant Family”; 3-III.G, “Prohibition against Denial of Assistance to Victims of Domestic Violence, Dating Violence, and Stalking”; 10-I.A, “Allowable Moves”; 10-I.B, “Restrictions on Moves”; 12-II.E, “Terminations Related to Domestic Violence, Dating Violence, or Stalking”; and 12-II.F, “Termination Notice.”

16-IX.B. DEFINITIONS [24 CFR 5.2003, 42 USC 13925]

As used in VAWA:

- The term *bifurcate* means, with respect to a public housing or Section 8 lease, to divide a lease as a matter of law such that certain tenants can be evicted or removed while the remaining family members’ lease and occupancy rights are allowed to remain intact.
- The term *dating violence* means violence committed by a person who is or has been in a social relationship of a romantic or intimate nature with the victim; and where the existence of such a relationship shall be determined based on a consideration of the following factors:
 - The length of the relationship
 - The type of relationship
 - The frequency of interaction between the persons involved in the relationship
- The term *domestic violence* includes felony or misdemeanor crimes of violence committed by a current or former spouse of the victim, by a person with whom the victim shares a child in common, by a person who is cohabitating with or has cohabitated with the victim as a spouse, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person’s acts under the domestic or family violence laws of the jurisdiction.
 - The term *affiliated individual* means, with respect to a person: A spouse, parent, brother or sister, or child of that individual, or an individual to whom that individual stands in the position or place of a parent; or
 - Any other individual, tenant, or lawful occupant living in the household of the victim of domestic violence, dating violence, sexual assault, or stalking.
- The term *sexual assault* means:
 - Any nonconsensual sexual act proscribed by federal, tribal, or state law, including when the victim lacks the capacity to consent.

- The term *stalking* means:
 - To engage in a course of conduct directed at a specific person that would cause a reasonable person to fear for his or her safety or the safety of others, or suffer substantial emotional distress.

16-IX.C. NOTIFICATION [24 CFR 5.2005(a)]

Notification to Public

OCHA adopts the following policy to help ensure that all actual and potential beneficiaries of its HCV program are aware of their rights under VAWA.

OCHA will post the following information regarding VAWA in its offices and on its Web site. It will also make the information readily available to anyone who requests it.

- A summary of the rights and protections provided by VAWA to HCV program applicants and participants who are or have been victims of domestic violence, dating violence, or stalking.
- An explanation of the documentation that OCHA may require from an individual who claims the protections provided by VAWA.
- A copy of form HUD-50066, Certification of Domestic Violence, Dating Violence, or Stalking.
- A statement of OCHA's obligation to keep confidential any information that it receives from a victim unless (a) OCHA has the victim's written permission to release the information, (b) it needs to use the information in an eviction proceeding, or (c) it is compelled by law to release the information.
- The National Domestic Violence Hot Line: 1-800-799-SAFE (7233) or 1-800-787-3224 (TTY) (included in Exhibits 16-1 and 16-2).
- Contact information for local victim advocacy groups or service providers.

Notification to Program Applicants and Participants [24 CFR 5.2005(a)(1)]

PHAs are required to inform program participants of their rights under VAWA, including their right to confidentiality and the limits thereof. Since VAWA provides protections for applicants as well as participants, PHAs may elect to provide the same information to applicants.

OCHA will provide all participants with notification of their protections and rights under VAWA at the time of admission and at annual reexamination. OCHA will also include information about VAWA in all notices of denial of assistance (see section 3-III.G).

The VAWA information provided to applicants and participants will consist of the notice in Exhibit 16-1 and a copy of form HUD-50066, Certification of Domestic Violence, Dating Violence, and Stalking.

16-IX.D. DOCUMENTATION [24 CFR 5.2007]

A PHA presented with a claim for initial or continued assistance based on status as a victim of domestic violence, dating violence, stalking, or criminal activity related to any of these forms of abuse may—but is not required to—request that the individual making the claim document the abuse. Any request for documentation must be in writing, and the individual must be allowed at least 14 business days after receipt of the request to submit the

documentation. OCHA may extend this time period at its discretion. [24 CFR 5.2007(a)]

The individual may satisfy OCHA's request by providing any one of the following three forms of documentation [24 CFR 5.2007(b)]:

- (1) A completed and signed HUD-approved certification form (HUD-5382, Certification of Domestic Violence, Dating Violence, or Stalking), which must include the name of the perpetrator
- (2) A federal, state, tribal, territorial, or local police report or court record
- (3) Documentation signed by a person who has assisted the victim in addressing domestic violence, dating violence, or stalking, or the effects of such abuse. This person may be an employee, agent, or volunteer of a victim service provider; an attorney; or a medical professional. The person signing the documentation must attest under penalty of perjury to the person's belief that the incidents in question are bona fide incidents of abuse. The victim must also sign the documentation.

OCHA may not require third-party documentation (forms 2 and 3) in addition to certification (form 1), except as specified below under "Conflicting Documentation," nor may it require certification in addition to third-party documentation [VAWA final rule].

Any request for documentation of domestic violence, dating violence, or stalking will specify a deadline of 14 business days following receipt of the request, will describe the three forms of acceptable documentation, will provide explicit instructions on where and to whom the documentation must be submitted, and will state the consequences for failure to submit the documentation or request an extension in writing by the deadline. OCHA may, in its discretion, extend the deadline for 10 business days. Any extension granted by OCHA will be in writing.

Conflicting Documentation [24 CFR 5.2007(e), Notice PIH 2017-08]

In cases where OCHA receives conflicting certification documents from two or more members of a household, each claiming to be a victim and naming one or more of the other petitioning household members as the perpetrator, OCHA may determine which is the true victim by requiring each to provide acceptable third-party documentation, as described above (forms 2 and 3). OCHA will honor any court orders issued to protect the victim or to address the distribution of property.

If presented with conflicting certification documents (two or more forms HUD-5382) from members of the same household, OCHA will attempt to determine which is the true victim by requiring each of them to provide third-party documentation in accordance with 24 CFR 5.2007(b)(2) or (3) and by following any HUD guidance on how such determinations should be made.

Discretion to Require No Formal Documentation [24 CFR 5.2007(d)]

OCHA has the discretion to provide benefits to an individual based solely on the individual's statement or other corroborating evidence—i.e., without requiring formal documentation of abuse in accordance with 24 CFR 5.2007(b).

If OCHA accepts an individual's statement or other corroborating evidence of domestic violence, dating violence, or stalking, OCHA will document acceptance of the statement or evidence in the individual's file.

Failure to Provide Documentation [24 CFR 5.2007(c)]

In order to deny relief for protection under VAWA, OCHA will provide the individual requesting relief with a written request for documentation of abuse. If the individual fails to provide the documentation within 14 business days from the date of receipt, or such longer time as OCHA may allow, OCHA may deny relief for protection under VAWA.

16-IX.E. CONFIDENTIALITY [24 CFR 5.2007(b)(4)]

All information provided to OCHA regarding domestic violence, dating violence, or stalking, including the fact that an individual is a victim of such violence or stalking, will be retained in confidence. This means that OCHA (1) may not enter the information into any shared database, (2) may not allow employees or others to access the information unless they are explicitly authorized to do so and have a need to know the information for purposes of their work, and (3) may not provide the information to any other entity or individual, except to the extent that the disclosure is (a) requested or consented to by the individual in writing, (b) required for use in an eviction proceeding, or (c) otherwise required by applicable law.

If disclosure is required for use in an eviction proceeding or is otherwise required by applicable law, OCHA will inform the victim before disclosure occurs so that safety risks can be identified and addressed.

Streamlined Annual PHA Plan (High Performer PHAs)	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires 09/30/2027
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Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, including changes to these policies, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

Applicability. The Form HUD-50075-HP is to be completed annually by **High Performing PHAs**. PHAs that meet the definition of a Standard PHA, Troubled PHA, HCV-Only PHA, Small PHA, or Qualified PHA do not need to submit this form.

Definitions.

- (1) **High-Performer PHA** - A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers and was designated as a high performer on both the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAP) assessments.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP troubled, that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceed 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAP assessment and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550, and that was designated as a standard performer in the most recent PHAS or SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined and is not PHAS or SEMAP troubled.

A.	PHA Information.														
A.1	<p>PHA Name: <u>Orange County Housing Authority</u> PHA Code: <u>CA094</u> PHA Type: <input checked="" type="checkbox"/> High Performer</p> <p>PHA Plan for Fiscal Year Beginning: (MM/YYYY): <u>07/2025</u> PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) Number of Public Housing (PH) Units <u>0</u> Number of Housing Choice Vouchers (HCVs) <u>10547</u> Total Combined <u>10547</u></p> <p>PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission</p> <p>Availability of Information. In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information of the PHA policies contained in the standard Annual Plan but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p>How the public can access this PHA Plan: Orange County Housing Authority (CA094) Annual PHA Plan for FY 2025 is available online located at: www.ochousing.org/doc</p> <p><input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below)</p> <table border="1" data-bbox="164 1749 1534 1808"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Program(s) not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV						
Participating PHAs	PHA Code					Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program							
		PH	HCV												

B.	Plan Elements.
B.1	<p>Revision of Existing PHA Plan Elements. (a) Have the following PHA Plan elements been revised by the PHA since its last Annual PHA Plan submission?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs. <input type="checkbox"/> <input checked="" type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions. <input checked="" type="checkbox"/> <input type="checkbox"/> Financial Resources. <input type="checkbox"/> <input checked="" type="checkbox"/> Rent Determination. <input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs. <input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention. <input type="checkbox"/> <input checked="" type="checkbox"/> Pet Policy. <input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation. <input type="checkbox"/> <input checked="" type="checkbox"/> Significant Amendment/Modification.</p> <p>(b) If the PHA answered yes for any element, describe the revisions for each revised element(s):</p> <p>Financial Resources. Annual Contributions by Program: Housing Choice Voucher Program \$205,990,193. Family Self-Sufficiency Program Coordinators \$429,864. Mainstream Voucher Program \$3,250,892. Emergency Housing Voucher Program \$12,084,649. Total: \$221,755,598</p> <p>(c) The PHA must submit its Deconcentration Policy for Field Office review.</p>
B.2	<p>New Activities. (a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/> Hope VI or Choice Neighborhoods <input type="checkbox"/> <input checked="" type="checkbox"/> Mixed Finance Modernization or Development. <input type="checkbox"/> <input checked="" type="checkbox"/> Demolition and/or Disposition. <input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Tenant Based Assistance. <input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD. <input type="checkbox"/> <input checked="" type="checkbox"/> Project Based Vouchers. <input type="checkbox"/> <input checked="" type="checkbox"/> Units with Approved Vacancies for Modernization. <input type="checkbox"/> <input checked="" type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan</p>
B.3	<p>Progress Report. Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan. See Attachment A B.3 Progress Report</p>
B.4	<p>Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.</p>
B.5	<p>Most Recent Fiscal Year Audit. (a) Were there any findings in the most recent FY Audit? Y <input type="checkbox"/> N <input checked="" type="checkbox"/> (b) If yes, please describe:</p>
C.	Other Document and/or Certification Requirements.

C.1	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) have comments to the PHA Plan? Y <input type="checkbox"/> N <input type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p>
C.2	<p>Certification by State or Local Officials.</p> <p>Form HUD-50077-SL, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.3	<p>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</p> <p>Form HUD-50077-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.4	<p>Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.</p> <p>(a) Did the public challenge any elements of the Plan? Y <input type="checkbox"/> N <input type="checkbox"/></p> <p>If yes, include Challenged Elements.</p>
D.	<p>Affirmatively Furthering Fair Housing (AFFH).</p>
D.1	<p>Affirmatively Furthering Fair Housing (AFFH).</p> <p>Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.</p>

Form identification: CA094-Orange County Housing Authority Form HUD-50075-HP (Form ID - 3217)

B.3 Progress Report

Goal 1. Open the Housing Choice Voucher Program Waiting List.

- OCHA opened the Housing Choice Voucher Program waiting list during Fiscal Year (FY) 2023/2024
- OCHA's waiting list is currently closed.

Goal 2. Enhance accessibility for disabled and limited English proficient persons.

- OCHA's website was updated with the functionality to support two additional languages, Arabic and Farsi.
- OCHA continued to contract with Language Line Services, which provided interpretation and translation services in 163 different languages.
- OCHA continued to prioritize the hiring of bilingual staff who are competent in reading, writing, and speaking Chinese, Korean, Spanish, and Vietnamese to remove a barrier to information for limited English proficient persons.
- During this FY 2024/2025 we hired thirteen (13) bilingual staff.
- American Sign Language interpreters and the California Relay Service continue to be used to communicate with those who are hard of hearing.

Goal 3. Expand efforts to affirmatively further fair housing.

- OCHA routinely held collaborative meetings with partners for our Special Purpose Voucher programs where we educated partner agencies on the Reasonable Accommodation options available that help to provide choice for persons with disabilities.
- OCHA offered security deposit assistance for participants in Special Purpose Voucher homeless programs who do not have access to other funding opportunities using HOME funds.
- OCHA conducted landlord engagement activities to provide education and outreach to area landlords on the Housing Choice Voucher Program.
- OCHA administered a landlord incentive program offering up to \$1,000 signing bonus for landlords, double security deposits, as applicable, and refrigerator assistance for tenants. The program was intended to complement existing community landlord incentive programs and support voucher holders with limited access to support service dollars.
- Extended search times were provided to allow program participants the time necessary to obtain sufficient information regarding their housing options to make an informed housing choice.
- OCHA is continuing to evaluate its expansion of efforts. Meanwhile, OCHA continues to comply with 24 Code of Federal Regulations (CFR) 5.150

Goal 4. Identify and utilize technology to enhance operational effectiveness and efficiency in delivery of housing assistance services.

- Began a pilot program to allow community service providers access to the Assistance Connect portal to upload client documentation.

- All new Housing Choice Voucher Program files continued to be digital.
- All newly created historical records continued to be imaged to prevent creation of physical files.
- The Assistance Connect portal continued to be available for applicant and landlord use to communicate with staff and transmit documents as needed.
- DocuSign seats and Adobe Pro licenses continued to be utilized to eliminate need for original signatures in certain instances.
- Remote Virtual Inspections use was expanded to include Biennial Inspections as well as new move-ins.
- OCHA continued to utilize virtual briefings and electronic reexaminations.
- Family Self-Sufficiency (FSS) briefings use the virtual briefing format which allows a broader attendance level and a more interactive experience.
- Support for completion of electronic reexaminations and initial applications using smartphones was provided to encourage the use of technology.
- The public has the option of using the technologies provided but are not required to do so. Appointments for individual service are always available.

Goal 5. Expand the supply of affordable housing by applying for additional housing assistance funding and programs that may become available.

In response to Notice PIH 2024-18 Registration of Interest for HUD-VASH vouchers, OCHA applied for and was awarded 50 HUD-VASH vouchers.

Project Based Voucher (PBV) update:

OCHA entered into a HAP agreement and leased five (5) projects during FY 24/25. Those projects include: Crossroads at Washington, which offered 43 PBV units dedicated to Mental Health Services Act (MHSA) applicants in the City of Santa Ana; Villa St. Joseph, which offered 18 MHSA units in the City of Orange; Pelican Harbor, which offered 33 units, 21 MHSA and 12 for those experiencing homelessness in the City of Huntington Beach; Orchard View, which offered 8 units for those experiencing homelessness in the City of Buena Park; and Salida del Sol, which offered 40 units, 24 MHSA, 10 VASH, and 6 for those experiencing homelessness in the City of San Juan Capistrano.

In addition to the above projects there are four (4) projects in progress which will continue into the next reporting period. In response to Notices of Funding Availability, an additional nine (9) projects are under review. OCHA will continue to explore the use of project-based vouchers as opportunities become available and upon notification of HUD to meet the local need for affordable housing.

Consistent with the PHA Plan and the Administrative Plan, OCHA's project-based activities promote deconcentration, expand housing choice and address the need for long-term, affordable housing. Further, the activities contribute to the achievement of the goals OCHA set forth in Section B.2 of the Five-Year PHA Plan.

Goal 6. Promote Family Self-Sufficiency

- OCHA applied for renewal of its Family Self Sufficiency (FSS) Coordinator funding and was awarded \$429,864.
- OCHA routinely conducted recruitment to all Housing Choice Voucher holders and performed targeted recruitment for households participating in the Family Unification, Veteran's Affairs Supportive Housing, and Emergency Housing Voucher programs.
- In 2024, OCHA invited 2,206 households to attend the FSS briefing using the virtual FSS briefing platform.
- As a result of the FSS program, 8 households increased earned income by obtaining full time employment and stopped receiving public welfare benefits.
- 36 households, including 68 children, participated in a holiday toy distribution event hosted by OCHA in partnership with Operation Santa Claus.

Item IX:

PUBLIC HEARINGS:

(None)

Item X:

REPORTS OF STAFF:

- A: Orange County Housing Authority Update
- B: Community Development
- C: Housing Development
- D: Executive Director/ Secretary's Report



OC Community Resources
M E M O R A N D U M

DYLAN WRIGHT
 DIRECTOR
 OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
 ASSISTANT DIRECTOR
 OC COMMUNITY RESOURCES

JOANNE VEEDOR
 DIRECTOR
 ADMINISTRATIVE SERVICES

MONICA SCHMIDT
 DIRECTOR
 OC ANIMAL CARE

JULIA BIDWELL
 DIRECTOR
 OC HOUSING &
 COMMUNITY DEVELOPMENT

RENEE RAMIREZ
 DIRECTOR
 OC COMMUNITY SERVICES

PAMELA PASSOW
 DIRECTOR
 OC PARKS

JULIE QUILLMAN
 COUNTY LIBRARIAN
 OC PUBLIC LIBRARIES

February 27, 2025

TO: ^{DS} *JB* H&CD Commission

FROM: Julia Bidwell, Director, Housing & Community Development/Executive Director of OCHA

SUBJECT: Executive Director’s Summary for January 2025

Individual activity reports are attached from the Managers of Housing Assistance, Housing and Community Development and Accounting:

- I. HOUSING ASSISTANCE DIVISION**
January Johnson, Housing Assistance Manager
 - A. Housing Choice Voucher Program Status and Activities
 - B. Special Housing Programs Section
 - C. Occupancy Section
 - D. Leasing Section
 - E. Administrative Section
 - F. VMS Data Collection Report-Monthly Activity
 - G. Operation Reserves Sources and Uses, Fund 117

- II. HOUSING & COMMUNITY DEVELOPMENT DIVISION**
Craig Fee, Community Development Manager
Michelle Zdeba, Housing Development Manager
 - A. Community Development
 - B. Housing Development

- III. ACCOUNTING DIVISION**
Bill Malohn, Manager
 - A. Orange County Housing Assistance (OCHA)
 - B. Housing and Community Development (H&CD)
 - C. Orange County Development Agency (OCDA) Successor

- IV. ADMINISTRATION**

January 28, 2025	Approve Estoppel and Partnership Interest Transfer for Vintage Shore
	Approve Capitalized Operating Subsidy Reserve Loan for WISEPlace PSH Apartments
	Approve Assignment, Amended Loan Documents and Subordination for Mesa Vista



OC Community Resources

M E M O R A N D U M

DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES


MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING &
COMMUNITY DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

PAMELA PASSOW
DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

DATE: February 27, 2025
TO: H&CD Commission
FROM: January Johnson, Manager, Housing Assistance Division 
SUBJECT: OCHA Status Report for January 2025

HOUSING CHOICE VOUCHER PROGRAM STATUS AND ACTIVITIES:

The Lease-up rate for January 2025 was 89.9% with 10,443 households receiving Voucher program rental assistance. VASH veterans represent 833 of the assisted tenants, 34 were in the Non-Elderly Disabled (NED) program, and 177 are in the Mainstream Program. Detailed statistics for the Housing Choice Voucher Program are shown on the attached chart. Additional highlights of January activities are as follows:

SPECIAL HOUSING PROGRAMS (SHP) SECTION:

Staffing

SHP currently has vacancies for one (1) Housing Specialist III.

Family Self-Sufficiency (FSS):

Monthly activity:

Current number of active clients with FSS contracts:	153
Clients currently earning escrow credits:	98
New Enrollees:	4

Cumulative Status

HUD-mandated Initial Contracts:	465
Cumulative FSS Graduates:	371
HUD-mandated remaining Contracts:	94
Clients graduating in January:	2

Mainstream Program:

In partnership with the Orange County Health Care Agency (HCA), the OCHA was awarded funding for 44 Mainstream Vouchers to provide rental assistance to non-elderly homeless persons with disabilities on September 4, 2018. This marked the beginning of the Mainstream Voucher Program for OCHA.

In order to align with current County initiatives, OCHA selected a specific target population to collaborate with the Health Care Agency (HCA) and the Whole Person Care (WPC) program to identify persons who are non-elderly disabled homeless households, exiting from recuperative care facilities, have no place to go and are at high risk of readmission to the hospital.

November 14, 2019 OCHA was awarded an additional 33 Mainstream Vouchers. We used this opportunity to



expand the assisted population to include non-elderly homeless individuals who were frequent users of Orange County hospitals/emergency rooms. Referrals for these additional vouchers began on March 01, 2020.

On May 18, 2020 HUD awarded OCHA an additional 24 Mainstream Vouchers in a non-competitive process. Referrals for these vouchers began on September 01, 2020 and targeted the expanded population.

On November 17, 2020 HUD awarded OCHA an additional 100 Mainstream Vouches in a non-competitive process. Referrals for these vouchers began on January 01, 2021 and targeted individuals and families recently transitioned or transitioning from Project RoomKey/HomeKey and connected to Project Tool Belt.

On December 19, 2022 HUD awarded OCHA an additional 50 Mainstream Vouchers in a non-competitive process. Referrals for these vouchers are in progress.

OCHA and HCA meet on a monthly basis to evaluate the efficacy of the referral process. The monthly meeting addresses challenges such as document retrieval, client engagement, and housing navigation.

To date, OCHA has received 704 referrals for the Mainstream Voucher Program. 192 families have successfully moved into a unit, 23 referrals have been issued a voucher and are currently searching for a unit, and 26 have been referred and are going through the eligibility process.

Family Unification Program (FUP)

OCHA has been selected as a site in the Evaluation of the Family Unification Program study. The Urban Institute is part of a research team working with the Department of Health and Human Services and HUD to conduct this study for families only (youth were not included). The study team visited OCHA on 3/14/2019 to discuss the logistics of implementing the FUP evaluation in Orange County. The Board approved to execute the MOU between Social Services Agency/ OCHA and Urban Institute on August 13, 2019. OCHA, SSA, and the Urban Institute participate in a conference call on a biweekly basis to discuss success strategies and program implementation. SSA has referred 107 applicants for the study since August 22, 2019.

On April 2, 2020 OCHA was awarded an additional 58 FUP vouchers, 29 of which were allocated for Families and 29 for Foster Youth. Referrals for these vouchers began on August 01, 2020, and all 58 have successfully moved into a unit. In total, we have 325 FUP vouchers available to use, 292 of those have successfully moved into a unit.

Foster Youth to Independence (FYI)

The Foster Youth to Independence (FYI) program provides an HCV for youth at least 18 years of age but not more than 24 years of age who have left foster care or will leave foster care within 90 days. OCHA may apply for FYI vouchers at a rate of 25 a year if OCHA's FUP program is at a 90% utilization and funding remains. The HCV provides assistance for a maximum of 36 months.

OCHA applied for and was awarded our first allocation of 25 FYI vouchers in November 2023.

As of today, OCHA has received 25 referrals for the FYI program. 19 have moved into a unit, 4 have been issued a voucher and are searching for a suitable unit, and 2 have been referred and are going through the eligibility process.

Emergency Housing Voucher Program

The Emergency Housing Voucher (EHV) program is a voucher program funded through the American Rescue Plan Act of 2021 (ARPA). ARPA was signed into law on March 11, 2021, and included funding for approximately 70,000 EHV's. HUD announced EHV awards on May 10, 2021, and the Orange County Housing Authority (OCHA) was allocated 557 EHV's.

EHV's are to assist individuals and families who are experiencing homelessness; at risk of homelessness; fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking; or were recently homeless and for whom providing rental assistance will prevent the family's homelessness or having high risk of housing instability.

On July 16, 2021, OCHA executed an MOU with the Orange County Continuum of Care. We began receiving referrals on July 26, 2021. To date we have received 881 referrals, issued 602 vouchers, and leased 552 tenants. This program will shrink with every client who leaves the program. To date, 30 households have left the program reducing the program size to 527.

Project Based Voucher Program

OCHA currently has 27 projects completed and leased. We have 11 projects under construction with AHAP executed with an expected completion date in 2024-2025: Santa Angelina in Placentia, Aurora Vista formerly Riviera Motel in Stanton, Crossroads at Washington in Santa Ana, Valencia Gardens in Orange, Orchard View in Buena Park, Cartwright in Irvine, Villa St. Joseph in Orange, Pelican Harbor formerly Huntington Beach Senior Homes in Huntington Beach, Paseo Adelanto in San Juan Capistrano, Huntington Beach Oasis in Huntington Beach, and 1400 Bristol in Costa Mesa.

OCCUPANCY SECTION:

Staffing

Currently, we do not have any vacancies.

Activity

Occupancy Section has halted issuing new vouchers. Briefings have halted as well. Occupancy continues to work closely with all our clients and applicants.

Occupancy Ongoing Activities

Occupancy activities in the month of January 2025:

Initial voucher issuance:	0
Initial vouchers expired:	6
Ongoing vouchers issued:	46
Ongoing vouchers expired:	9
Initial interviews scheduled:	0
Initial interviews conducted:	0
Total reexaminations completed:	750
Total interim decreases completed:	140
Total interim increases completed:	104
Number of repayments completed:	0

LEASING SECTION:

Leasing Ongoing Activities

Production in the Leasing Section for January 2025:

Annual Inspections Scheduled (OCHA):	726
Follow up re-inspections Scheduled (OCHA):	136
Physical Inspections (OCHA):	132
New Leases - Number of RTA's received (OCHA):	87
Annual Inspections Received (Mobility):	221
Annual Inspections Scheduled (Mobility):	118
Follow up Re-inspections (Mobility):	35
New Leases Received (Mobility):	47
New Leases Scheduled (Mobility):	27
QC Inspections:	16
QC Inspections (Mobility):	5
Rent Increases received:	486
Rent Decreases received:	0
Rent Increase denied:	45
Rent Increase emails:	1011

Rent Increase Calls:	81
Mobility Rent Increase:	142

Total Abatement:

Final notices mailed:	25
Were Abated:	4

Owners:

Owners became inactive for the month of January 2025:	2
Owners relisted their property:	0
Units added to our vacancy listings:	52
Owner Hotline callers assisted:	154

Staffing

Leasing currently has two vacancies, one for a Housing Specialist I/II position, and one for a Senior Housing Specialist. Active recruitment is in process.

Outreach Efforts

In January 2025, the Orange County Housing Authority continued to provide excellent customer service assisting 267 callers through the Owner Hotline and 81 callers through the rent increase line to meet the specific needs of OC's landlords and property managers.

As operations move forward, customer service and timely business operations continue to be a priority.

ADMINISTRATION SECTION:

Staffing

Currently have zero vacant positions. The new Senior Housing Specialist started on January 10, 2025.

Operations

Administration's efforts have been focused on OCHA operations, including, but not limited to, purchasing supplies and equipment, managing the physical facility, supporting the needs of the other OCHA sections, and communicating operational information to the public via the OCHA Reception telephone lines, the "OCHA Contact" email hotline, AccessOC and the OCHA webpage.

Administration Ongoing Activities

Critical tasks completed during January included the following:

Calls and inquiries addressed:	1862
Mail Processed:	11623
Public Records Act and Data Requests resolved:	3

VMS Data Collection Report

	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24
Homeownership	4	4	4	4	4	4	4	3	3	3	3	3
Homeownership HAP	\$6,172	\$6,959	\$6,959	\$6,692	\$6,692	\$6,943	\$6,975	\$5,567	\$5,567	\$5,532	\$5,532	\$5,489
Family Unification	305	301	302	305	304	301	300	303	300	298	297	291
Family Unification - (HAP)	\$617,246	\$610,425	\$617,344	\$635,127	\$628,107	\$618,815	\$622,105	\$624,020	\$625,389	\$615,262	\$607,996	\$588,366
Non Elderly Disabled	33	34	33	32	34	35	36	37	36	36	37	36
Non Elderly Disabled - (HAP)	\$53,578	\$55,176	\$53,591	\$51,959	\$54,915	\$57,415	\$60,772	\$60,685	\$60,757	\$60,885	\$63,120	\$62,049
Portable Vouchers Paid	11	11	11	13	13	11	12	10	15	17	17	18
Portable Voucher Paid HAP	\$13,946	\$13,958	\$13,169	\$17,340	\$17,880	\$16,465	\$18,924	\$17,137	\$25,250	\$26,057	\$26,715	\$28,648
Tenant Protection	38	37	36	36	35	35	34	34	34	34	34	34
Tenant Protection HAP	\$59,126	\$58,541	\$58,474	\$58,280	\$59,250	\$59,649	\$57,030	\$57,013	\$58,025	\$58,025	\$58,040	\$58,816
Enhanced Vouchers	2	2	2	2	2	2	2	2	2	2	2	2
Veterans Affair Supported Housing (VASH) Voucher	795	813	811	821	826	830	828	836	846	838	848	840
Veterans Affair Supported Housing (VASH) HAP	\$1,203,178	\$1,233,428	\$1,242,143	\$1,262,879	\$1,280,392	\$1,291,543	\$1,318,557	\$1,337,009	\$1,343,109	\$1,345,476	\$1,351,696	\$1,339,550
All Other Vouchers	9,090	9,139	9,139	9,098	9,107	9,131	9,153	9,156	9,140	9,173	9,143	9,112
All Other Vouchers HAP	\$14,536,553	\$14,682,267	\$14,757,806	\$14,847,352	\$14,944,666	\$15,084,523	\$15,181,287	\$15,252,526	\$15,289,886	\$15,388,784	\$15,421,028	\$15,396,178
FSS Escrow Deposits	\$24,706	\$21,075	\$23,590	\$24,516	\$22,820	\$23,438	\$24,662	\$24,762	\$26,801	\$29,962	\$29,661	\$33,096
All Voucher HAP Expenses After the First of Month	\$120,807	\$82,486	\$81,890	\$86,375	\$118,539	\$88,068	\$78,076	\$43,958	\$75,694	\$42,959	\$33,441	\$40,438
Total Vouchers	10,276	10,339	10,336	10,309	10,323	10,347	10,367	10,379	10,374	10,399	10,379	10,334
HAP Total	\$16,635,132	\$16,762,315	\$16,854,966	\$16,990,520	\$17,133,261	\$17,246,853	\$17,368,388	\$17,422,677	\$17,510,478	\$17,572,942	\$17,597,229	\$17,552,630
Number of Vouchers Under Lease (HAP Contract) on the last day of the Month	9,587	9,563	9,593	9,599	9,630	10,347	9,634	9,595	9,656	9,618	9,560	9,512
New vouchers issued but not under HAP contracts as of the last day of the month	165	157	154	157	160	115	77	51	33	27	22	5
Portability (Port In)	1,317	1,322	1,316	1,323	1,319	1,333	1,330	1,340	1,344	1,351	1,358	1,356
Portability (Port In HAP Administered)	\$2,522,550	\$2,538,419	\$2,537,982	\$2,563,956	\$2,582,933	\$2,611,408	\$2,631,022	\$2,654,804	\$2,678,664	\$2,698,510	\$2,705,040	\$2,707,656
Number of Vouchers covered by Project-Based under AHAPs and not under HAPs*	110	110	334	306	285	285	285	285	285	285	285	285
Number of PBVs under HAP and leased	646	663	667	701	730	745	763	770	777	790	835	835
Number of PBVs under HAP and not leased	75	68	64	128	80	65	47	40	33	63	36	36
Fraud Recovery - Amount Booked this Month				\$1,826	\$870	\$1,737		\$125		\$125	\$250	
FSS Escrow Forfeitures This Month	\$12,969		\$53,982		\$35,679				\$58,003	\$46,737	\$18,217	
Number of Hard to House Families Leased	63	33	39	39	57	34	44	14	58	32	14	18
Portable HAP Costs Billed and Unpaid - 90 Days or older	\$1,725,237	\$1,644,477	\$1,557,146	\$1,507,367	\$1,437,385	\$1,383,689	\$1,401,507	\$1,531,888	\$1,529,246	\$1,430,918	\$1,505,176	\$1,583,099



**FY 24-25 OCHA OPERATING RESERVES
SOURCES AND USES OF CASH, FUND 117
AS OF 01/31/25**

	<u>FY 24-25 Budget</u>	<u>YTD Exp/Rev Actual - Cash</u>	<u>FY 24-25 Y/E Cash</u>
Beginning Cash Balance as of 07/01/24	13,256,492	13,256,492	13,256,492
Less: Other Miscellaneous Obligations			
Available Cash Balance as of 01/31/25	13,256,492	13,256,492	13,256,492
<u>Additional Sources of Cash</u>			
Interest Received - County Investment Pool	550,000	346,416 (2)	550,000
Interest Received - Ops Reserve Loans	10,830	0 (1)	10,830
Principal Received - Ops Reserve Loans	0	0	0
Residual Receipts Payment - Laguna Canyon Housing & Tustin Heritage Place	0	0	0
Rents & Concessions - El Modena Rental Property	8,520	4,970	8,520
Miscellaneous Revenue - Expense & Interest Rebates from Prior Years	0	0	0
Miscellaneous Revenue - NEPA Environmental Costs from Fund 15G HOME	100,000	58,269	100,000
Miscellaneous Revenue - OC ARPA Landlord Incentives	0	0	0
Miscellaneous Revenue - Partial Repayment of Bankruptcy Loss	0	0	0
Miscellaneous Revenue - TBRA reimbursement from Fund 15G HOME (Fund Balance Unassigned)	208,575 0	2,740 0	208,575 0
TOTAL SOURCES OF CASH:	14,134,417	13,668,888	14,134,417
<u>Uses of Cash</u>			
Building & Improvements Maintenance - El Modena/Esplanade Property	20,000	0	20,000
Affordable Housing/OCHA Rental Obligation (Balancer)	5,542,909	0	0
Admin/Accounting staffs support to OCHA Ops Reserve	79,668	24,139	79,668
HCD Staff Support to OCHA Ops Reserve (KG00117)	250,000	24,699	250,000
HCD/OCHA Staff Support for Joint Legislative Audit Committee	0	9,673	29,020
HCA/OCCR Admin Support for \$6M Landlord Incentive Program	75,000	(207)	75,000
Monique Miner-CivicStone - FY23/24	0	11,933	11,933
NEPA Environmental Costs (i.e. Dudek)	400,000	232,545	398,648
OCHA District Attorneys MOU - FY 24-25	150,000	0	150,000
OCHA Settlement Costs (Added new for FY 24-25)	75,000	0	75,000
Single All Funds Audit	66	0	66
County-wide Cost Allocation Plan (CWCAP)	5,500	0	5,500
County Investment Pool Admin Cost (Treasurer)	5,000	2,331	5,000
Family Self-Sufficiency Enhancement Payments	25,000	1,200	25,000
OCHA Landlord Incentive Program (KH017004)	3,000,000	238,840	1,000,000
Fleet Services Asset Management & Services	0	3,722	22,333
OC Landlord Incentives (KG017004)	308,575	0	308,575
Tenant Based Rental Assistance Program (Fund 15G HOME - KH99006)	208,575	2,740	208,575
TOTAL USES OF CASH:	10,145,293	551,615	2,664,317
TOTAL FY 24-25 UNCOMMITTED CASH:	3,989,124	13,117,273	11,470,100
LESS: Future Year's Non-discretionary Obligations			
OCHA Monthly Rental Obligations (3)			(4,757,807)
TOTAL FY 24-25 DISCRETIONARY CASH:			6,712,293

(1) Budgeted amount represents interest amount only.

(2) The Treasurer is three months behind in dispersing interest. Per 13 Corrections are included in July numbers.

(3)

The \$ 4.7 million is the amount reserved for the monthly OCHA HAP payments, Shelter Plus Care payments & FSS payments in case the monthly HUD payments are late.

Note: This document does not account for the accounts receivable reserve for housing loans.

See Attachments (1. Payment Schedule 2. Terms and Conditions) for current details of the accounts receivable.



OC Community Resources

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PAM PASSOW
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OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

DATE: February 27, 2025
TO: H&CD Commission ^{DS}
FROM: Julia Bidwell, Director *JB*
OC Housing & Community Development

**SUBJECT: Housing and Community Development Division
Status Report January 2025**

COMMUNITY DEVELOPMENT

Five-Year Consolidation Plan

The Five-Year Consolidated Plan (ConPlan) is a planning document for the use of HUD funds under the Community Development Block Grant (CDBG), HOME Investment Partnership Act (HOME), and Emergency Solutions Grant (ESG) programs. The FY 2025-29 ConPlan assessment is currently being updated for the next five years and is due to HUD by May 15, 2025. The updated plan will identify the current housing and community development needs in the Urban County and sets forth a strategic plan for addressing the identified needs. A presentation on the ConPlan will be brought to the Housing & Community Development Commission at their March 27, 2025 meeting.

HOUSING DEVELOPMENT

Project Review Advisory Panel (PRAP)

- I. PRAP met on January 9, 2025 at 1:00 p.m. via Microsoft Teams Meeting:
 - PRAP concurred with staff’s recommendations to pass Marks Way on threshold and continue to underwriting
 - PRAP concurred with staff’s recommendations to commit up to \$5,225,000 in capital funding, as well as thirty-eight (38) Housing Choice Project-Based Vouchers, to Jamboree Housing Corporation for the development of Brea PSH in the City of Brea

- II. Future PRAP meeting: February 13, 2025, at 1:00 p.m. virtually via Microsoft Teams Meeting



Affordable Rental Housing Programs

Projects Under Development (2020 and 2023 Notice of Funding Availability)

Pelican Harbor (formerly Huntington Beach Senior Housing) – The Board of Supervisors (Board) approved a \$3,603,160 Mental Health Services Act (MHSA) loan and thirty-three (33) Project-Based Vouchers for individuals experiencing homelessness earning at or below 30% AMI. Pelican Harbor is new construction of 43 units (42 rental units) of affordable housing for low to extremely-low income homeless households with 21 units set-aside for households who meet the MHSA eligibility criteria, and the remaining 12 units will be used for non-MHSA seniors. The developer, Jamboree Housing Corporation (Jamboree), secured 4% low-income housing tax credits and closed on the construction loan in February 2022. Construction was completed in January 2025.

Center of Hope Apartments (The Salvation Army) (Completed) – The Board approved a \$655,120 MHSA loan and sixteen (16) Project-Based Vouchers for individuals experiencing homelessness earning at or below 25% AMI. Center of Hope Apartments is new construction of 72 units (70 rental units and two manager's units) of affordable housing for extremely low-income homeless households with 20 units set-aside for households who meet the MHSA eligibility criteria. The developer, The Salvation Army, secured 4% low-income housing tax credits and closed on the construction loan in February 2022. Construction was completed in September 2023, and the Developer is targeting permanent conversion early 2025.

The Crossroads at Washington (Completed) – The Board approved a \$2,650,701 HOME loan and forty-three (43) Project-Based Vouchers for individuals experiencing homelessness earning at or below 30% AMI. The Crossroads at Washington is new construction of 86 units (85 rental units and one manager's unit) of affordable housing for extremely low-income households with 43 units set-aside for formerly homeless households. The developer, The Related Companies of California, secured 9% low-income housing tax credits and closed on the construction loan in July 2022. Construction was completed in July 2024 and developer is targeting permanent conversion in February 2025.

Villa St. Joseph (Completed) – The Board approved a \$1,020,600 HOME loan, \$1,400,000 MHSA loan and eighteen (18) Project-Based Vouchers for Villa St. Joseph, a rehabilitation of 50 units (49 rental units and one manager's unit) of affordable housing for very low and extremely low-income households with 18 units set-aside for individuals experiencing homelessness earning at or below 20% AMI. The developer, Mercy Housing California, secured 4% tax-exempt bond and a 4% supplemental bond allocation from CDLAC. The project closed on construction loan financing and started construction in December 2022. Construction was completed in September 2024 and the Developer is targeting permanent conversion in June 2025.

Salida Del Sol (formerly Paseo Adelanto) – The Board approved a \$2,384,630 MHSA loan and thirty (30) Housing Choice and ten (10) Veterans Affairs Supportive Housing (VASH) Project-Based Vouchers for individuals experiencing homelessness earning at or below 30% AMI. Paseo Adelanto is a mixed-use development of 50 units (49 rental units and one manager's unit) of affordable housing for extremely low-income households with up to 24 units set-aside for individuals experiencing homelessness who meet the MHSA eligibility criteria. The developer, Jamboree, secured 9% low-income housing tax credits and closed on the construction loan in December 2022. Construction is anticipated to be completed in early 2025.

Archways Santa Ana (formerly Westview House) (Completed) – The Board approved a \$4,258,280 MHSA loan for 26 units for individuals experiencing homelessness who meet the MHSA eligibility criteria and earning at or below 30% AMI. Westview House is new construction of 85 units (84 rental units and one manager’s unit) of affordable housing for individuals experiencing homelessness. The developer, Mercy House CHDO Inc. and Community Development Partners, secured 4% low-income housing tax credits. The project closed on construction loan financing and started construction in June 2022. Construction was completed in July 2024 and developer is targeting permanent conversion in April 2025.

The Meadows Senior Apartments – The Board approved a \$1,540,000 ARPA-SLFRF loan for 7 units for households experiencing homelessness that meet the MHSA eligibility criteria earning 30% of the AMI or below. The Meadows Senior Apartments is new construction of 65 units (64 rental units and one manager’s unit) of affordable housing for seniors (62 years or older) earning between 30% to 60% AMI. The developer, C&C Development, secured 4% low-income housing tax credits. The project closed on construction loan financing and started construction in December 2022. Construction was completed in December 2024.

Clara Vista (formerly Tahiti Motel) (Completed) – The Board approved a \$2,400,000 HSA loan, forty-nine (49) Housing Choice and ten (10) VASH Project-Based Vouchers for individuals experiencing homelessness. Tahiti Motel is a rehabilitation of 60 units (59 rental units and one manager’s unit). The developer, Jamboree, secured 9% low-income housing tax credits and closed on the construction loan in April 2022. Construction was completed in December 2023 and converted to permanent financing in December 2024.

Aurora Vista (formerly Riviera Motel) (Completed) – The Board approved a \$1,532,983 MHSA loan, \$500,000 HOME loan, \$1,000,000 ARPA loan and ten (10) Housing Choice and ten (10) VASH Project-Based Vouchers for individuals experiencing homelessness. Riviera Motel is a rehabilitation of 21 units (20 rental units and one manager’s unit). The developer, Jamboree, secured 9% low-income housing tax credits and closed on the construction loan in April 2022. Construction was completed in March 2024, and the Developer is targeting permanent conversion in February 2025.

Mesa Vista (formerly Motel 6) (Phase I Completed) – The Board approved a \$4,500,000 MHSA loan, \$850,000 ARPA loan and thirty (30) VASH Project-Based Vouchers for individuals experiencing homelessness. Mesa Vista is a two-phase conversion/rehabilitation of a 94-room motel into 88 units of permanent housing (87 rental units and one manager’s unit). The developers, Community Development Partners and CM Mercy House CHDO LLC, closed on construction loan financing for Phase I in December 2022 and began construction on 40 units of permanent supportive housing. Construction on Phase I was completed in December 2023. The Developers are targeting construction loan closing in February 2025 for Phase II.

Cartwright Family Apartments – The Board approved a \$1,574,810 MHSA loan, \$2,067,000 ARPA-SLFRF loan and eight (8) Project-Based Vouchers for individuals experiencing homelessness earning at or below 30% AMI. Cartwright Family Apartments is new construction of 60 units (59 rental units and one manager’s unit) of affordable housing for low to extremely low-income households. The developers, a partnership between Waterford Group, the Riverside Charitable Corporation and C&C Development, secured 4% low-income housing tax credits and closed on the construction loan in May 2023. Construction is anticipated to be completed in June 2025.

WISEPlace PSH – District 2 committed \$1,500,000 ARPA-SLFRF loan for individuals experiencing homelessness earning at or below 30% AMI. WISEPlace PSH has 48 units (47

rental units and one manager's unit) of affordable housing developed by Jamboree. The project closed on the construction loan in March 2023. The Board approved a \$2,682,400 Mental Health Services Act Funds Capitalized Operating Subsidy Reserve (COSR) loan as operating subsidy. Construction is anticipated to be completed in February 2025.

HB Oasis – The Board approved a \$5,121,130 APRA-SLFRF loan, and sixty-two (62) Housing Choice Project-Based Vouchers for individuals experiencing homelessness. HB Oasis is an adaptive re-use of a 64-room Quality Inn and Suites. The Developers closed on acquisition and completed the necessary rehab for the interim phase. Developers are working towards converting to 62 permanent rental housing units and one manager's unit). The Developers received a 9% low-income housing tax credit award and closed on the construction loan in May 2024. Construction is anticipated to be completed in October 2025.

FX Residences (formerly Francis Xavier) - The Board authorized submittal of a grant application and was awarded \$3,382,388 for No Place Like Home (NPLH) competitive funding. The Board also approved \$2,834,658 in Special Needs Housing Program (SNHP) funding for 13 MHSA units. FX Residences is 17 units of affordable housing for low- to extremely low-income set-aside for households who are homeless or at-risk of homelessness, including residents who meet the MHSA eligibility. The developer, HomeAid Orange County Inc., applied and was awarded OCHFT funding and closed on the construction loan in June 2023. Construction is anticipated to be completed in February 2025.

Orchard View Gardens – The Board authorized submittal of a joint application and was awarded \$3,042,572 in competitive NPLH funding and \$969,955 in COSR funding for 13 MHSA units. The Board approved a \$1,259,848 MHSA loan and 8 Project-Based Vouchers for individuals at-risk of homelessness or experiencing homelessness. The developer, National CORE, received a 9% low-income housing tax credit award, closed on construction loan financing in June 2023 and started construction. Construction was completed in January 2025.

The Orion Apartments – The Board approved a \$921,150 MHSA loan and eight (8) Project-Based Vouchers for seniors experiencing homelessness earning at or below 30% AMI. The Orion Apartments is new construction of 166 units (164 rental units and two manager's unit) of affordable housing for low to extremely low-income senior households. The developers, a partnership between USA Properties Fund Inc. and the Riverside Charitable Corporation, secured 4% low-income housing tax credits and closed on the construction loan in May 2024. Construction is anticipated to be completed in December 2025.

Grand Openings/Groundbreakings/Events –

- I. A Groundbreaking Ceremony for Lincoln Avenue Apartments will be held on Tuesday, February 18, 2025, at 11:00 a.m. at 7101 Lincoln Avenue, in the City of Buena Park.
- II. A Grand Opening for Archways Santa Ana will be held on Wednesday, March 12, 2025, at 10:00 a.m. at 2530 Westminster Avenue, in the City of Santa Ana.

2016 Permanent Supportive Housing Notice of Funding Availability

On November 10, 2015, the Board authorized the OC Community Resources (OCCR) Director, or designee, to issue a Permanent Supportive Housing Notice of Funding Availability (2016

PSH NOFA) with an emphasis on developing extremely low-income housing in a combination of up to \$8 million in Orange County Housing Successor Agency funds (HSA) and Federal HOME and utilize up to 100 Housing Choice Project-Based Vouchers. Staff will return to the Board for funding commitments to individual projects. The PRAP concurred with staff's 2016 PSH NOFA policy recommendations at the December 10, 2015, PRAP meeting.

On April 24, 2018, the Board approved adding \$4 million and up to a combined 100 VASH and/or Housing Choice Vouchers to the 2016 PSH NOFA. On December 18, 2018, the Board approved adding \$2 million in HAS funds and/or HOME and up to an additional of 50 U.S. Department of Housing and Urban Development Veterans Affairs Supportive Housing (HUD-VASH).

The 2016 PSH NOFA committed a combination of \$13,020,361 in capital funding and 200 Housing Choice, 15 Mainstream and 13 Veterans Affairs Project-Based Vouchers to complete 13 projects, resulting in the development of 773 affordable and supportive housing units.

2020 Supportive Housing Notice of Funding Availability

On December 17, 2019, the Board authorized the OCCR Director, or designee, to issue a 2020 Supportive Housing Notice of Funding Availability (2020 NOFA) with an emphasis on developing extremely low-income housing in a combination of up to \$13 million in Orange County HSA funds, Federal HOME funds and MHSA funds and utilize up to 200 Housing Choice Project-Based Vouchers and return to the Board for funding commitments to individual projects.

The Board also approved the changes in policy and process for the 2020 NOFA. The 2020 NOFA was released on January 27, 2020. Subsequently, on May 19, 2020, after the discontinuance of the Special Needs Housing Program and anticipation of remaining funds being returned to the County, the Board approved increasing the MHSA funding in the 2020 NOFA by up to \$5.5 million.

On October 20, 2020, the Board approved an increase and decrease to the 2020 NOFA by \$1,085,000 in MHSA to commit to Stanton Inn and Suites to satisfy the required capital match under the Homekey Program. On November 17, 2020, the Board approved an increase in the amount of HSA, HOME, Fund 15B and Fund 135 funds in the 2020 NOFA by up to \$3.5 million and a decrease the amount of HSA funds in the 2020 NOFA by \$2.4 million to include the Tahiti Motel, located at 11850 Beach Boulevard, Stanton, and shift funds to accommodate projects that have pending applications for funding under the 2020 NOFA.

On May 25, 2021, the Board approved an increase to the 2020 NOFA \$6.5 million in American Rescue Plan Act-HOME Supplemental Funds and Federal HOME funding to the 2020 Supportive Housing NOFA and 157 Project Based VASH, Mainstream and/or Housing Choice Vouchers. As required by the recently released HOME-ARP guidance, staff will be submitting an Allocation Plan to HUD for the use of the funds.

On November 16, 2021, the Board approved to increase the 2020 NOFA by \$1,069,462 in MHSA funding and to add 10 Project-Based VASH and up to 100 Project Based Housing Choice Vouchers with a preference for Homekey approved projects.

On June 28, 2022, the Board approved to increase the 2020 NOFA by \$500,000 and approved commitment of the funds as a construction to permanent loan to the Riviera Motel.

On September 13, 2022, the Board approved of an Amended and Restated Memorandum of Understanding between OC Community Resources (OCCR) and OC Health Care Agency (HCA) for transfer of up to an additional \$30,000,000 in MHSA funding and increase to the 2020 NOFA (or subsequent NOFA as approved by the Board) by up to \$30,000,000 in MHSA funding.

On September 27, 2022, the Board authorized to utilize previously appropriated American Rescue Plan Act Coronavirus State and Local Fiscal Recovery Funds (ARPA-SLFRF) to add up to \$21 million to the 2020 NOFA (or subsequent NOFA as approved by the Board) for the development of permanent supportive housing.

On October 18, 2022, the Board approved to increase the 2020 NOFA by up to \$3.5 million in MHSA, ARPA-SLFRF and Southern California Home Financing Authority (SCHFA) funding and commitment of the funds for loan financing to Homekey approved projects.

On December 6, 2022, the Board considered approval to increase the 2020 NOFA by up to \$850,000 in ARPA-SLFRF funding and commitment of the funds as a construction to permanent loan to the Motel 6 Homekey Project for a total amount not to exceed \$5,350,000 in County funding.

Staff received 19 applications listed below requesting \$31,053,493 in HOME/HSA/MHSA/Fund 15B/Fund 135/ARPA-SLFRF/SCHFA funds, 292 Housing Choice Project-Based Vouchers, 60 Project-Based VASH Vouchers and one withdrawn application.

Developer	Project Name	Funding Request	Project-Based HCV Request	Project-Based VASH Request	Total Units	Type	City	Status
National CORE	Mountain View	\$453,600	8	0	71	Families / MHSA	Lake Forest	Project Completed
National CORE	Santa Angelina Senior	\$500,000	21	0	65	Seniors / MHSA	Placentia	Project Completed
National CORE	Orchard View Gardens	\$453,600	8	0	66	Seniors / MHSA	Buena Park	Project Completed
Jamboree Housing Corp.	Ascent (formerly Airport Inn Apartments)	\$0	12	0	58	Homeless Individuals / MHSA	Buena Park	Project Completed
The Salvation Army	The Salvation Army Anaheim Center of Hope	\$655,120	16	0	72	Homeless Individuals / MHSA	Anaheim	Project Completed
C&C Development	Cartwright Family Apartments	\$567,000	8	0	60	Large Families / MHSA	Irvine	Under Construction
Mercy Housing California	Villa St. Joseph	\$2,420,600	18	0	50	Senior Individuals / MHSA	Orange	Project Completed
Jamboree Housing Corp.	Pelican Harbor (formerly Huntington Beach Senior Housing)	\$3,603,160	33	0	43	Senior Individuals / MHSA	Huntington Beach	Project Completed
Orange Housing Dev. Corp. & C&C Dev.	Valencia Gardens (formerly Orange Corporate Yard)	\$479,520	8	0	62	Families / MHSA	Orange	Project Completed

Jamboree Housing Corp.	Salida Del Sol (formerly Paseo Adelanto)	\$2,384,630	30	10	50	Homeless Individuals / MHSA	San Juan Capistrano	Under Construction
Community Development Partners	Archways Santa Ana (formerly Westview House)	\$4,258,280	0	0	85	Large Families / MHSA	Santa Ana	Project Completed
C&C Development	The Meadows Senior Apartments	\$1,540,000	0	0	65	Seniors / MHSA	Lake Forest	Project Completed
C&C Development	Lincoln Avenue	\$0	0	0	0	Low-Income and Homeless Families	Buena Park	Project Withdrawn
Jamboree Housing Corp.	Iluma (formerly Stanton Inn and Suites)	\$1,085,000	71	0	72	Homeless/At-risk/COVID-19/MHSA	Stanton	Project Completed
Jamboree Housing Corp.	Clara Vista (formerly Tahiti Motel)	\$2,400,000	49	10	60	Homeless/At-risk/COVID-19	Stanton	Project Completed
Jamboree Housing Corp.	Aurora Vista (formerly Riviera Motel)	\$3,032,983	10	10	21	Homeless/At-risk/COVID-19/MHSA	Stanton	Project Completed
Community Development Partners.	Mesa Vista (formerly Motel 6)	\$5,350,000	0	30	88	Homeless/At-risk/COVID-19/MHSA	Costa Mesa	Phase I Completed Phase II In Progress of Funding
The Related Companies of California, LLC	The Crossroads at Washington	\$370,000	0	0	86	Families/ Permanent Supportive Housing	Santa Ana	Project Completed
Jamboree Housing Corp.	WISEPlace Supportive Housing	\$1,500,000	0	0	48	Families/ Permanent Supportive Housing	Santa Ana	Under Construction
TOTALS		\$31,053,493	292	60	1,122			

2023 Supportive Housing Notice of Funding Availability

On February 7, 2023, the Board authorized the OCCR Director, or designee, to issue a 2023 Supportive Housing Notice of Funding Availability (2023 NOFA) with an emphasis on developing extremely low-income housing for a combination of up a total of \$67.1 million in Federal HOME funds, Federal HOME American Rescue Plan Act (HOME-ARP) funds, State MHSA funds and American Rescue Plan Act Coronavirus State and Local Fiscal Recovery Funds (ARPA-SLFRF) and utilize up to 210 Housing Choice and/or Veterans Affairs Project-Based Vouchers and return to the Board for funding commitments to individual projects. The 2023 NOFA was released on March 20, 2023.

Staff received 12 applications listed below, with eight active applications requesting \$31,281,460 in HOME/HOME-ARP/MHSA/ARPA-SLFRF funds, 192 Housing Choice Project-Based Vouchers, 10 Project-Based VASH Vouchers and four withdrawn applications.

Developer	Project Name	Funding Request	Project-Based HCV Request	Project-Based VASH Request	Total Units	Type	City	Status
National CORE & American Family Housing	HB Oasis	\$5,121,130	62	0	63	Homeless Individuals	Huntington Beach	Under Construction
American Family Housing	15081 Jackson	\$11,494,210	30	0	65	Homeless, MHSA eligible individuals	Midway City	Application received in June 2023. PRAP concurred with passing project on threshold and underwriting review. On June 25, 2024, the Board approved commitment of funding (capital and capitalized operating subsidy reserve) and PBVs.

American Family Housing	15222 Jackson	\$0	0	0	0	Homeless, MHSA eligible individuals	Midway City	Project Withdrawn
Linc Housing Corporation	La Palma Homekey	\$0	0	0	0	Homeless, MHSA eligible individuals	Anaheim	Project Withdrawn
Mercy Housing	Baker Street Placentia	\$3,000,000	17	0	68	Low-Income and Homeless Families, MHSA eligible individuals	Placentia	Application received in June 2023. PRAP concurred with passing project on threshold and underwriting review. On July 23, 2024, the Board approved commitment of funding and PBVs.
C&C Development	Lincoln Avenue	\$1,384,230	13	0	55	Low-Income and Homeless Families, MHSA eligible individuals	Buena Park	Under Construction
American Family Housing	1400 Bristol	\$6,781,520	48	10	78	Homeless, MHSA eligible individuals	Costa Mesa	Application received in July 2023. PRAP concurred with passing project on threshold and underwriting review. On July 18, 2023, the Board approved commitment of funding and PBVs.
Community Development Partners.	Mesa Vista (formerly Motel 6)	\$0	10	0	40	Homeless/At-risk/COVID-19/MHSA	Costa Mesa	Phase I Completed Phase II is in progress of funding.
Pathways of Hope	Amerige	\$0	0	0	0	Homeless Individuals	Fullerton	Project Withdrawn
Orange 702, L.P.	The Orion Apartments	\$921,150	8	0	166	Seniors / MHSA eligible individuals	Orange	Under Construction
American Family Housing	Goldenwest Apartments	\$700,000	19	0	29	Homeless, MHSA eligible individuals	Westminster	Application received in October 2023 and is under underwriting review.
National CORE	Marks Way Orange	\$0	0	0	0	Homeless Individuals	Orange	Project Withdrawn
TOTALS		\$29,402,240	217	10	564			

2023 Supportive Housing Notice of Funding Availability First Amendment

On February 27, 2024, the Board approved issuance of the 2023 NOFA First Amendment making available up to \$32.7 million in Federal HOME, HOME American Rescue Plan Program (HOME-ARP), MHSA and 15G Reserves funds and up to 218 Housing Choice, Mainstream and/or Veterans Affairs Supportive Housing Project-Based Vouchers. The 2023 NOFA First Amendment was released on March 14, 2024.

Staff received 6 applications listed below, with five active applications requesting \$12,698,200 in HOME/HOME-ARP/MHSA/15G Reserve funds, and 105 Project-Based Housing Choice Vouchers and/or VASH Vouchers and one withdrawn application.

As of September 9, 2024, the 2023 Supportive Housing NOFA First Amendment is suspended until further notice, as we prioritize our resources for Homekey+ Program.

On November 14, 2024, staff held a Developer Input Session to solicit feedback from developers on recommended changes to NOFA policies and process and discuss current trends, development/construction costs and other related issues that the County should take into consideration for the next NOFA.

Developer	Project Name	Funding Request	Project-Based Voucher Request	Total Units	Type	City	Status
Jamboree	WISEPlace PSH	\$2,682,400	0	48	Families/ Permanent Supportive Housing	Santa Ana	Construction is anticipated to be completed in January 2025. Developer identified a gap in financing and applied under the 2023 NOFA First Amendment in April 2024. PRAP concurred with passing project on threshold. On October 17, 2024, PRAP concurred with passing project on underwriting review. On January 28, 2025, the Board approved commitment of COSR funding.
USA Properties Fund Inc.	Metro at Melrose	\$0	0	0	Low-Income and Homeless Families, MHSA eligible individuals	Placentia	Project Withdrawn
C&C Development	Altrudy II Senior Apartments	\$1,100,000	8	71	Seniors / MHSA	Yorba Linda	Application received in July 2024. On September 12, 2024, PRAP concurred with passing project on threshold and continue with underwriting review.
National CORE	Marks Way	\$1,200,000	25	50	Homeless individuals	Orange	Application received in July 2024. On January 9, 2025, PRAP concurred with passing project on threshold review and continue with underwriting review.
Jamboree Housing Corp.	Brea PSH	\$5,225,000	38	39	Homeless Individuals	Brea	Application received in August 2024. On January 9, 2025, PRAP concurred with passing project on underwriting review.
Jamboree Housing Corp.	Costa Mesa Senior	\$2,490,800	34	70	Seniors / MHSA	Costa Mesa	Application received in August 2024. On October 17, 2024 PRAP concurred with passing project on threshold review and continue with underwriting review.
TOTALS		\$12,698,200	105	278			

Homekey Program

The Homekey Program (Homekey) is a statewide effort to sustain and rapidly expand housing for persons experiencing homelessness or are at risk of homelessness, and who are, thereby, disproportionately impacted by and at increased risk for medical diseases or conditions due to the COVID-19 pandemic or other communicable diseases.

The County and the applicable developers, as co-applicants, submitted applications to the California Department of Housing and Community Development Department (State HCD) for funding in Rounds 1, 2 and 3 of Homekey and were awarded over \$83 million in funding to acquire, rehabilitate, construct and/or operate six projects:

- Round 1
 - Iluma (formerly Stanton Inn and Suites), Stanton (72 units/\$9.6 million in Homekey funding)
 - Clara Vista (formerly Tahiti Motel), Stanton (60 units/\$10,992,000 in Homekey funding)
- Round 2

- HB Oasis (formerly Quality Inn and Suites), Huntington Beach (64 units/\$17 million in Homekey funding)
- Aurora Vista (formerly Riviera Motel), Stanton (21 units/\$6,070,000 in Homekey funding)
- Mesa Vista (formerly Motel 6), Costa Mesa (88 units/\$10,550,000 in Homekey funding)

•Round 3

- 1400 Bristol (formerly Travelodge), Costa Mesa (78 units/\$29 million in Homekey funding). On July 23, 2024, the County received a conditional award letter for \$29 million in Homekey capital funding. On August 14, 2024, State HCD announced \$130 million in Homekey funding awards to local jurisdictions including this project. Staff, along with the co-applicant/developer, worked with State HCD to accept the award and is continuing to work with State HCD to receive funds to acquire the property and complete construction by the 12-month deadline.

Homekey+ Program: Homekey+ is the permanent housing component of the Behavioral Health Infrastructure Bond Act, part of Proposition 1 passed by California voters in March 2024. State HCD, in partnership with CalVet, will expand the Homekey Program with Homekey+ utilizing approximately \$2 billion in funding from the Bond Act to help support the development of permanent affordable housing with supportive services for veterans and individuals with mental health or substance use challenges who are at risk of, or experiencing, homelessness. State HCD anticipates releasing the Homekey+ Notice of Funding Availability (NOFA) in November 2024 with applications due in early 2025.

In anticipation of State HCD's release of the Homekey+ NOFA in November 2024, staff, in partnership with Corporation for Supportive Housing, hosted a Roundtable event on September 23, 2024 at 11:00 am. During this roundtable discussion, we focused on sharing insight on Homekey and exploring the Homekey+ Program.

Staff released a Request for Information/Qualifications (RFI) to solicit interested developers or potential projects located in Orange County that could utilize Homekey+ funding on November 8, 2024 with responses due on November 27, 2024. A panel review of the RFI responses was completed and staff published a list of qualified developers on January 27, 2025.

Applications may be submitted to State HCD for Homekey+ funding from January 30, 2025 to May 30, 2025.

Homeownership Activities

The County of Orange homeownership program information can be found on the website at www.ochcd.org/housing-development/homeowner-program.

Mortgage Assistance Program/CalHome Grant

On August 25, 2020, the Board approved the recommended policy changes to the Mortgage Assistance Program (MAP) guidelines. The County's MAP Program provides silent (deferred payment) down payment assistance loans to assist low-income first-time homebuyers (FTHB). The revised guidelines have allowed the County to effectively support FTHB by increasing the maximum loan amount of down payment assistance to qualified individuals and reducing some barriers for eligibility. The guidelines were also revised to make them consistent with changes in funding, Department name changes and the needs of low-income homebuyers in Orange

County. For more information on the MAP program, please contact Sherluna Vien of OC Housing & Community Development at 714-480-2936 or Sherluna.Vien@occr.ocgov.com.

Since the update to the MAP program in August 2020, 109 applications have been processed for eligibility of which 8 have closed escrow, 12 have received a funding commitment pre-approval, and 3 applications are under review.

The MAP program re-opened as of January 23, 2023, and is accepting applications. Funds are limited for this program. Applications are accepted on a first-come first-serve basis. At this time, it is anticipated that 4 more CalHome applications can be funded. Once funds are depleted, the program will be closed and the remaining applicants who have been pre-approved will be placed on a waiting list, in anticipation of future CalHome funds.



OC Community Resources
M E M O R A N D U M

DYLAN WRIGHT
 DIRECTOR
 OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
 ASSISTANT DIRECTOR
 OC COMMUNITY RESOURCES

JOANNE VEEDOR
 DIRECTOR
 ADMINISTRATIVE SERVICES

MONICA SCHMIDT
 DIRECTOR
 OC ANIMAL CARE

JULIA BIDWELL
 DIRECTOR
 OC HOUSING &
 COMMUNITY DEVELOPMENT

RENEE RAMIREZ
 DIRECTOR
 OC COMMUNITY SERVICES

PAM PASSOW
 DIRECTOR
 OC PARKS

JULIE QUILLMAN
 COUNTY LIBRARIAN
 OC PUBLIC LIBRARIES

DATE: February 27, 2025

TO: H&CD Commission

FROM: Bill Malohn, Manager, OC Community Resources
 Accounting *Bill Malohn*

SUBJECT: ACCOUNTING STATUS REPORT - January 2025

ORANGE COUNTY HOUSING ASSISTANCE

1. **Section 8 Housing Assistance Payments**
 We issued our January 3rd checks and electronic fund transfers to landlords on time using the HAPPY software system.
2. **Landlord and Tenant Overpayments**
 - Active: There are 24 tenant repayment agreements with a total balance of \$35,054 as of January 31, 2025.
 - Inactive: There are 344 outstanding cases with a total amount of \$734,317 as of January 31, 2025. Of the 344 cases, 228 are for tenants (66%) and 116 are for landlords (34%).
 - Grand total of active and inactive for January 2025: \$769,371.
3. **Operating Reserves Loan**
 All loan payments were made through January 31, 2025, in accordance with the amortization schedule.
4. We completed the Family Self-Sufficiency (**FSS**) reconciliation through December 2024. There were zero payments to program participants under the Enhancement Program for the month of January.

HOUSING AND COMMUNITY DEVELOPMENT

5. **CDBG, HOME, ESG, CALHOME, and General Fund**
 - The Community Development Block Grant (CDBG), Home Investment Partnership Act (HOME), and Emergency Shelter Grant (ESG) IDIS Vouchers and drawdown for December 2024 have been completed for all available funding.
 - The HUD Status Report, including reconciliation with IDIS for CDBG, HOME, and ESG for December 2024 has been completed.
 - General & Other Fund Projects report was updated through 2nd Quarter, December 2024.
 - Program Income Status Report for December 2024 has been completed.

- We were awarded \$1,000,000 in CalHome funds in March 2010. We received \$1,000,000 in advanced funds as of February 28, 2014 and we funded 44 Owner Occupied Rehabilitation loans. A new 2011 CalHome grant for \$1,000,000 was awarded and \$250,000 was received on June 5, 2014, another \$250,000 was received on April 15, 2015 and another \$250,000 was received on March 8, 2016. We funded 7 Mortgage Assistance Program loans and 14 Owner Occupied Rehabilitation loans. As of June 2017, the 2011 CalHome grant is closed.

ORANGE COUNTY DEVELOPMENT AGENCY (OCDA) SUCCESSOR

6. The Orange County Development Agency (OCDA) Successor status report was updated through December 2024 and can be viewed on the shared drive.
7. Successor Notes Receivable interest and loan monitoring fees are calculated monthly and are up to date as of February 2025. Balances are reconciled for Successor Notes Receivables every April and June.