



FINAL RELOCATION PLAN FOR
THE
BRISTOL STREET PHASE 4 PROJECT (Final)
FROM WARNER AVE TO ST. ANDREW PL.

PREPARED FOR:



CITY OF SANTA ANA
20 Civic Center Plaza
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BY:

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INTRODUCTION

The City of Santa Ana (“City”) has been battling a traffic problem for years. As the population increases, travel conditions are expected to worsen and the current infrastructure will not be able to handle the area’s transportation, mobility and accessibility needs. In order to help alleviate traffic conditions, the City has proposed the Bristol Street Improvements – Warner Avenue to Saint Andrew Place Phase 4 (“Project”), which will improve Bristol Street from a current four-lane roadway to a six-lane roadway. In addition to, the installation of wider sidewalks, ADA compliant curb ramps, and bike lanes. The proposed improvements have been designed to provide safe travel for pedestrians, bicyclists, transit riders, and motorists. Funding for this project includes OCTA Measure M2 Fund, and OCTA Gas Tax.

In order for the Project to move forward, the City will be obligated to acquire property, and relocate affected residents and businesses. Existing structures will be demolished once properties have been vacated. The Project will result in the displacement of 13 single family residence dwellings and 1 mixed use residence/commercial. For commercial there are 13 structures and 1 billboard. The number of proposed displacements requires the preparation of a Relocation Plan (“the Plan”) pursuant to Federal and State relocation laws. To adequately plan for the displacement of the residents and businesses, the City contracted Epic Land Solutions, Inc. (“Epic”) to prepare the Plan. The Plan incorporates policies and procedures which conform with statutes and regulations established by the Federal Uniform Relocation Assistance and Real Property Acquisition Policies Act – “The Uniform Act” (42 U.S.C 460/et seq.), the Federal Relocation Regulations (Title 49 Code of Federal Regulations, Part 24), the California Relocation Assistance Law, Government Code Section 7260, et seq. (Law), the Relocation Assistance and Real Property Acquisition Guidelines adopted by the Department of Housing and Community Development and Title 25, California Code of Regulations Section 6000, et seq. (Guidelines).

The purpose of the Plan is to determine the impact of the project on displaced residents and businesses, as well as provide an estimate of the relocation cost, and reassure that adequate relocation assistance and resources will be available to the displaced persons.

The Plan is organized in five sections:

1. The regional and specific location of the Project (**SECTION I**);
2. An assessment of the relocation needs of those persons subject to displacement as a result of the Project (**SECTION II**);
3. A description of the policies and procedures that the City will follow to meet the displace needs and ensure compliance with federal law (**SECTION III**);
4. An assessment of replacement housing opportunities within the City of Santa Ana area (**SECTION IV**);
5. Necessary administrative provisions (**SECTION V**).

I. THE REGIONAL AND SPECIFIC LOCATION OF THE PROJECT

REGIONAL SETTING

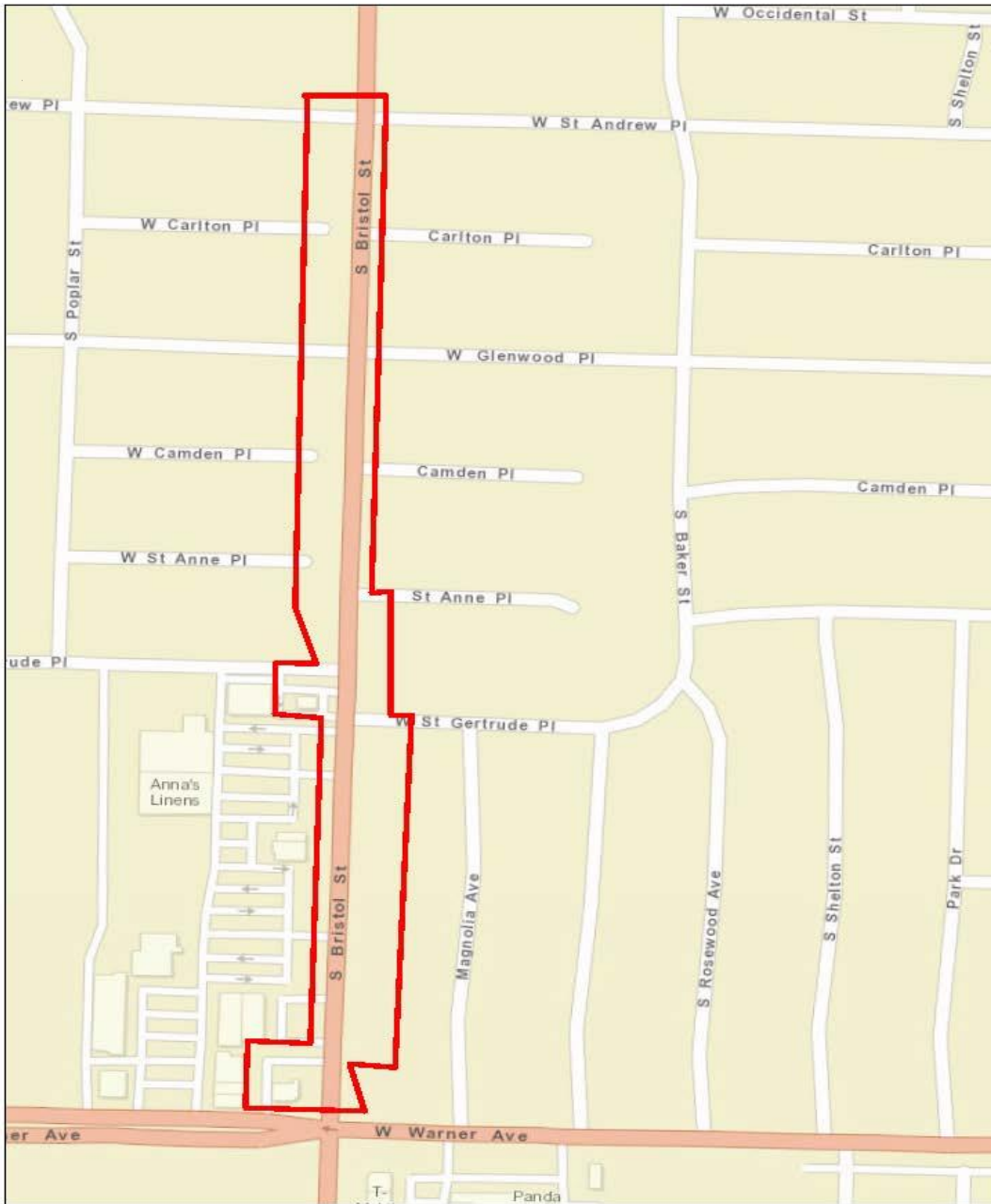
The Project is located in between three US Highways the 5, 22 and 55 in Orange County.



PROJECT AREA DESCRIPTION

The improvements of Bristol Street from Warner Avenue to Saint Andrew Place will accommodate the west side of Bristol, to align with a previously widened section. Improving Bristol Street Corridor will benefit the City greatly, since it is currently designated as a Major Arterial Highway in Orange County and serves as a vital north-south transportation link which has regional as well as local significance. The roadway implement complete street features by providing safe mobility for all users.

PROJECT AREA LOCATION



GENERAL DEMOGRAPHIC AND HOUSING CHARACTERISTICS

Santa Ana is the second most populous city in Orange County, California. Santa Ana is located in Southern California, adjacent to the Santa Ana River, about 10 miles away from the California coast. Now fully developed, Santa Ana has several distinct districts. The core of the city is the downtown area, which contains both retail and housing, as well as the Santa Ana Civic Center which is a dense campus of administrative buildings for both the city and the County of Orange.

According to the 2010 U.S. Census, the population of the City of Santa Ana is 324,528, the population of the impacted Census Tract 741.03 and 741.02 is 11,845, (see Table 1). Corresponding Census data concerning housing mix is shown in Table 2.

TABLE 1 - POPULATION

POPULATION	TRACT 741.03 (USboundary.com)	TRACT 741.02 (USboundary.com)	SANTA ANA (Census 2010) PERCENT/QTY
MALE	2553	3511	51.1% / 165,833
FEMALE	2473	3308	48.9% / 158,694
WHITE	2476	2731	45.9% / 148,958
BLACK	45	81	1.5% / 4,867
ASIAN	134	683	10.5% / 34,075
HAWAIIAN/ ISLANDER	15	22	0.3% / 973
NATIVE AMERICAN	64	67	1.0% / 3245
HISPANIC	4612	5753	78.2% / 253,780
OTHER	2101	2992	3.6% / 11,683
UNDER 5 YR OF AGE	410	529	8.9% / 28,882
UNDER 19 YR OF AGE	1733	2049	30.7% / 99,630
OVER 65 YR OF AGE	302	365	6.8% / 22,067
TOTAL	5026	6819	100% / 324,528

TABLE 2 – HOUSING UNITS

TYPE	TRACT 741.03 (USboundary.com)	TRACT 741.02 (USboundary.com)	SANTA ANA (Census 2010) QTY/PERCENT
VACANT HOUSING UNITS	28	44	2,712 / 3.5%
OCCUPIED HOUSING UNITS	897	1273	74,437 / 96.5%
OWNER OCCUPIED	716	871	33,812 / 45.4%
TENANT- OCCUPIED	181	402	40,625 / 54.6%
TOTAL HOUSING UNITS	925	1317	77,149

II. ASSESSTMENT OF RELOCATION NEEDS

RESIDENTIAL RELOCATION IMPACT

SURVEY METHOD

All tenants are being interviewed by agents to determine the family composition of the current residences and explained the relocation process and benefits. As of the date of this report 100% of the displacees have been contacted and/or interviewed inquiries were made of the displacees and household size and composition, length of occupancy, property description, renter's information, owner/occupant information, business use in residence (if applicable), income information, transportation & education, replacement housing preferences, and ethnicity. Interviews and contacts have been done in person and over the phone in the language of the displacee's preference.

FIELD SURVEY DATA- RESIDENTIAL

As of the date of this report our staff has calculated that there will be a total of 13 single family residence dwelling and 1 mixed use of residence/ commercial.

A sample of the residential form used in the interview process is presented as Exhibit D of this report.

1. Current Occupants

This report has identified 6 residential owner occupants and 11 residential tenants.

The project area includes 13 single family residence and 1 mixed use of residence/commercial.

TABLE 3: DESCRIPTION OF DWELLINGS

# of Bedrooms	Zero	One	Two	Three	Four +
# of Units	0	0	1	12	1

TABLE 4: OWNER OCCUPANT IN THE PROJECT AREA

SITE ADDRESS	TAKE	# OF BD/Bath	#of Occupants
1302 W. Saint Anne Pl.	Full	3/2	4
1302 W. Camden Pl.	Full	3/3	1
1301 Camden Pl.	Full	3/1 ½	4
1301 W. Glenwood Pl.	Full	3/2	10
1301 W. Carlton Pl.	Full	3/1 ½	5
1302 W. Saint Andrew Pl.	Full	3/1 ½	5

TABLE 5: TENANTS IN THE PROJECT AREA

SITE ADDRESS	#BD/Bath	TAKE	# of Occupants
2205 S. Bristol St.	3/1	Full	16
2201 S. Bristol St.	2/1	Full	1
1235 W. Saint Gertrude Pl.	3/1	Full	6
1242 Saint Anne Pl.	3/1	Full	5
1301 W. Saint Anne Pl	3/2	Full	3
2034 S. Bristol St.	3/2	Full	10
2115B Bristol St.	2/1	Full	3
1302 W. Camden Pl.	Rents 1 Room	Full	1
1302 W. Camden Pl.	Rents 1 Room	Full	2
1302 W. Camden Pl.	Rents 1 Room	Full	3
1302 W. Carlton Pl.	5/1/2	Full	6

2. *Replacement Housing Needs*

As of the date of this report we will need 3 one-bedrooms, 2 two-bedrooms, 3 three-bedrooms, and 4 four+-bedroom dwellings for the tenants that will be displaced.

As far as the owner occupant composition our surveys display that we will need 1 one-bedroom, 4 three-bedroom dwellings, and 1 four+-bedroom.

TABLE 6: REPLACEMENT HOUSING NEEDED

Bedroom Size	Zero	One	Two	Three	Four +
# Needed-Tenants	0	3	2	3	3
# Needed-Owners	0	1	0	4	1

3. *Income*

During the process of interviewing each household for this Plan, an attempt was made to obtain as much voluntary information as possible regarding the household's income. The income standards for the County of Orange (See Exhibit G) are approved by the U.S. Department of Housing and Urban Development (HUD) to define and determine housing eligibility by income level for 2015.

4. *Ethnicity/Language*

As agents performed interviews they discovered that most families living in the project are of either Latin or Vietnamese descent. Most of them also speak English, Spanish or Vietnamese, but so far agents have not had any complications in communicating with displacees.

5. *Senior/Handicapped Household*

So far there have been 2 handicapped people identified and no senior citizens.

6. *Preferred Relocation Areas*

Most households would like to stay in Santa Ana mainly because of jobs and schools. However, some have no issues moving to surrounding cities such as Costa Mesa or Anaheim.

OCCUPANCY STANDARDS FOR CITY OF SANTA ANA

The City's policy is that there will be no more than 2 persons per room and one person in common living area. The City adheres to the State building code occupancy standard based on square footage of dwellings for households larger than eight members. Referrals to replacement housing provided to occupants may reflect the need for larger accommodations to comply with State and the City of Santa Ana code requirements.

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

METHODOLOGY

One of the main reasons for creating a Relocation Plan is to determine whether comparable, decent, safe and sanitary residential replacement dwellings will be available for residents at the times of displacement; which are within the financial means of the displacee.

RELATED ISSUES

Temporary Housing

It is anticipated that comparable replacement housing will be available at the time of displacement; therefore; there will be no need to rely on temporary relocation resources to meet the needs of the occupants.

Language Issues

Our staff has been able to successfully communicate with residents and business owners without any language barriers.

Preferred Relocation Areas

Most of the Project residents interviewed expressed a preference to remain in or around the local community in order to maintain current access to schools and employment.

NON-RESIDENTIAL RELOCATION IMPACT

ASSESSMENT OF NEEDS

Based on staff observations there will be 13 businesses and 1 billboard impacted. All tenants are being interviewed by agents to determine the business composition of the current businesses and explained the relocation process and benefits. As of the date of this report 100% of the displacees have been contacted and/or interviewed. Inquiries made of the businesses concerned general information of the business, operations, current facility physical features, financial information, equipment and inventory, replacement site requirements, referrals, permits, insurance, advertising, and tax credits/enterprise zones. Contacts and interviews have been done in person and by phone in the language of the business's preference. A sample of the non-residential interview form used in the interview process are presented as Exhibits C of this report.

COMMERCIAL PROJECT OCCUPANTS

TABLE 7: OWNER OCCUPIED BUSINESS IN PROJECT AREA

BUSINESS NAME	SITE ADDRESS	TAKE	TYPE
Tacos Mexico	2102 S. Bristol St.	Full	Restaurant/Food Services
Nunez Corporation/ Professional Mortgage (17 Independent Contractors)	2101 S. Bristol St.	Full	Real Estate/Financial Brokerage
JM Real Estate (8 Independent Contractors)	2223 S. Bristol St.	Full	Real Estate Brokerage
12620 Brookhurst LLC	2105-2109 S. Bristol St.	Full	Dental

TABLE 8: TENANT OCCUPIED BUSINESS IN PROJECT AREA

BUSINESS NAME	SITE ADDRESS	TAKE	TYPE
South Coast Dental Group	2231 S. Bristol St.	Full	Dental
Rental Boutique	2227 S. Bristol St.	Full	Retail Sales
Schaefer Ambulance Service	2215 & 2119 S. Bristol St.	Full	Medical
Botanica Sol	2123 S. Bristol St.	Full	Retail Sales
MMC Marijuana Dispensary	2115A S. Bristol St.	Full	Retail Sales
Dentistry NHA Khoa	2105 S. Bristol St.	Full	Dental
American Smile Dentist	2209 S. Bristol St.	Full	Dental
Lawnmower City	2115 S. Bristol St.	Full	Repair & Service
Outfront Media*	2115 S. Bristol St.	Full	Billboard
Conroy's Flowers	2240 S. Bristol St.	Full	Retail Sales

* One billboard sign has been identified as Outfront Media (Billboard Face No. 5001/6843) located at 2115 S. Bristol Street, Santa Ana, CA 92704.

COMMERCIAL REPLACEMENT RESOURCES

Generally, the businesses that are to be displaced should be able to relocate in the Santa Ana area or surrounding cities. The majority of the business owners indicated a desire to stay in the Santa Ana area.

When searching for replacement locations, zoning and other regulatory issues must be considered carefully. The current availability of general commercial/retail space for lease in Santa Ana is adequate. The search for available properties for lease was conducted in Santa Ana beginning within a five-mile radius of the project site and expanding outward as necessary.

Available replacement sites conducive to auto-related uses within Santa Ana specifically were limited in number and available sites in surrounding cities were researched as well. Special consideration was given to locate available replacement sites within Santa Ana; however, available sites in surrounding communities were also included in the resource table below. The resources utilized to identify available commercial sites included: classified ads, the internet, and multiple listing services.

Table 9 provides a sample of the commercial properties available in the City of Santa Ana and the Greater Orange County area as of the date of this Plan.

TABLE 9: AVAILABLE COMMERCIAL REPLACEMENT SITES

TYPE	TOTAL SPACES	SQUARE FOOTAGE RANGE	RENT RANGE \$/SF/YR	MEDIAN \$ SF/YR	R=FOR RENT S=FOR SALE	SALE PRICE RANGE (1000)
Retail	5	800 to 5,200	21 to 29.40	25.20	R	N/A
Manufacturing	4	625 to 2,880	12.60 to 28.20	20.40	R	N/A
Office	9	300 to 5,567	11.40 to 43.20	27.30	R	N/A
Restaurant	3	863 to 4,900	18 to 27	22.50	R	N/A
Warehouse	4	3,061 to 6,000	10.80 to 18	14.00	R	N/A
Medical Office	3	975 to 2,475	7.14 to 30	18.57	R	N/A
Special	1	3,000 to 4,031	7.44	7.44	R	N/A
Office	5	1,798 to 5,000	N/A	N/A	S	800 to 2,360
Restaurant	3	2,446 to 5,480	N/A	N/A	S	4,693 to 5,561
Office Condo	2	2,035 to 4,404	N/A	N/A	S	735 to 1,060
Industrial	2	2,700 to 3,600	N/A	N/A	S	736 to 2,000
Retail	2	3,600 TO 4,50	N/A	N/A	S	2,000 to 4,500
Medical Office	1	4,400	N/A	N/A	S	1,050

III. THE RELOCATION PROGRAM

NON-RESIDENTIAL RELOCATION PROGRAM

NON-RESIDENTIAL ADVISORY SERVICES

The City has two programs, Relocation Advisory Assistance Program and Relocation Payments Program, to aid businesses, farms and nonprofit organizations which must relocate. In addition, if the displacee chooses to take full responsibility for all part of the move of the business, farm, or nonprofit organization, the City may approve not to exceed the lower of the two bids obtained by the City from qualified moving firms.

RELOCATION BENEFITS

- 1) Relocation Advisory Assistance Program, which is to aid you displacee locating a suitable replacement property; and
- 2) The Relocation Payments Program, which is to reimburse displacee for certain costs involved in relocating. These payments are classified as:

Moving and Related Expenses (costs to move personal property not acquired);

Search Expenses (expenses related to finding a replacement);

Reestablishment Expenses (expenses related to the replacement property); and

In-Lieu Payment (a fixed payment in lieu of moving and related expenses, and reestablishment expenses).

MOVING EXPENSES

Actual Reasonable Moving Costs – Business owners may be paid for actual reasonable moving costs and related expenses when a commercial mover performs the move. Reimbursement will be limited to a move 50 miles or less. Related expenses, with limitations, may include:

- Transportation;
- Packing and unpacking personal property;
- Disconnecting and reconnecting personal property related to the operation;
- Temporary storage of personal property;
- Insurance while property is in storage or transit, or the loss and damage of personal property if insurance is not reasonably available;
- Expenses in finding a replacement location (\$2,500 limit);
- Professional services to plan and monitor the move of the personal property to the new location; and
- Licenses, permits and fees required at the replacement location.

Self-Move Agreement – Business owners may also be paid to move their own personal property based on the lower of two acceptable bids obtained by the City.

IN-LIEU PAYMENT

A small business may be eligible to accept a fixed payment between \$1,000 and \$40,000, based on their annual earnings In Lieu of the moving cost and related expenses.

ACTUAL REASONABLE MOVING COSTS

A business may be paid the actual reasonable and necessary and necessary costs of their move when a professional mover performs the move. All of your moving costs must be supported by paid receipts or other evidence of expenses incurred. In addition to the transportation costs of their personal property, certain other expenses may also be reimbursable, such as packing, crating, unpacking and uncrating, and the disconnecting, dismantling, removing, reassembling, and reinstalling relocated machinery, equipment, and other personal property.

Other expenses such as professional services necessary for planning and carrying out the move, temporary storage costs, and the cost of the licenses, permits and certifications may also be reimbursable. This is not intended to be an all-inclusive list of moving related expenses.

SEARCHING EXPENSES FOR REPLACEMENT PROPERTY

A displaced business, farm or nonprofit organization is entitled to reimbursement for actual reasonable expenses, not to exceed \$2,500. Expenses may include transportation, meals, and lodging when away from home. Reasonable time spent during the search, fees paid to the real estate agents, brokers or consultants, and other expenses, may be reimbursable, but only if determined to be reasonable and necessary by the City.

REESTABLISHMENT EXPENSE

A small business, farm or nonprofit organization may be eligible for a payment, not to exceed \$25,000, for expenses actually incurred in relocating and reestablishing the enterprise at a replacement site.

Reestablishment expenses may include but are not limited to the following:

1. Repairs or improvements to the replacement real property required by Federal, State or local laws, codes or ordinances;
2. Modifications to the replacement of real property to make the structure(s) suitable for the business operation;
3. Construction and installation of exterior signing to advertise the business;
4. Redesign or replacement such as, interior painting, wallpapering, paneling or, carpeting if/when required by the condition of the replacement site or for aesthetic purposes;

5. Advertising the new business location;
6. The estimated increased costs of operation at the replacement site during the first two years, for items such as:
 - A) Lease or rental charges;
 - B) Personal or real property taxes;
 - C) Insurance premiums; and
 - D) Utility charges (excluding impact fees).
7. Other items that the City considers essential for the reestablishment of the business or farm.

OUTDOOR ADVERTISING SIGNS

Eligibility for this payment exist whether or not the business had a sign at the displacement property. However, some sign expense is more properly assigned as a moving cost. A sign designated as personal property at the displacement site is eligible to be moved and reinstalled as a moving expense. Signs that can be re-lettered or otherwise modified due to the move can be claimed as a moving expense. Erection of signs not eligible as a moving expense can generally be claimed as a reestablishment expense.

LOSS OF BUSINESS GOODWILL

As with any project of this magnitude some businesses are often more difficult to relocate than others due to zoning and other regulatory and basic locational considerations. While certain problem areas have already been identified and based upon experience are considered not insurmountable, consideration for "Loss of Goodwill" may subsequently be an option pursued by some businesses.

In this regard, State law (California Code of Civil Procedure Section 1263.510) requires the owner to establish the validity of all of the following: (1) The loss is caused by the taking of the property; (2) The loss cannot reasonably be prevented by relocation of the business, or by taking steps and adopting procedures that a reasonably prudent person would take to preserve the goodwill; and (3) the compensation for the loss has not been included as a relocation payment or duplicate in compensation otherwise awarded to the owner.

Goodwill consists of the benefits that accrue to a business as a result of its location, reputation for dependability, skill or quality and any other circumstances resulting in probable retention of old or acquisition of patronage. If a claim for loss of goodwill is to be made it must be filed after displacement has occurred allowing sufficient time to enable determination of loss, if any.

The process of claiming Loss of Goodwill, however, occurs outside the scope of relocation assistance.

RESIDENTIAL RELOCATION PROGRAM

RESIDENTIAL ADVISORY SERVICES

Epic's relocation staff will be available to provide advisory services to the residents throughout the relocation process.

Advisory services include: meeting with each household individually and in a group meeting; explaining the relocation process; providing notices; assisting in locating replacement housing; providing information on applicable First Time Homebuyer programs; explaining claim forms and options; completing claim forms; and ensuring timeliness of processing claim forms. Relocation staff will be available to answer questions and address issues.

RELOCATION BENEFITS

Residential Moving Expense Payments

All displaced residential occupants will be eligible to receive a payment for moving expenses. Moving expense payments will be made based upon the actual cost of a professional mover or a fixed payment based on a room count schedule.

Actual Cost (professional move)

The Relocation Agent shall explain to the displacee the availability of the option of receiving actual reasonable moving expenses, as the basis of payment for moving costs. The agent will fully explain the types of expenses that are reimbursable and review the eligible items contained in the brochure.

If the occupant selects actual reasonable moving expenses as the basis of payment for moving expenses the Relocation Agent will explain to the displacee that they must obtain at least two bids from a professional moving company and provide copies to the agent for evaluation. The agent can also assist the displacee in obtaining these bids.

Fixed Payment (based on room count schedule)

An occupant may elect to receive a fixed payment for moving expenses, which is based on the number of rooms occupied in the displacement dwelling. In this case, the displaced person takes full responsibility for the move.

This fixed moving payment is in accordance with the established Federal Highway Administration schedules maintained by California Department of Transportation. The current schedule for fixed moving payments in California is in the table below:

TABLE 10: FIXED MOVING PAYMENT SCHEDULE

FURNISHED DWELLINGS	
Number of Rooms	Payment Amount
One room	\$725
Two rooms	\$930
Three rooms	\$1,165
Four rooms	\$1,375
Five rooms	\$1,665
Six rooms	\$1,925
Seven rooms	\$2,215
Eight rooms	\$2,505
Each additional room	\$265

UNFURNISHED DWELLINGS	
Number of Rooms	Payment Amount
One room	\$475
Each additional room	\$90

Rental Assistance for 90-day Residential Tenants

Residential tenants who have established their residency within the Project area for a minimum of 90 days prior to the initiation of negotiations and who choose to re-rent may be eligible to receive Rental Assistance Payments in addition to a Moving Expense Payments.

Agents use the following to determine the maximum rental benefits for the displacees:

- Agent will verify current rent for displacement dwelling. This can be done by getting rent receipts, copy of lease the agreement or canceled checks;
- Determine what utilities the tenant is responsible for. Utility costs usually include electricity, gas and water;
- Agent will also determine what the household income is. They will do this by gathering all the means of income received as a household for a 12 month period, such as earned wages, salary, child support, alimony, unemployment benefits, worker's compensation, social security and net income from business; and
- If a household is determine to be low income then their benefits are calculated by using 30% of the gross monthly income.

Payments to Non-Tenured Residential Tenants

Non low-income residential tenants with less than 90 days of continuous occupancy prior to the City's acquisition offer presented to the owner will only be eligible to receive a moving expense.

The table below is an example of how a rental assistance payment is calculated by using the rent to rent method:

TABLE 11: RENTAL ASSISTANCE PAYMENT CALCULATION (RENT to RENT)

Rent and Utilities at Displacement Dwelling	\$1,200.00
Annual Household Income	\$50,000.00
Number of Occupants of Household	5
Location of displacement dwelling	Orange County
Low income threshold	\$47,250.00
Base monthly rental (lesser of 1 of 4)	\$1,200.00
Comparable rent and utilities	\$1,250.00
Computation of payment \$1,250 minus \$1,200 \$50 x 42 months	\$2,100.00

TABLE 12: EXAMPLE OF PAYMENT CALCULATED FOR A LOW INCOME DISPLACED:

Rent and Utilities at Displacement Dwelling	\$1,200.00
Annual Household Income	\$46,000.00
Number of Occupants of Household	5
Location of displacement dwelling	Orange County
Low income threshold	\$47,250.00
30% of monthly household income (\$46,000 divided by 12 x 30%)	\$1,150.00
Base monthly rental (lesser of 1 or 4)	\$1,150.00
Comparable rent and utilities	\$1,250.00
Computation of Payment \$1,250 minus \$1,150 \$100 x 42 months	\$4,200.00

Down Payment Assistance to Tenants Who Purchase

Residential displacees eligible to receive a rental assistance payment, may choose to utilize up to the amount of their rental assistance eligibility (including any Last Resort benefits) to purchase a replacement dwelling, provided that the entire eligibility amount is used toward the down payment and eligible incidental closing costs. In the case of Down payment Assistance claims, the City will arrange for the deposit of the total rental assistance eligibility amount in an open escrow account. Provisions will be included in the

escrow instructions to assure the prompt return of all the City funds in the event escrow is cancelled by either party or should fail to close within a reasonable period of time.

Payments to Non-Tenured Residential Tenants

Residential tenants with less than ninety days (90) of continuous occupancy prior to the initiation of negotiations will be eligible to receive only a payment of moving expenses.

Replacement Housing Payments to Owner-Occupants

Residential owner-occupants who have established residency for at least 180 days prior to the City's offer to purchase may be eligible for a replacement housing payment determined by the aggregate value of three separate compensation elements: a) Purchase Price Differential; b) Mortgage Interest Differential; and, c) Incidental Expenses.

Purchase Price Differential

The Purchase Price Differential is based on three factors:

The final price paid by the City for a replacement dwelling; and,

The cost of a decent, safe and sanitary dwelling comparable to the dwelling acquired by the City.

The purchase price differential amount is determined by comparing the final acquisition price of the Project residence to the lesser of the actual price paid for a replacement home or the price of a comparable available decent, safe and sanitary dwelling. If the purchase price of a replacement home is less than the cost of a comparable replacement home, the payment will be limited to the actual difference. If the purchase price exceeds the cost of a comparable replacement home, the payment will be based on the cost of the comparable replacement home.

Replacement housing referrals to owner-occupants will match, as closely as possible, current housing circumstances. The calculation of purchase price differential payments to owner-occupants of multifamily properties will be determined by comparing the pro-rated value of the comparable element of a replacement property.

Mortgage Interest Differential

The Mortgage Interest Differential Payment is intended to compensate homeowners for any increase in interest costs between the acquired dwelling and the replacement dwelling. Computation of the payment is based upon three factors: 1) the remaining term and amount(s) of the current mortgage or mortgages 2) the current type of mortgage product (i.e. fixed vs. variable) 3) a comparison of the mortgage interest rate for the acquired dwelling relative to the lesser of the current market rate or the actual new rate for a similar mortgage product. To be eligible for this payment, the mortgage on the dwelling being acquired must have been in place, as a valid lien, for at least 180 days prior to the City's initial written offer to purchase.

Incidental Expenses – Closing Costs

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

Owner Occupants Relocations

For this project there are approximately 6 owner occupants that will have to be relocated. Owner occupants are eligible to receive moving benefits, purchase price differential and non-recurring cost.

Tenant Relocations

Upon our staff research it was discovered that at least two single family homes have multiple families living in them. In addition, there is also one Section 8 household that was identified.

IV. ASSESSMENT OF AVAILABLE RESOURCES

REPLACEMENT HOUSING AVAILABILITY

From our research it does not appear like there will be any issues in finding replacement housing in and around the area.

TABLE 13: RESIDENTIAL RELOCATION RESOURCES- RENTALS

ADDRESS	UNIT TYPE	# OF BED/BATH	MONTHLY RENT
	<i>RENTALS</i>		
1330 N Bush St #44, Santa Ana, CA	APT	1/1	\$1,150
1313 W. Memory Ln, Santa Ana, CA	APT	1/1	\$1,295
3663 S. Bear St, Santa Ana, CA	APT	1/1	\$1,295
2414 N. Tustin Ave, Santa Ana, CA	APT	1/1	\$1,310
811 S. Fairview St, Santa Ana, CA	APT	1/1	\$1,315
2701 W. McFadden Ave, Santa Ana, CA	APT	1/1	\$1,360
1507 N Durant St #55, Santa Ana, CA	APT	2/2	\$1,400
1026 Highland St, Santa Ana, CA	Townhouse	2/1.5	\$1,425
1423 S. Sycamore St, Santa Ana, CA	APT	2/1	\$1,456
1313 W. Memory Ln, Santa Ana, CA	APT	2/1	\$1,505
1101 W. Stevens Ave, Santa Ana, CA	APT	2/1	\$1,573
1001 W. Stevens Ave. Apt. 415, Santa Ana, CA	Condo	2/2	\$1,650
1460 Cabrillo Park Dr., Santa Ana, CA	Condo	2/1	\$1,695

1600 E. 17th St, Santa Ana, CA	APT	2/1	\$1,695
2701 W. McFadden Ave, Santa Ana, CA	APT	2/1	\$1,740
2837 S. Fairview St, Santa Ana, CA	Condo	2/2	\$1,750
811 S. Fairview St, Santa Ana, CA	APT	2/1	\$1,790
2414 N. Tustin Ave, Santa Ana, CA	APT	2/1	\$1,790
1010 W. MacArthur Blvd, Santa Ana, CA	Condo	2/1	\$1,800
1437 E. Century Dr., Orange, CA	SFR	2/1	\$2,800
2101 S Pacific Ave, Santa Ana, CA	SFR	3/1.5	\$1,750
2245 Franzen Ave, Santa Ana, CA	APT	3/2	\$2,275
2211 Ponderosa St, Santa Ana, CA	Townhouse	3/2	\$2,400
4414 W. Moonridge Ave, Santa Ana, CA	SFR	3/2	\$2,450
1707 N. Olive St, Santa Ana, CA	SFR	3/1	\$2,600
2009 W. Summer Wind, Santa Ana, CA	Townhouse	3/2	\$2,700
1009 Virginia Ave, Santa Ana, CA	SFR	3/2	\$2,750
2202 S. Flower St, Santa Ana, CA	SFR	4/2	\$2,600
10531 Ridgeway Dr, Santa Ana, CA	SFR	4/2	\$3,695
1909 W. Blackhawk Dr, Santa Ana, CA	SFR	5/4	\$4,600
2720 N. Via Real Dr., Orange, CA	SFR	7/6.5	\$9,500

TABLE 14: RESIDENTIAL RELOCATION RESOURCES- FOR SALE

ADDRESS	UNIT TYPE	# OF BED/BATH	PRICE
	<i>FOR SALE</i>		
633 S. Shelton St, Santa Ana, CA	SFR	2/1	\$365,000
411 Highland St, Santa Ana, CA	SFR	2/1	\$380,000
1021 W. Chestnut Ave, Santa Ana, CA	SFR	3/1	\$399,950
920 W. Myrtle St, Santa Ana, CA	SFR	3/1	\$435,000
2302 W. La Verne Ave, Santa Ana, CA	SFR	3/1	\$438,000
323 W. 18th St, Santa Ana, CA	SFR	3/1	\$445,000
2027 S. Broadway, Santa Ana, CA	SFR	3/1	\$445,000
1721 W. Civic Center Dr, Santa Ana, CA	SFR	3/1	\$448,000
706 N. Eastwood Ave, Santa Ana, CA	SFR	3/1.5	\$460,000
2616 Park Lk., Santa Ana, CA	SFR	3/2	\$270,000
300 Carriage Dr., Santa Ana, CA	SFR	3/2	\$248,000
1030 S. Orange Ave, Santa Ana, CA	SFR	3/2	\$335,000
1657 W. Cubbon St, Santa Ana, CA	SFR	3/2	\$445,000
2245 S. Lowell St, Santa Ana, CA	SFR	3/2	\$445,000
602 S. Rosewood Ave, Santa Ana, CA	SFR	3/2	\$450,000
929 S. Virlee St, Santa Ana, CA	SFR	3/2	\$479,999

HOUSING OF LAST RESORT

“Last Resort Housing” payments are authorized by statute if affordable comparable replacement housing is not available; i.e. housing costing not more than 30% of the household’s average monthly income. In this case, payments may be made beyond the \$7,200 statutory cap up to 42 months of rental assistance. Relocation will not be considered complete until all households qualifying for relocation have been relocated to comparable, decent, safe, and sanitary housing units.

V. NECESSARY ADMINISTRATIVE PROVISIONS

ADMINISTRATIVE PROVISIONS

PAYMENT OF RELOCATION BENEFITS

Claims and supporting documentation for relocation benefits must be filed with the City within 18 months from:

- The date the claimant moves from the acquired property; or,
- The date, on which final payment for the acquisition of the real property is made, whichever is later.

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

- Claimant(s) will provide all necessary documentation to substantiate eligibility for assistance;
- Payment amounts will be determined in accordance with the provisions of the Federal relocation law and guidelines;
- Required claim forms will be prepared by relocation personnel and reviewed with claimants. Signed claims and supporting documentation will be submitted by Epic staff to the City.
- The City will review all claims for payment and determine whether to approve, deny, or seek additional information;
- The City will issue benefit checks for distribution to claimants by relocation staff;
- Final payments will be issued only after confirmation that the Project premises have been completely vacated and occupancy of the replacement unit is verified;
- All correspondence, back-up documentation, claims, receipts of payment and notices will be maintained in the relocation file.

RELOCATION TAX CONSEQUENCES

In general, relocation payments are not considered income for the purpose of the Internal Revenue Code of 1968 or the Personal Income Tax Law, Part 10 of the Revenue and Taxation Code.

The above statement on tax consequences is not intended to be provision of tax advice by the City or their consultants. Displacees are encouraged to consult with their own tax advisors concerning the tax consequences of relocation payments.

NOTICES

The notices used in this project are outlined in Exhibits A- F for review.

IMMIGRATION STATUS

Under the Uniform Act residents not lawfully present in the United States are not eligible to receive relocation payments and assistance, however the City at their discretion may approve payments to residents not lawfully present in the United States.

EVICTION POLICY

Eviction of occupants by the City will be pursued only as a last resort, with the exception of a person considered to be an unlawful occupant. A displaced person's eviction may affect eligibility for relocation assistance and benefits. Relocation records must be documented to reflect the specific circumstances surrounding the eviction.

Eviction by the City may be undertaken for one, or more of the following reasons:

- Failure to pay rent, except in those cases where failure to pay is due to the City's failure to keep the premises in habitable condition is the result of the City's harassment or retaliatory action or is the result of the City's discontinuation of substantial interruption of services;
- Performance of a dangerous or illegal act in or upon the premises by the lessee;
- Material breach of the rental agreement by lessee and failure to correct said breach within 30 days of notice to cure;
- Maintenance of a nuisance by lessee and failure to abate such nuisance within a reasonable number of offers of replacement dwellings;
- Refusal of lessee to accept one of a reasonable number of offers of replacement dwellings; and
- A requirement under State or local law or emergency circumstances such that it (the eviction) cannot be prevented by any other reasonable efforts on the part of the public entity.

APPEALS POLICY

All displaced persons will be informed of their right to appeal the City's determination as to eligibility for payment or to the amount of the relocation payment. The right of appeal will be described in all brochures and other informational material distributed to the public.

Procedures have been established which assure each appellant's grievance will be heard. The procedures insure that:

Each appellant has the opportunity for oral presentation;

Each appeal will be decided promptly and the appellant informed of the decision in writing;

Each appeal decision will include a statement of the reasons upon which it is based; and

Each appellant will have a right of final appeal to a higher authority.

These grievance procedures only apply to the City's Relocation Assistance Program. Judicial appeal also may be pursued if an appellant is not satisfied with the City's administrative determination.

CITIZEN PARTICIPATION

As the process for considering the Project to move forward, the City will observe the following protocol:

- Provide affected displacees with full and timely access to documents relevant to the relocation program;
- Encourage meaningful participation in reviewing the Relocation Plan and monitoring the relocation assistance program; including the project area occupants;
- Provide technical assistance necessary to interpret elements of the Relocation Plan and other pertinent materials; and
- Issue a general notice concerning the availability of the Plan for public review, as required, 30 days prior to its proposed adoption. Distribution of the Plan, upon request, to all affected and interested parties.

As of the time of this Plan, the following timeline has occurred or is anticipated:

Date	Status
June 10, 2013	Public Meeting
June 25, 2013	Public Meeting
June 26, 2013	Public Meeting
October 17, 2014	Public Meeting
October 28, 2014	Public Meeting
November 12, 2014	Public Meeting
November 18, 2014	Public Meeting
July 14, 2014	Public Meeting
August 21, 2015	Public Meeting
September 3, 2015	Public Meeting
September 2015	Start Relocation Process
Summer 2017 to Summer 2018	Construction

PROGRAM ASSURANCES AND STANDARDS

The relocation program will be implemented by the City and will conform with the standards and provisions of the Uniform Relocation Act, State of California Relocation Law Government Code Section 7260, et. Seq., Title 25, Chapter 6, Relocation Assistance and Real Property Acquisition, and the Agency’s own Rules and Regulations for Relocation Assistance.

Guidelines adopted by Federal and State agencies will be as follows:

1. To fully inform eligible project occupants of the nature of and procedures for obtaining relocation assistance and benefits;
2. To determine the needs of each residential displacee eligible for assistance;
3. To provide an adequate number of referrals to compare, decent, safe and sanitary housing units within a reasonable time prior to displacement, and assure that no residential occupant is required to move without a minimum of (90) days written Notice to Vacate;
4. To provide current and continuously updated information concerning replacement housing opportunities;
5. To provide assistance that does not result in different or separate treatment due to race, color, religion, national origin, sex, sexual orientation, marital status or any arbitrary circumstances;
6. To supply information concerning Federal and State housing programs and other governmental programs providing assistance to displaced persons;
7. To assist each eligible person with completing applications for benefits;

8. To make relocation benefit payments in accordance with Federal and State guidelines, including the provisions of the Last Resort Housing sections where applicable;
9. To inform all persons subject to displacement of the Agency's policies with regard to eviction and property management; and
10. To establish and maintain a formal grievance procedure for use by the displaced person seeking administrative review of the Agencies decisions' with respect to relocation assistance.

PROJECTED DATES OF DISPLACEMENT

The City has approved the acquisition and relocation activities in September 2015. It is estimated this process will be completed by spring 2017. Construction is scheduled to begin in the summer of 2017 and be completed by summer 2018.

ESTIMATED RELOCATION COSTS

After all the research that was performed by our staff it has been estimated that it will cost a total of \$901,967 for residential relocation benefits, and a total of \$3,463,417 for business relocation benefits that will be affected by the project. Total estimates for relocation benefits for this project is \$4,365,384, these estimates include a 10% contingency.

The estimate **does not** include any compensation for Fixtures & Equipment or Loss of Business Goodwill or include any provision for professional fees necessary to implement the Relocation Assistance Program.

TABLES and EXHIBITS

TABLES

Table 1	Santa Ana - Population
Table 2	Santa Ana - Housing Units
Table 3	Description of Dwellings
Table 4	Owner Occupant in the Project Area
Table 5	Tenants in the Project Area
Table 6	Replacement Housing Needed
Table 7	Owner Occupied Business in Project Area
Table 8	Tenant Occupied Business in Project Area
Table 9	Available Commercial Replacement Sites
Table 10	Fixed Moving Payment Schedule
Table 11	Rental Assistance Payment Calculation (Rent to Rent)
Table 12	Example of Payment Calculated for a Low Income Displacee
Table 13	Residential Relocation Resources – Rentals
Table 14	Residential Relocation Resources – For Sale

EXHIBITS

Exhibit A	General Information Notice – Non- Residential
Exhibit B	General Information Notice- Residential
Exhibit C	Non-Residential Interview Form
Exhibit D	Residential Interview Form
Exhibit E	Non-Residential Brochure
Exhibit F	Residential Brochure
Exhibit G	HUD Income Limits

EXHIBIT A

General Information Notice –Non-Residential

Epic Land Solutions, Inc.

2601 Airport Drive, Suite 130
Torrance, CA 90505

Phone: (310) 626-4848
Fax: (310) 891-3348

Non-Residential Occupant to Be Displaced

(Date)

(Occupant)

Dear (Occupant),

The City of Santa Ana (called here the “Displacing Agency”) is interested in acquiring the property you currently occupy at (Address), Santa Ana, CA (Zip Code) for the Bristol Street Widening Phase IV between Warner Avenue and St. Andrews Place (called here the “Project”). This notice is to inform you of your rights under Federal and/or State law. If the Displacing Agency acquires the property and you are displaced for the Project, you will be eligible for relocation assistance under the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA), as amended.

However, you do not have to move now.

This is not a notice to vacate the premises or a notice of relocation eligibility.

The Displacing Agency has retained the professional firm of **Epic Land Solutions, Inc.**

(“Epic”) to represent the Agency and assist in the relocation process.

In order to assess and better plan for the relocation needs of possible displaced non-residential occupants in the Project, the Displacing Agency is preparing a Relocation Plan. In order to prepare this relocation plan, Epic’s staff will need to meet with you at your place of business to assess your relocation needs. If you want to make an appointment that is convenient for you, please call the relocation agent identified below:

(Agent)

(Agent Phone)

If you rent or lease your unit, you should continue to pay your monthly rent to your landlord because failure to pay rent and meet your obligations as a tenant may be cause for eviction and loss of relocation assistance. You are urged not to move or sign any agreement to purchase or lease a unit before receiving formal notice of eligibility for relocation assistance. If you move or are evicted before receiving such notice, you will not be eligible to receive relocation assistance. Please contact us before you make any moving plans. If the Displacing Agency acquires the property and you are eligible for relocation assistance, you will be given advisory services, including referrals to replacement sites, and at least 90 days advance written notice of the date you will be required to move. You would also receive either a payment for actual moving and reestablishment expenses, or, a fixed payment in lieu of a payment for actual moving and reestablishment expenses

Pursuant to the Public Law 105-117, in order to be eligible to receive non-residential relocation benefits in federally-funded projects, in the case of an unincorporated business, each owner must be either a citizen or national of the United States, or an alien who is lawfully present in the United States. The owner of a sole proprietorship and all owners of a partnership must provide information regarding their lawful presence in the United States, and a for-profit or a non-profit corporation must certify that it is authorized to conduct business within the United States. Owners of sole proprietorships or partnerships, who are not lawfully present in the United States, or who decline to provide this information, are not eligible for relocation assistance, unless such eligibility would result in exceptional hardship to a qualifying spouse, parent, or child. Relocation benefits will be prorated to reflect the number of owners with certified lawful presence in the United States.

Again, this is not a notice to vacate and does not establish eligibility for relocation payments or other relocation assistance. If the Displacing Agency decides not to purchase the property, you will be notified in writing.

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

If you have any questions about this or any other relocation issues, please contact me at the address and the phone number below.

Sincerely,

Ron Wicks
Project Manager
Epic Land Solutions, Inc.

IF REQUIRED:

Carbon Copy To:
(Name and Address)

_____ Delivered on/by: _____/_____
Received by

_____ Posted on/by: _____/_____
Recipient's Signature

_____ Mailed/receipt received on: _____/_____
Date

EXHIBIT B

General Information Notice – Residential

Epic Land Solutions, Inc.

2601 Airport Drive, Suite 130
Torrance, CA 90505

Phone: (310) 626-4848
Fax: (310) 891-3348

Residential Occupant to Be Displaced

(Date)

(Occupant)

Dear (Occupant),

The City of Santa Ana (called here the “Displacing Agency”) is interested acquiring the property you currently occupy at (Address), Santa Ana, CA, (Zip Code) for the Bristol Street Widening Phase IV between Warner Avenue and St. Andrews Place (Project). This notice is to inform you of your rights under Federal and or State law. If the Displacing Agency acquires the property and you are displaced for the Project, you will be eligible for relocation assistance under the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA), as amended.

However, you do not have to move now.

This is not a notice to vacate the premises or a notice of relocation eligibility.

The Displacing Agency has retained the professional firm of **Epic Land Solutions, Inc.**

(“Epic”) to represent the Agency and assist in the relocation process.

In order to assess and better plan for the relocation needs of possible displaced households in the Project, the Displacing Agency is preparing a Relocation Plan. In order to prepare this relocation plan, Epic’s staff will need to meet with you to assess your relocation needs. If you want to make an appointment that is convenient for you, please call the relocation agent identified below.

(Agent)

(Agent Phone)

If you rent your unit, you should continue to pay your monthly rent to your landlord because failure to pay rent and meet your obligations as a tenant may be cause for eviction and loss of relocation assistance. You are urged not to move or sign any agreement to purchase or lease a unit before receiving formal notice of eligibility for relocation assistance. If you move or are evicted before receiving such notice, you will not be eligible to receive relocation assistance. Please contact us before you make any moving plans.

If the Displacing Agency acquires the property and you are eligible for relocation assistance, you will be given advisory services, including referrals to replacement housing, and at least 90 days advance written notice of the date you will be required to move. You would also receive a payment for moving expenses and may be eligible for financial assistance to help you rent or buy a replacement dwelling. Any person aggrieved by a determination as to eligibility for, or the amount of, a payment authorized by the Displacing Agency's Relocation Assistance Program may have the appeal application reviewed by the Displacing Agency in accordance with its appeals procedure. Complete details on appeal procedures are available upon request from the Displacing Agency.

Note that pursuant to Public Law 105-117, aliens not lawfully present in the United States are not eligible for relocation assistance, unless such ineligibility would result in exceptional hardship to a qualifying spouse, parent, or child. All persons seeking relocation assistance will be required to certify that they are a United States citizen or national, or an alien lawfully present in the United States.

Again, this is not a notice to vacate and does not establish eligibility for relocation payments or other relocation assistance. If the Displacing Agency decides not to purchase the property, you will be notified in writing.

If you have any questions about this or any other relocation issues, please contact me at the address and the phone number below.

Sincerely,

Ron Wicks
Project Manager
Epic Land Solutions, Inc.

_____ Delivered on/by: _____ / _____
Received by

_____ Posted on/by: _____ / _____
Recipient's Signature

_____ Mailed/receipt received on: _____ / _____
Date

EXHIBIT C

Non - Residential Interview Form



Non-Residential Interview Form

Project Name:	Bristol Street Widening Phase IV between Warner Ave. & St. Andrew Place
Property Owners:	
Parcel Number:	
Displacee:	
Case Number:	

Owner Tenant Owner/Occupant

Interviewer: _____ Relocation Company: Epic land Solutions, Inc.

Street Address: _____

Unit Number: _____ City: _____ Zip: _____ **Date of Interview:** _____

Business Occupancy Survey

1. Respondent: _____

2. Primary Language Spoken in business: English Spanish Korean Other: _____

2a. In what language, other than English, do you request written material be submitted to you?
Spanish Korean Other: _____

3. Position with Business (Check all that apply): Owner Business Manager Employee Other: _____

General Information

4. Legal Business Name _____

IMPORTANT: This name will be used for case files & will appear on checks (as "payee") – i.e., checks will be made out to the name appearing on this line (4) – so make sure it is linked to a checking account and can be cashed!

5. Doing Business As (DBA): _____ DBA registered? Yes No

6. Mailing Address (if different from street address, above): _____

_____ City: _____ Zip: _____

7. Phone No: _____ Cell: _____ Fax No: _____ Email _____

8. Type of Business (Check all that apply): Retail Manufacturing Service Wholesale Other: _____

9. What is the business structure of your company?

9a. Sole Proprietorship Partnership Corp Franchise Non-Profit LLC

9b. Do you have any of the following?

Federal Tax Identification Number

Business License

Non-Profit Tax Exempt Status If so, what is the #? _____

9c. Federal Taxpayer Identification Number -

Social Security Number --

Initials of Respondent: _____

Initials of Interviewer: _____

10. Who are the owners(s) of the business and how can they be reached? (Write down names of all owners beginning with the primary contact person):

Name	Phone Number

11. Business Manager Name: _____

11a. Business Manager Phone No: _____ Fax No: _____ Email: _____

Operations _____

12. Describe your business and the goods and/or services that you provide: _____

13. How long have you been operating this business? Years _____ Months _____

14. How long have you been at this location? Years _____ Months _____

15. Where were you previously located? _____ How long? _____

16. Do you have any additional locations for this business? Yes No

17. Do you have another or other business(s) located elsewhere? Yes No

17a. If so, where? _____

18. What are your normal business hours and days of operation (Check days, write in hours)

Day	Open	Close
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

19. How many employees do you have? Full Time _____ Part Time _____

Initials of Respondent: _____

Initials of Interviewer: _____

20. How do most of your customers get to your business (Fill in estimated %) Car _____% Bus _____%
 Walk _____% Other (specify) _____%

21. Where do most your customers come from (neighborhood, community, area)? _____

21a. What percentage of your business, if any, is from the internet? _____%

22. Additional comments: _____

Current Facility (Physical Features)

23. Site

23a. Total land area square footage _____ sf

23b. Parking square footage _____ sf or approximate number of parking spaces _____

24. Buildings/Outside Work Areas

24a. Sales _____ sf

24b. Office _____ sf

24c. Warehouse _____ sf

24d. Manufacturing _____ sf
 (workshop)

24d. Yard _____ sf

24e. Other (specify) _____ sf for _____

24f. **TOTAL** _____ sf

25. How many parking spaces does the business have? (write in number) _____

26. Does your business have special zoning requirements, e.g. a conditional use permit? Yes No

26a. Does you business have a valid liquor license? Yes No

26b. If yes to either a or b above, please explain: _____

Financial Information

27. Do you Lease or Own the land/building? (Check appropriate column)

	Own	Lease	No. Years	No. Months
Land				
Building (s)				

Initials of Respondent: _____

Initials of Interviewer: _____

28. Ownership

28a. Are you the sole owner of the property? Yes No

28b. Are there lien holder(s) on this property? Yes No

28c. If so, please identify lien holder(s):

Name of Lien Holder	Address	Phone No.

28d. Do you lease a portion of the property? Yes No

28e. If so, what are the names of the businesses and owners? (Write names of all businesses and owners):

Name of Business and Owners	Approx. Sq. Ft.	Lease Termination Date

29. Leasing (Tenants)

29a. If you lease the land, what is your current monthly lease payment \$ _____

29b. If you lease the building, what is your current monthly lease payment \$ _____

29c. Total monthly lease? \$ _____

29d. Do you have a Lease Agreement: Yes No Can you provide me a copy: Yes No

30. What type of lease do you have? Percentage Sales Triple Net Gross Lease

Other (specify): _____

30a. When does you lease end? (write in month/day/year) _____

30b. Do you have any option to extend the lease? Yes No

30c. Are there residents living on the premises? Yes No

30d. Do you sublease to others? Yes No

Initials of Respondent: _____

Initials of Interviewer: _____

30e. If you do sublease, what are the names of the businesses and owners? (Write names of all businesses and owners):

Name of Business and Owners	Approx. Sq. Ft.	Lease Termination Date

Equipment & Inventory

31. Do you know the replacement value of your personal property, which includes both inventory and equipment?

No Yes Value: \$ _____

32. Equipment - What equipment do you own and/or lease; are there liens on any of this equipment; what equipment do you intend to move? Use additional paper if necessary. **Ownership of equipment must be verified.**

ITEM (Movable Fixtures, Equipment, Inventory, Other Personal Property) <i>(First 2 lines are examples only, start with Item #1 on line 3 – Use additional pages as needed)</i> Page 1 of _____	Quantity	Item Verification (Check all that apply and are applicable)			Item Status (check one)		Move Intention (check one)	
		Own	Lease	Lien	Item Operable/ in use	Item Inoperable - retrieved from offsite storage	To be moved	Not to be moved
1. Self –contained 2 door cooler (51" x 30" x 79" – F & E list does not mention that THIS UNIT NEEDS A DRAIN	1		x	x	x		x	
2. Three drawer file cabinets – Mover's list only showed one	2	x			x		x	

This grid is continued on next page

Initials of Respondent: _____

Initials of Interviewer: _____

33. Do you have documentation showing you own the F & E and/or Trade Fixture? Yes No
 Copies available Not Available I will prepare copies by (date) _____

34. Did you install any of the fixtures that are attached to the building: Yes No

34a. If so, do you have documentation showing you paid for the work: Yes No

34b. Can you provide a replacement value (supporting by receipts) of the fixtures that are attached to the building? No Yes Value: \$ _____

34c. What fixtures that are attached to the building did you install? Are there liens on any of these fixtures? Which of these fixtures that can be detached and moved do you intend to move? *Use additional paper if necessary.* **Ownership of fixtures must be verified.**

ITEM Fixtures that are attached to the building <i>(First 2 lines are <u>examples only</u>, start with Item #1 on line 3 – Use additional pages as needed)</i>	Quantity	Item Verification (Check all that apply and are applicable)			Move Intention (if fixtures can be moved)	
		Own	Lien	Operable	Yes	No
1. Walk-in cooler – with floor (if it can be moved)	1		x	x	x	
2. Built – in hood over stove (if it can be moved)	2	x		x	x	

Page 1 of _____

Initials of Respondent: _____

Initials of Interviewer: _____

35. Inventory - What months of the year do you have the least inventory and the most inventory? (Check all that apply)

Month	Least Inventory	Most Inventory	Month	Least Inventory	Most Inventory
January			July		
February			August		
March			September		
April			October		
May			November		
June			December		

36. Hazardous Materials – Are you aware of any hazardous material such as dry cleaning fluids, coolants, motor oil, etc.? Yes No

36a. If you have hazardous material, how do you deal with the following?

Disposal: _____

Emissions: _____

Handling: _____

Storage: _____

Replacement Site Requirements _____

37. Do you plan to relocate and continue your business at a new site? Yes No

38. Do you plan to enter new market, i.e., expand your product line after the move? Yes No Undecided

39. Are you currently working with a real estate agent or attorney? Yes No

39a. If yes, what is the name of the agent/attorney; his/her phone number and the company for whom they work: _____

40. Have you identified and/or obtained a replacement site? Yes No

40a. If yes, please provide the owners name and address of site: _____

40b. If yes, what is the square footage? _____ sf.

41. Do you have a preferred area or site where you would like to relocate to? Yes No

41a. If yes, where is the area and/or site? _____

42. Do you have an alternate choice for a preferred area and/or site if your first is not available? Yes No

43. If you have an alternate site, why did you choose that site? _____

Initials of Respondent: _____

Initials of Interviewer: _____

44. Which of the following location/access requirements are important? (check all that apply) Near airport
Near public transportation Near railroad line Near major truck route Sidewalk access
High visibility site Other: _____

45. At the replacement site, how much square footage do you anticipate will be required for the various components of your business:

- 45a. Sales _____ sf
- 45b. Office _____ sf
- 45c. Warehouse _____ sf
- 45d. Manufacturing _____ sf
(workshop)
- 45d. Yard _____ sf
- 45e. Other (specify) _____ sf for _____
- 45f. **TOTAL** _____ sf

46. What type of shipping and receiving accommodation do you need? Docks RR Spur
Designated Load/Unload Other (specify) _____

47. Do you depend on trucks for your business? Yes No

- 47b. What is the size of your largest truck? Length _____ ft width _____ ft
- 47b. Do your trucks need special turn-around space? Yes No
- 47c. Do you need space for semi-trailer/trucks? Yes No
- 47d. Where do you need access: Front of business Rear of Business Both

Other (specify): _____

48. What are your current/expected future electrical power needs? (please be as specific as possible) _____

49. What are your current/expected future HVAC needs? (please be specific) _____

50. How much parking will you need? (please be specific) _____

51. What additional needs will your business require in the new location (e.g., utility needs, equipment, etc)?

Initials of Respondent: _____ Initials of Interviewer: _____

EXHIBIT D

Residential Interview Form



**Residential
Interview Form**

Project Name:	Bristol Street Widening Phase IV between Warner Ave. & Andrew Place
Property Owners:	
Parcel Number:	
Displacee:	
Case Number:	

Tenant **Owner/Occupant**
Inquilino Propietario-ocupante

Interviewer: _____ **Date of Interview:** _____

1. Name of (occupant) respondent: _____
1. Nombre del entrevistado:

2. Name of Head of Household (if not respondent): _____
2. Nombre del jefe de familia (si no es el entrevistado):

3. Street Address: _____ **Unit:** _____
3. Domicilio: Unidad:
City: _____ **Zip:** _____
Ciudad: Postal:

Names of **ALL** adults must be as they appear on I.D. that shows signature and will be used to cash benefit checks (Submit copies of I.D. ASAP)

4. Telephone Number(s) of Residence: () _____ **a. Cell#:** () _____
4. Numero(s) de teléfono de la residencia: a. Celular:
b. Work#: () _____ **c. Other#:**() _____
b. Trabajo c. Otro

5. Email: _____
5. Correo electronico

6. Name of Property owner (if not the same): _____
6. Nombre del propietario (si no es el mismo que el entrevistado)

7. Property owner's telephone: () _____
7. Teléfono del propietario

Household Composition

8. Number of family members occupying residence: _____ **a. # of adults:** _____ **b. #of children:** _____
8. Cantidad de miembros de familia que ocupan el hogar: a. #de adultos: b. #de menores:

9. Do other families or individuals occupy this residence: Yes No **a. If so, how many?:** _____
9. Hay otras familias o individuos que viven en el hogar?: a. Si lo hay, cuantos?

10. Number of members of second family: _____ **a. Name of head of second family:** _____
10. Cantidad de miembros en la segunda familia. a. Nombre del jefe de la segunda familia:

11. Number of members of third family: _____ **a. Name of third family:** _____
11. Cantidad de miembros en la tercera familia: a. Nombre del jefe de la tercera familia:

12. Total number of people living in residence: _____
12. Cantidad total de personas viviendo en el hogar:

Initials of Respondent (iniciales del entrevistado): _____

Initials of Interviewer: _____

Household Composition (cont'd)

13. Primary nationality: Caucasian Hispanic African-American Chinese Korean
13. Nacionalidad Japanese American Indian Other: _____

14. Primary language spoken: _____ a. Will an interpreter be needed: Yes No
14. Idioma principal: a. Sera necesario obtener un interprete?

15. Does someone in the household understand and speak English?: Yes No a. Name: _____
15. Alguna persona en el hogar entiende y habla ingles? a. Nombre de la persona que habla ingles:

16. Are there individuals with disabilities living in the household(s): Yes No
16. Hay miembro(s) del hogar que tienen discapacidades fisicas?

a. Please describe disability: _____
a. Por favor describa la discapacidades fisicas?

b. Is this a work-related disability (did it happen on your job): Yes No
b. Esta discapacidad ocurrió o está relacionada con su trabajo?

17. Types and number of pets in household: _____
17. Cantidad y tipo de mascotas que se encuentran en el hogar:

Length of Occupancy

18. Is this your primary residence? Yes No
18. Es esta su vivienda principal?

19. How long have you lived at this address? Years _____ Months _____ a. Date of original occupancy: _____
19. Cuanto tiempo ha vivido en esta dirección? Años Meses a. Fecha en que ocupo la vivienda:

20. How long have you live in the area? Years _____ Months _____
20. Cuanto tiempo ha vivido en esta área ? Años Meses

Property Description

21. What type of dwelling do you occupy: Single family residence Condominium Duplex Mobile home
21. Que tipo de vivienda ocupa:
3-4 unit apartment 5+ unit apartment Rooming house Hotel/motel Other _____

22. Dwelling rooms/ facilities (number):
22. Habitaciones/instalaciones básicas (cantidad):

Bedrooms <input type="checkbox"/> <i>Habitaciones</i>	Living Room <input type="checkbox"/> <i>Comedor</i>	Family Room <input type="checkbox"/> <i>Cuarto Familiar</i>	Utility Room <input type="checkbox"/> <i>Cuarto de utilidades</i>
Bath* <input type="checkbox"/> <i>Baño</i>	Dining Room <input type="checkbox"/> <i>Sala</i>	Den <input type="checkbox"/> <i>Ante Sala</i>	Storage <input type="checkbox"/> <i>Almacén</i>
Kitchen <input type="checkbox"/> <i>Cocina</i>	Garage <input type="checkbox"/> <i>Garaje</i>	Parking <input type="checkbox"/> <i>Estacionamiento</i>	Other <input type="checkbox"/> <i>Otro</i>

Additional Comments: _____

Total Number of Rooms
Cantidad total de cuartos

***Interview instructions: Explain that Bathrooms are NOT considered [part of the room count] for purposes of calculating moving payments.**

Initials of Respondent (iniciales del entrevistado): _____

Initials of Interviewer: _____

Property Description (cont'd)

23. Appliances/ other items in dwelling (list items by ownership):

23. Aparatos electrodomésticos u otros aparatos en la vivienda (ponerlos en orden de posesión):

Tenant: _____
Inquilino:

Owner: _____
Propietario:

24. How many separate structures are on the property that people are living in? _____

24. Cuantas estructuras separadas tiene la propiedad y que están siendo habitadas?

Renters Information

Interview instructions: If displacee is also the property manager, please ask questions 49-52 on page 6

25. Do you have a lease? Yes No a. When does the lease end? _____

25. Tiene un contrato de renta?

a. Cuando se finaliza el contrato?

b. Whose name is on the lease? _____

b. A nombre de quien esta el contrato de renta?

26. Name of the individual primarily responsible for paying the rent: _____

26. Nombre de la persona que se encarga de pagar la renta?

27. Name of other individuals, family members, or heads of household who contribute to the rent:

27. Nombre de miembros de familia, jefe de familia u otras persona que contribuyen al pago de la renta:

28. Monthly Rent: \$ _____

28. Mensualidad

29. What utilities are included in your rent: Gas Electricity Water

29. Que utilidades estan incluidas en la renta?

a. Deposit amount: \$ _____

a. Cantidad de depósito

a. What do you pay for utilities that are not included in your rent: \$ _____

a. Cuanto pago por las utilidades que no estan incluidas en su renta?

30. Does anyone in the household receive a rent subsidy: Yes No

30. Alguna persona en el hogar recibe asistencia para la vivienda?

a. What type of rent subsidy? Section 8 voucher Other: _____

a. Qué clase de asistencia para la vivienda recibe?

Sección 8 u otra?

b. Are you, or anyone in your household related to the owner of the property or property manager? Yes No

b. Usted o alguien en su familia esta relacionado con el dueño de la propiedad o el manejador?

If so, what is the relationship?: _____

Si es así, cual es su relación?

Owner/Occupant Information

31. Is there a mortgage on the home?: Yes No a. If so, how much is the monthly payment: \$ _____

31. Tiene usted una hipoteca o préstamo sobre su hogar?

a. Cuanto es la mensualidad de su hipoteca o préstamo?

b. Mortgage origination date: _____

b. Fecha en que se origino su hipoteca o préstamo?

c. Current balance: \$ _____

c. Balance o cantidad que debe:

d. Interest rate: _____ %

d. Taza de interés:

e. Type of loan: Fixed Variable VA/VET FHA Other: _____ f. # of payments left: _____

e. Tipo de préstamo: Fijo Variable

Otro

f. Cantidad de pagos restantes

Initials of Respondent (iniciales del entrevistado): _____

Initials of Interviewer: _____

Owner/Occupant Information (cont'd)

32. Do you rent a portion of the property to anyone else? Yes No

32. Renta una porción de la propiedad a alguna otra persona?

a. For a: **Business** **Storage** **Residence**
a. Para: *Negocio* *Almacenamiento* *Hospedaje*

b. Are any of these tenants related to you or any member of your immediate household? Yes No

b. Algunos de estos inquilinos esta relacionados con usted o algún miembro inmediatos de su familia?

If so, what is the relationship? _____
Si es así, cual es la relación?

c. If the answer to 32 is yes, what structure do they share or occupy? Main house or Bldg. Garage Trailer
c. Si ha respondido "si" en la #32, que estructura ocupan o comparten? La casa principal o edificio El garaje Casa móvil

Other: _____
Otro

d. If you live in a single family house or other unit on this property, do you rent any portion of that house or that unit to tenants? Yes No

d. Si usted vive en una casa o alguna otra unidad en esta propiedad, la renta alguna porción de esa casa o esa unidad a inquilinos?

e. If the answer to 32d is yes, please fill in the table below.

e. Si la respuesta a la pregunta 32d es si, favor de llenar la table siguiente.

Use this section for tenants occupying the <u>same single family house</u> or unit that the owner owns <u>and occupies</u> .						
Tenant Names (Check box if tenant is related to you)	First date of Occupancy	Rental Rate (monthly)	Utilities paid by		Furniture owned by	
			Owner	Tenant	Owner	Tenant
1. <input type="checkbox"/>						
2. <input type="checkbox"/>						
3. <input type="checkbox"/>						

Do you have leases with any of the tenants? Yes No
 (Agent: If so, explain that we will need copies of these leases)

Business Use in Residence

33. Do you run a business out of your home? Yes No

33. Tiene usted un negocio que opera dentro de la casa?

a. Is there a room [or garage] specifically set aside for ONLY this business? Yes No

a. Hay una habitación designada específicamente para este negocio?

Interviewer instructions: If the displacee plans to keep the "business" in their residence when they move into their replacement property, the Agency will pay the additional costs associated with moving that equipment. But it will be treated as a residential case with added moving and possible "set-up" costs. In situations where it is a more complicated business [ex. a built-out recording studio] and/or the displacee wishes to move it elsewhere, it can be considered as a separated business relocation. In these situations, the displacee needs to understand the concept of a "carve-out", which might reduce their residential PPD or RAP payment. After this is explained, ask question b. below.

b. If so, do you plan to keep this business in your replacement residence? Yes No

b. Si es así, usted planea continuar su negocio en su vivienda de remplazo?

Initials of Respondent (iniciales del entrevistado): _____

Initials of Interviewer: _____

Income Information

34. Primary and secondary sources of household income: Employment (full time) (part time)

34. Fuente de ingresos primarios y secundarios:

Empleo (tiempo completo)

(media tiempo)

Retirement pension Social Security Public assistance (welfare) Unemployment Food stamps
Pension de retiro Segura Social Asistencia pública Desempleo Estampillas de comida

SSI Workers Comp. Child support Other family subsidy (including alimony)
Segura Social Suplemental Compensación del trabajador Sostenimiento al niño Otros subsidio familiar (incluyendo asistencia de divorcio)

Other: _____
Otro:

35. Combined monthly income of household BEFORE taxes: Under \$500 \$500-\$999 \$1,000-\$1,499

35. Ingresos combinados mensuales ANTES de impuestos:

\$1,500-\$1,999 \$2,000-\$2,499 \$2,500-\$2,999 \$3,000-\$3,499 \$3,500-\$3,999 \$4,000+

36. Do you get rental income from this property? Yes No

36. Obtiene usted algun ingreso de renta de su propiedad/vivienda?

Transportation & Education

37. Distance to household member's place of work: Head of household: (___Miles) (___ Minutes)

37. Distancia de su hogar a su lugar de trabajo:

Jefe de familia

millas

minutos

Other member of household:

Otros miembros de su hogar:

_____ (___Miles) (___ Minutes)

_____ (___Miles) (___ Minutes)

_____ (___Miles) (___ Minutes)

38. The three principal means of transportation used by your household members, indicate order most used (1,2, etc.)

38. Los tres medios de transporte principal usado por los miembros de familia, indique el orden de uso más frecuente. 1 siendo el más usado.

Bicycle ___ Bus ___ Car ___ Metro ___ Ride with others ___ Walk ___ (# of cars in household) ___
Bicicleta Autobús Carro Paseo con otros Caminar Cantidad de autos en la familia

39. K-12 Schools attended: _____

39. Escuela de kinder a secundaria que atiende:

40. Primary transportation to and from school(s): Bicycle Bus Car Metro Ride with others Walk

40. Transporte principal que usa hacia y de regreso de su escuela(s):

41. College attended: _____

41. Universidad o colegios que atiende:

42. Primary transportation to and from college: Bicycle Bus Car Metro Ride with others Walk

42. Transporte principal que usa hacia y de regreso de la Universidad o colegio:

Initials of Respondent (iniciales del entrevistado): _____

Initials of Interviewer: _____

Replacement Housing Preferences

43. If you choose to stay in this neighborhood is it because:

43. Si desea quedarse dentro de su misma área o vecindario indiquenos porque?

(Indicate preference: 1,2,3, etc. - number 1 being the most important)

(Indique la importancia de la razón, 1 siendo el más importante)

My job is nearby: _____ Convenient to shopping: _____ Close to schools: _____ Close to church: _____
Mi trabajo esta cercano: Conveniencia de tiendas: Cerca de escuelas: Cerca de la iglesia:

My friends and relatives are nearby: _____ Public transportation availability: _____ Other: _____
Cerca de mis familiares o amigos: Disponibilidad de transportación publica: Otros:

44. If not this neighborhood, what other areas or cities would you prefer? Please list in order of preference.

44. Si no en esta área o vecindario, en que otras ciudades preferiría vivir? Por favor indique en orden de preferencia.

1) _____ 2) _____ 3) _____

45. Would you prefer to: Rent Buy
45. Prefiere usted: Rentar Comprar

46. Are you aware of the programs available to assist first time buyers with the purchase of a home? Yes No
46. Esta usted enterado de los programas disponibles para asistir a las personas que compran casa por primera vez?

47. What type of property would you like to move into? House Apartment Duplex Mobile home
47. A que tipo de propiedad prefiere moverse?
Rooming house Condominium Other

48. Would the entire household move together as the unit is now comprised? Yes No
48. Se moverían los integrantes de la vivienda en la misma manera en que están compuestos?

If no, please explain: _____
Explique porque no:

Question for Tenants who are Employed as Resident-Managers on the Displacement Property

49. My responsibilities as manager include: Collecting rent Maintenance Security
49. Mis responsabilidades como manejador incluyen: Colección de rentas Mantenimiento Seguridad

50. My job managing this property is a full-time job, or my only job?..... Yes No
50. Mi posición como manejador de la propiedad es un trabajo completo, o mi único trabajo?

51. I have a written agreement or lease with the owner/management co. with regard to these duties. Yes No
51. Yo tengo un contrato por escrito con el dueño manejador relacionado con la compensación por mis obligaciones.

52. How are you compensated for your work as the property manager for this property? (check all that apply)
52. Como es compensado por su trabajo de manejador de esta propiedad?

I am paid a salary of \$ _____ /month
Mi pago es un salario de \$ _____ al mes

I receive a reduction in the monthly rental of my unit; my rent is \$ _____ /month
Yo recibo una reducción en mi renta mensual de mi unidad; mi renta es \$ _____ al mes

Initials of Respondent (iniciales del entrevistado): _____

Initials of Interviewer: _____

Household Occupants

53. Occupant Grid:

Note: Names for ALL adults **MUST** be as they appear on I.D. that shows signature and will be used to cash benefit checks. *(Submit copies of I.D. as soon as possible)*

NAME Nombre		RELATIONSHIP (to head of household) Parentesco									EMPLOYMENT Empleo					STUDENT Estudiante						
Begin with Heads of Household (HOH)- circle groups of numbers to indicate separate families: 4 John Smith 5 Ana Smith 6 Alex Smith 7 Bob Gates 8 Kim Gates		Husband	Wife	Son	Daughter	Sister/Brother	Niece/Nephew	Father/Mother	Other	Age (edad)	Sex (sexo)	Disabled	Full Time (35+ hrs)	Part Time	More than one job	Unemployed	Retired	Pre-School	K-8 Grade	9-12 Grade	Part Time College	Full Time College
HOH		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2																						
3																						
4																						
5																						
6																						
7																						
8																						
9																						
10																						
11																						
12																						
13																						
14																						
15																						

Initials of Respondent (iniciales del entrevistado): _____

Initials of Interviewer: _____

Additional Comments

54. Is there anything that you would like to tell us about the property or the occupants?

54. Hay algo más que le gustaría decirnos sobre la propiedad o los ocupantes?

All of the above information I have given is true and accurate to the best of my knowledge:

Toda la información proveído es verdadera y exacta de acuerdo a mi mejor conocimiento:

Name of Respondent (print name)

Nombre del Entrevistado (letra de molde)

Signature of Respondent

Firma del Entrevistado

Date

Fecha

Name of Respondent (print name)

Nombre del Entrevistado (letra de molde)

Signature of Respondent

Firma del Entrevistado

Date

Fecha

Interviewee has cooperated in the interview, but refused to sign above

Interviewee refused to be interviewed

Information submitted has been provided by others: Neighbors Other relatives Relocation Agent

Interviewer/Relocation Consulting Agent (please print then sign)

Date

Epic land Solutions, Inc.
Relocation Consulting Firm

ADDITIONAL PAGES ATTACHED Yes No

EXHIBIT E

Non- Residential Brochure

Your Rights and Benefits as a Displaced Business, Farm, or Nonprofit Organization



Introduction

In building a modern transportation system, the displacement of a small percentage of the population is often necessary. However, it is the policy of the City that displaced persons shall not suffer unnecessarily as a result of programs designed to benefit the public as a whole.



Displaced individuals, families, businesses, farms, and nonprofit organizations may be eligible for relocation advisory services and payments.

This brochure provides information about available relocation services and payments. If you are required to move as the result of the City's project, a Relocation Agent will contact you. The Relocation Agent will be able to answer your specific questions and provide additional information.

Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 as Amended "The Uniform Act"



The purpose of this Act is to provide for uniform and equitable treatment of persons displaced from their business, farm or non-profit organization, by federal and federally assisted programs and to establish uniform and equitable land acquisition policies for federal and federally assisted programs.

49 Code of Federal Regulations Part 24 implements the "Uniform Act" in accordance with the following relocation assistance objective:

To ensure that persons displaced as a direct result of federal or federally-assisted projects are treated fairly, consistently and equitably so that such persons will not suffer disproportionate injuries as a result of projects designed for the benefit of the public as a whole.

While every effort has been made to assure the accuracy of this booklet, it should be understood that it does not have the force and effect of law, rule, or regulation governing the payment of benefits. Should any difference or error occur, the law will take precedence.

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

It describes the relocation payments and other relocation assistance provided under the Uniform Act to displaced businesses, nonprofit organizations and farms. This includes any such occupant that moves from real property, or moves personal property from real property, as a direct result of rehabilitation, demolition or acquisition for a public project. If you are notified that you will be displaced, it is important that you **do not move** before you learn what you must do to receive the relocation payments and other assistance to which you are entitled.

This brochure provides information about available relocation services and payments. If you are required to move as the result of the City's project, a Relocation Agent will contact you. The Relocation Agent will be able to answer your specific questions and provide additional information.

This booklet may not answer all of your questions. If you have more questions about your relocation, contact the City's representative responsible for the project. Ask your questions before you move. Afterwards, it may be too late.

Relocation Services

The City has two programs to aid businesses, farms and nonprofit organizations which must relocate.

These are:

1. The Relocation Advisory Assistance Program, which is to aid you in locating a suitable replacement property, and
2. The Relocation Payments Program, which is to reimburse you for certain costs involved in relocating. These payments are classified as:
 - Moving and Related Expenses (costs to move personal property not acquired).
 - Reestablishment Expenses (expenses related to the replacement property).
 - In-Lieu Payment (a fixed payment in lieu of moving and related expenses, and reestablishment expenses).

Note: Payment for loss of goodwill is considered an acquisition cost. California law and the federal regulations mandate that relocation payments cannot duplicate other payments such as goodwill.

You will **not** be eligible to receive any relocation payments until the City has actually made the first written offer to purchase the

property. You will also receive at least 90 days' written notice before you must move.

Some Important Definitions...

Your relocation benefits can be better understood if you become familiar with the following terms:

Business: Any lawful activity, with the exception of a farm operation, conducted primarily for the purchase, sale, lease and rental of personal or real property, or for the manufacture, processing, and/or marketing of products, commodities, or any other personal property, or for the sale of services to the public, or solely for the purpose of this Act, and outdoor advertising display or displays, when the display(s) must be moved as a result of the project.

Small Business: A business having not more than 500 employees working at the site being acquired or displaced by a program or project.

Contributes Materially: A business or farm operation must have had average annual gross receipts of at least \$5,000 or average annual net earnings of at least \$1,000 during the two taxable years prior to displacement, or the business contributed at least 33 1/3 percent of the owner(s)' gross income in each of the two taxable years prior to displacement.

Displaced Person or Displacee: Any person who moves from real property or moves personal property from real property as a result of the acquisition of the real property, in whole or in part, or as the result of a written notice from the City to vacate the real property needed for the project. In the case of a partial acquisition, the City shall determine if a person is displaced as a direct result of the acquisition.

Residents not lawfully present in the United States are not eligible to receive relocation payments and assistance.

Farm Operation: Any activity conducted solely or primarily for the production of one or more agricultural products or commodities, including timber, for sale and home use, and customarily producing such products or commodities in sufficient quantity to be capable of contributing materially to the operator's support.

Nonprofit Organization: A public or private entity that has established its nonprofit status under applicable law.

MOVING EXPENSES



If you qualify as a displaced business, farm or nonprofit organization, you are entitled to reimbursement of your moving costs and certain related expenses incurred in moving. To qualify you must legally occupy the property as the owner or lessee/tenant when the City initiates negotiations for the acquisition of the property OR at the time the City acquires title or takes possession of the property. However, to assure your eligibility and prompt payment of moving expenses, you should contact your Relocation Agent before you move.

You Can Choose Either:

Actual Reasonable Moving Costs - You may be paid for your actual reasonable moving costs and related expenses when a commercial mover performs the move. Reimbursement will be limited to a move of 50 miles or less. Related expenses, with limitations, may include:

- Transportation.
- Packing and unpacking personal property.
- Disconnecting and reconnecting personal property related to the operation.
- Temporary storage of personal property.
- Insurance while property is in storage or transit, or the loss and damage of personal property if insurance is not reasonably available.
- Expenses in finding a replacement location (\$2,500 limit).

- Professional services to plan and monitor the move of the personal property to the new location.
- Licenses, permits and fees required at the replacement location.

OR

Self-Move Agreement - You may be paid to move your own personal property based on the lower of two acceptable bids obtained by the City.

Under this option, you will still be eligible for reimbursement of related expenses listed above that were not included in the bids.

OR

In-Lieu Payment – A small business may be eligible to accept a fixed payment between \$1,000 and \$40,000, based on your annual earnings IN LIEU OF the moving cost and related expenses. Consult your Relocation Agent for more information about this option.

Actual Reasonable Moving Costs

You may be paid the actual reasonable and necessary costs of your move when a professional mover performs the move. All of your moving costs must be supported by paid receipts or other evidence of expenses incurred. In addition to the transportation costs of your personal property, certain other expenses may also be reimbursable, such as packing, crating, unpacking and uncrating, and the disconnecting, dismantling, removing, reassembling, and

reinstalling relocated machinery, equipment, and other personal property.

Other expenses such as professional services necessary for planning and carrying out the move, temporary storage costs, and the cost of licenses, permits and certifications may also be reimbursable. This is not intended to be an all-inclusive list of moving related expenses. Your Relocation Agent can provide you with a complete explanation of reimbursable expenses.

Self-Move Agreement

If you agree to take full responsibility for all or part of the move of your business, farm, or nonprofit organization, the City may approve a payment not to exceed the lower of two acceptable bids obtained by the City from qualified moving firms. A low-cost or uncomplicated move may be based on a single bid or estimate at the City's discretion. The advantage of this moving option is the fact that it relieves the displaced business, farm, or nonprofit organization operator from documenting all moving expenses. The City may make the payment without additional documentation as long as the payment is limited to the amount of the lowest acceptable bid or estimate. Other expenses, such as professional services for planning, storage costs, and the cost of licenses, permits, and certifications may also be reimbursable if determined to be necessary. These latter expenses must be pre-approved by the Relocation Agent.

Requirements:

Before you move, you must provide the City with the:

- Certified inventory of all personal property to be moved.
- Date you intend to vacate the property.
- Address of the replacement property.
- Opportunity to monitor and inspect the move from the acquired property to the replacement property.

Related Expenses

1. **Searching Expenses for Replacement Property:** Displaced businesses, farms, and nonprofit organizations are entitled to reimbursement for actual reasonable expenses incurred in searching for a replacement property, not to exceed \$2,500. Expenses may include transportation, meals, and lodging when away from home; the reasonable value of the time spent during the search; fees paid to the real estate agents, brokers or consultants; and other expenses determined to be reasonable and necessary by the City.



2. **Direct Loss of Tangible Personal Property:** Displaced businesses, farms, and nonprofit organizations may be eligible for a payment for the actual direct loss of tangible personal property which is incurred as a result of the move or

discontinuance of the operation. This payment will be based upon the lesser of:

a) The fair market value of the item for continued use at the displacement site minus the proceeds from its sale.

OR

b) The estimated cost of moving and reinstalling the replaced item, based on the lowest acceptable bid or estimate obtained by the City for eligible moving and related expenses, including dismantling and reassembly, but with no allowance for storage, cost of code requirement betterments or upgrades at the replacement site.

EXAMPLE:

You determine that the "document shredder" cannot be moved to the new location because of its condition, and you will not replace it at the new location.

Fair Market Value of the Document Shredder based on its use at the current location	\$1,500
Proceeds: Price received from selling the Document Shredder	-
Net Value	<u>\$ 500</u> \$1,000

OR

Estimated cost to move	\$1,050
Based on the "lessor of", the amount of the "Loss of Tangible Personal Property" =	\$1,000

Note: You are also entitled to all reasonable costs incurred in attempting to sell the document shredder (e.g. advertisement).

3. Purchase of Substitute Personal Property: If an item of personal property, which is used as part of the business, farm, or nonprofit organization, is not moved but is promptly replaced with a substitute item that performs a comparable function at the replacement site, the displacee is entitled to payment of the lesser of:

a) The cost of the substitute item, including installation costs at the replacement site, minus any proceeds from the sale or trade-in of the replaced item;

OR

b) The estimated cost of moving and reinstalling the replaced item, based on the lowest acceptable bid or estimate obtained by the City for eligible moving and related expenses, including dismantling and reassembly, but with no allowance for storage, cost of code requirement betterments or upgrades at the replacement site.

EXAMPLE A:

You determine that the copying machine cannot be moved to the new location because it is now obsolete and you will replace it.

Cost of a substitute <i>Copying Machine</i> including installation costs at the replacement site.		\$3,000
Trade-in Allowance	-	<u>\$2,500</u>
Net Value		\$ 500

OR

Estimate cost to move		\$ 550
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Based on the "lesser of", the amount of the "Substitute Personal Property" = **\$ 500**

EXAMPLE B:

You determine that the chairs will not be used at the new location because they no longer match the décor and you will replace them.

Cost of substitute chairs		\$1,000
Proceeds: From selling the Chairs	-	<u>\$ 100</u>
Net Value		\$ 900

OR

Estimated cost to move		\$ 200
------------------------	--	--------

Based on the "lesser of", the amount of the "Substitute Personal Property" = **\$ 200**

Note: You are also entitled to all reasonable costs incurred in attempting to sell the document shredder (e.g. advertisement).

4. **Disconnecting and Reinstallation:** You will be reimbursed for your actual and reasonable costs to disconnect, dismantle, remove, reassemble and reinstall any machinery, equipment or other personal property in relation to its move to the new location. This includes connection to utilities available nearby and any modifications to the personalty that is necessary to adapt it to utilities at the replacement site.

5. **Physical changes at the new location:** You may be reimbursed for certain physical changes to the replacement property if the changes are necessary to permit the reinstallation of machinery or equipment necessary for the continued operation of the business. **Note:** *The changes cannot increase the value of the building for general purposes, nor can they increase the mechanical capability of the buildings beyond its normal requirements.*

6. The cost of installing utilities from the right of way line to the structure(s) or improvements on the replacement site.

7. Marketing studies, feasibility surveys and soil testing.

8. One-time assessments or impact fees for anticipated heavy utility usage.

Reestablishment Expenses

A small business, farm or nonprofit organization may be eligible for a payment, not to exceed \$25,000, for expenses actually incurred in relocating and reestablishing the enterprise at a replacement site.

Reestablishment expenses may include, but are not limited to, the following:

1. Repairs or improvements to the replacement real property required by Federal, State or local laws, codes or ordinances.
2. Modifications to the replacement of real property to make the structure(s) suitable for the business operation.
3. Construction and installation of exterior signing to advertise the business.
4. Redecoration or replacement such as painting, wallpapering, paneling or carpeting when required by the condition of the replacement site or for aesthetic purposes.
5. Advertising the new business location.
6. The estimated increased costs of operation at the replacement site during the first two years, for items such as:
 - a) Lease or rental charges
 - b) Personal or real property taxes
 - c) Insurance premiums, and
 - d) Utility charges (excluding impact fees).

7. Other items that the City considers essential for the reestablishment of the business or farm.

In-Lieu Payment (Fixed)

Displaced businesses, farms, and nonprofit organizations may be eligible for a fixed payment in lieu of (in place of) actual moving expenses, personal property losses, searching expense, and reestablishment expenses. The fixed payment may not be less than \$1,000 or more than \$40,000.

For a business to be eligible for a fixed payment, the City must determine the following:

1. The business owns or rents personal property that must be moved due to the displacement.
2. The business cannot be relocated without a substantial loss of existing patronage.
3. The business is not part of a commercial enterprise having more than three other businesses engaged in the same or similar activity, which are under the same ownership and are not being displaced by the City.
4. The business contributed materially to the income of the displaced business operator during the two taxable years prior to displacement.

Any business operation that is engaged solely in the rental of space to others is not eligible for a fixed payment. This includes the rental of space for residential or business purposes.

Eligibility requirements for farms and nonprofit organizations are slightly different than business requirements. If you are being displaced from a farm or you represent a nonprofit organization and are interested in a fixed payment, please consult your relocation counselor for additional information.

Note: A nonprofit organization must substantiate that it cannot be relocated without a substantial loss of existing patronage (membership or clientele). The payment is based on the average of two years annual gross revenues less administrative expenses.

The Computation of Your In-Lieu Payment:

The fixed payment for a displaced business or farm is based upon the average annual net earnings of the operation for the two taxable years immediately preceding the taxable year in which it was displaced. The City can use a different two year period if it is determined that the last two taxable years do not accurately reflect the earnings of the operation.

EXAMPLE: The City acquires your property and you move in 2015:

2013 Annual Net Earnings	\$ 10,500
2014 Annual Net Earnings	<u>\$ 12,500</u>
TOTAL	\$ 23,000
Average over two years	\$ 11,500

This would be the amount of your in-lieu payment. Remember - this is in-lieu of all other moving benefits. You must provide the City with proof of net earnings to support your claim.

Proof of net earnings can be documented by income tax returns, certified financial statements, or other reasonable evidence of net earnings acceptable to the City.

Note: The computation for nonprofit organizations differs in that the payment is computed on the basis of average annual gross revenues less administrative expenses for the two-year period specified above.

Before You Move:

- A. Complete a "Request for Determination of Entitlement" form available from your Relocation Agent, and return it promptly.
- B. Include a written statement of the reasons the business cannot be relocated without a substantial loss in net earnings.
- C. Provide certified copies of tax returns for the two tax years immediately preceding the tax year in which you move. (If you move anytime in the year 2015, regardless of when negotiations began or the City took title to the property, the taxable years would be 2013 and 2014).
- D. You will be notified of the amount you are entitled to after the application is received and approved.

E. You cannot receive the payment until after you vacate the property, AND submit a claim for the payment within 18 months of the date of your move.

Relocation Advisory Assistance



Any business, farm or non-profit organization, displaced by the City shall be offered relocation advisory assistance for the purpose of locating a replacement property. Relocation services are provided by qualified personnel employed by the City. It is their goal and desire to be of service to you and assist in any way possible to help you successfully relocate.

A Relocation Agent from the City will contact you personally. Relocation services and payments will be explained to you in accordance with your eligibility. During the initial interview with you, your needs and desires will be determined as well as your need for assistance.

You can expect to receive the following services, advice and assistance from your Relocation Agent who will:

- Determine your needs and preferences.
- Explain the relocation benefits and eligibility.
- Provide information on replacement properties for your consideration.
- Provide information on counseling you can obtain to help minimize hardships in adjusting to your new location.
- Assist you in completing loan documents, rental applications or Relocation Claims Forms.

AND provide information on:

- Security deposits.
- Interest rates and terms.
- Typical down payments.
- Permits, fees and local planning ordinances.
- SBA loan requirements.
- Real property taxes.
- Consumer education literature.

If you desire, your Relocation Agent will give you current listings of other available replacement property. Transportation will be provided to inspect available property, especially if you are elderly or handicapped. Though you may use the services of a real estate broker, the City cannot provide a referral.

Your Relocation Agent is familiar with the services provided by others in your community and will provide information on other federal, state, and local programs offering assistance to displaced persons. If you have special needs, your Relocation Agent will make every effort to secure the services of those agencies with trained personnel who have the expertise to help you.

If the project will require a considerable number of people to be relocated, the City will establish a temporary Relocation Field Office on or near the project. Project relocation offices will be open during convenient hours and evening hours if necessary.

In addition to these services, the City is required to coordinate its relocation activities with other agencies causing displacements to ensure that all persons displaced receive fair and consistent relocation benefits.

Remember - YOUR RELOCATION AGENT is there to offer advice and assistance. Do not hesitate to ask questions. And be sure you fully understand all of your rights and available benefits.

YOUR RIGHTS AS A DISPLACED

It is important to remember that your relocation benefits will not have an adverse effect on your:

- Social Security Eligibility
- Welfare Eligibility
- Income Taxes

In addition, the Title VIII of the Civil Rights Act of 1968 and later acts and amendments make discriminatory practices in the purchase and rental of most residential units illegal if based on race, color, religion, sex, or national origin.

The City's Non-Discrimination Policy ensures that all services and/or benefits will be administered to the general public without regard to race, color, national origin, or sex in compliance with Title VI of the 1964 Civil Rights Act (42 USC 2000d. et seq.).

And you always have the Right to Appeal any decision by the City regarding your relocation benefits and eligibility.

Your Right of Appeal is guaranteed in the "Uniform Act" which states that any person may file an appeal with the head of the responsible agency if that person believes that the agency has failed to properly determine the person's eligibility or the amount of a payment.

If you indicate your dissatisfaction, either verbally or in writing, the City will assist you in filing an appeal and explain the procedures to be followed. You will be given a prompt and full opportunity to be heard. You have the right to be represented by legal counsel or other representative in connection with the appeal (but solely at your own expense).

The City will consider all pertinent justifications and materials submitted by you and other available information needed to ensure a fair review. The City will provide you with a written determination resulting from the appeal with an explanation of the basis for the decision. If you are still dissatisfied with the relief granted, the City will advise you that you may seek judicial review.

General Questions

How Will I Know That I Am Eligible For Relocation Assistance?

You should receive a written notice explaining your eligibility for relocation assistance. You should not move before receiving that notice. If you do, you may not be eligible for relocation assistance.

How Will The City Know How Much Help I Need?

You will be contacted at an early date and personally interviewed by a representative of the City to determine your relocation needs and preferences for a replacement location and other services. The interviewer will ask about such matters as your space requirements. It is to your advantage to provide the information so that the City

can assist you in moving with a minimum of hardship. The information you give will be kept in confidence.

How Soon Will I Have To Move?

Every reasonable effort will be made to provide you with sufficient time to find and reestablish your business in a suitable replacement location. If possible, a mutually agreeable date for the move will be worked out. You will be given enough time to make plans for moving. Unless there is a court stipulated vacancy date, health or safety emergency, you will not be required to move without at least 90 days advance written notice. It is important, however, that you keep in close contact with the City's relocation representative so that you are aware of the time schedule for carrying out the project and the approximate date by which you will have to move.

How Will I Find A Replacement Location?

The City's representative will provide you with current information on available replacement locations that meet your needs. The City's representative may also provide you with the names of real estate agents and brokers who can assist you in finding the type of replacement location you need.

While the City's representative will assist you in obtaining information on a suitable replacement location, you should take an active role in finding and relocating to a location of your choice. No one knows your needs better than you. You will want a facility that provides sufficient space for your planned activities. You will also want to assure that there are no zoning or other requirements

which will unduly restrict your planned operations. The City's representative will explain the kinds of moving and reestablishment costs that are eligible for repayment and which are not eligible. That will enable you to carry out your move in the most advantageous manner.

I Have A Replacement Location And Want To Move. What Should I Do?

Before you make any arrangements to move, notify the City's representative, in writing, of your intention to move. This should be done at least 30 days before the date you begin your move. The City's representative will discuss the move with you and advise you of the relocation payment(s) for which you may be eligible, the requirements to be met, and how to obtain a payment.

I Plan To Discontinue My Business Rather Than Move. What Should I Do?

If you have decided to discontinue your business rather than reestablish, you may still be eligible to receive a payment. Contact the City's representative and discuss your decision to discontinue your business. You will be informed of the payment, if any, for which you may be eligible and the requirements that must be met to obtain the payment.

I Own This Property. Will I Be Paid For It Before I Have To Move?

If you reach a negotiated agreement to sell your property to the City, you will not be required to move before you receive the

agreed purchase price. If the property is acquired through an eminent domain proceeding, you cannot be required to move before the estimated fair market value of the property has been deposited with the court. (You should be able to withdraw this amount immediately, less any amounts necessary to pay off any mortgage or other liens on the property and to resolve any special ownership problems. Withdrawal of your share of the money will not affect your right to seek additional compensation for your property.)

Do I Have To Pay Federal Income Taxes On My Relocation Payments?

No. Section 216 of the URA states that you need not report relocation payments as part of your gross income for Federal tax purposes. For information on State or local income taxes, you should check with the State or local income tax office in your area or with your personal tax advisor.

I Have More Questions. Who Will Answer Them?

If you have further questions after reading this booklet, contact the City's representative and discuss your concerns with the City's representative.

Received By: _____
(signature)

Date: _____

land solutions for the public good




Epic Land Solutions, Inc. 

Non-Residential Relocation Brochure
UNIFORM ACT
Effective Sept. 04, 2015

EXHIBIT F

Residential Brochure



RESIDENTIAL Relocation Assistance Program



Introduction

In building a modern transportation system, the displacement of a small percentage of the population is often necessary. However, it is the policy of the City that displaced persons shall not suffer unnecessarily as a result of programs designed to benefit the public as a whole.

Displaced individuals, families, businesses, farms, and nonprofit organizations may be eligible for relocation advisory services and payments.

This brochure provides information about available relocation services and payments. If you are required to move as the result of the City's project, a Relocation Agent will contact you. The Relocation Agent will be able to answer your specific questions and provide additional information.

Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 As Amended "The Uniform Act"

The purpose of this Act is to provide for uniform and equitable treatment of persons displaced from their homes, businesses, or farms by federal and federally assisted programs and to establish uniform and equitable land acquisition policies for federal and federally assisted programs.

49 Code of Federal Regulations Part 24 implements the "Uniform Act" in accordance with the following relocation assistance objective:

To ensure that persons displaced as a direct result of federal or federally-assisted projects are treated fairly, consistently and equitably so that such persons will not suffer disproportionate injuries as a result of projects designed for the benefit of the public as a whole.

While every effort has been made to assure the accuracy of this booklet, it should be understood that it does not have the force and effect of law, rule, or regulation governing the payment of benefits. Should any difference or error occur, the law will take precedence.

Some Important Definitions...

Your relocation benefits can be better understood if you become familiar with the following terms:

Comparable Replacement: means a dwelling which is:

1. Decent, safe, and sanitary. (See definition below)
2. Functionally equivalent to the displaced dwelling.
3. Adequate in size to accommodate the family being relocated.
4. In an area not subject to unreasonable adverse environmental conditions.
5. In a location generally not less desirable than the location of your displacement dwelling with respect to public utilities and

commercial and public facilities, and reasonably accessible to the place of-employment.

6. On land that is typical in size for residential development with typical improvements.

Decent, Safe and Sanitary (DS&S): Replacement housing must be decent, safe, and sanitary – which means it meets all of the minimum requirements established by federal regulations and conforms to applicable housing and occupancy codes. The dwelling shall:

1. Be structurally sound, weather tight, and in good repair.
2. Contain a safe electrical wiring system adequate for lighting and other devices.



INSPECTIONS

3. Contain a heating system capable of sustaining a healthful temperature (of approximately 70 degrees) for a displaced person, except in those areas where local climatic conditions do not require such a system.
4. Be adequate in size with respect to the number of rooms and area of living space needed to accommodate the displaced person. The City's policy is that there will be no more than 2 persons per room unless the room is of adequate size to

accommodate the normal bedroom furnishings for the occupants.

5. Have a separate, well-lighted and ventilated bathroom that provides privacy to the user and contains a sink, bathtub or shower stall, and a toilet, all in good working order and properly connected to appropriate sources of water and to a sewage drainage system.

Note: In the case of a housekeeping dwelling, there shall be a kitchen area that contains a fully usable sink, properly connected to potable hot and cold water and to a sewage drainage system, and adequate space and utility service connections for a stove and refrigerator.

6. Contains unobstructed egress to safe, open space at ground level. If the replacement dwelling unit is on the second story or above, with access directly from or through a common corridor, the common corridor must have at least two means of egress.
7. For a displaced person who is handicapped, be free of any barriers which would preclude reasonable ingress, egress, or use of the dwelling by such displaced person.

Displaced Person or Displacee: Any person who moves from real property or moves personal property from real property as a result of the acquisition of the real property, in whole or in part, or as the result of a written notice from the City to vacate the real property needed for the project. In the case of a partial acquisition, the City

shall determine if a person is displaced as a direct result of the acquisition.

Residents not lawfully present in the United States are not eligible to receive relocation payments and assistance.

Relocation benefits will vary, depending upon the type and length of occupancy. As a residential displacee, you will be classified as either a:

- An owner occupant of a residential property (includes mobile homes)
- A tenant occupant of a residential property (includes mobile homes and sleeping rooms)

Dwelling: The place of permanent or customary and usual residence of a person, according to local custom or law, including a single family house; a single family unit in a two-family, multi-family, or multi-purpose property; a unit of a condominium or cooperative housing project; a non-housekeeping unit; a mobile home; or any other residential unit.

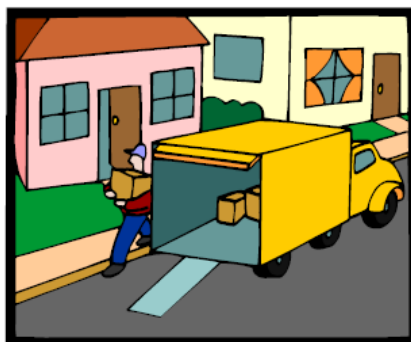
Owner: A person is considered to have met the requirement to own a dwelling if the person purchases or holds any of the following interests in real property:

1. Fee title, a life estate, a land contract, a 99-year lease, oral lease including any options for extension with at least 50 years to run from the date of acquisition; or

2. An interest in a cooperative housing project which includes the right to occupy a dwelling; or
3. A contract to purchase any interests or estates; or
4. Any other interests, including a partial interest, which in the judgment of the City warrants consideration as ownership.

Tenant: A person who has the temporary use and occupancy of real property owned by another.

Moving Expenses



If you qualify as a displaced person, you are entitled to reimbursement of your moving costs and certain related expenses incurred in moving. The methods of moving and the various types of moving cost payments are explained below.

Displaced individuals and families may choose to be paid on the basis of actual, reasonable moving costs and related expenses, or according to a fixed moving cost schedule. However, to ensure your

eligibility and prompt payment of moving expenses, you should contact your Relocation Agent before you move.

You Can Choose Either:

Actual Reasonable Moving Costs - You may be paid for your actual reasonable moving costs and related expenses when a commercial mover performs the move. Reimbursement will be limited to a move of 50 miles or less. Related expenses may include:

- Transportation
- Packing and unpacking personal property.
- Disconnecting and reconnecting household appliances.
- Temporary storage of personal property.
- Insurance while property is in storage or transit.

If you choose to base your moving benefits on Actual Moving Costs, you must obtain bids from at least two professional moving companies before the move. After the City Staff have reviewed and approved these bids, you can then either: perform a “self-move” without further documentation and get reimbursed in an amount not to exceed the lower of these two bids; have a moving company perform the actual move in which case paid, receipted and/or itemized bills from the moving company are required for payment. If you choose the “Actual Move Expense” method, you do not get the Fixed Moving Payment.

OR

Fixed Moving Cost Schedule - You may be paid on the basis of a fixed moving cost schedule. This payment will vary depending on the number of rooms you currently occupy and whether or not you own your furniture. Under this option, you will not be eligible for reimbursement of related expenses listed above. The fixed schedule is designed to cover such expenses.

Examples (Year 2014 Rate):

4 Rooms - \$ 1,295

7 Rooms - \$ 2,090

The Fixed Move Schedule for a furnished unit (e.g. you are a tenant of an apartment that is furnished by your landlord) is based on Schedule B.

Example (Year 2014 Rate):

1 Room - \$450

\$85 each additional room

A dormitory style room under the 2014 Schedule B rate would receive \$125.

Under the Fixed Move Schedule, you will not receive any additional payments for temporary storage, lodging, transportation or utility hook-ups.

Replacement Housing Payments

The type of Replacement Housing Payment (RHP) depends on whether you are an owner or a tenant, and the length of occupancy in the property being acquired.

If you are a qualified owner occupant of more than 90 days prior to the initiation of negotiations for the acquisition of your property, you may be entitled to a RHP that consists of:

**Purchase Price Differential, and.
Mortgage Differential, and
Incidental Expenses;
OR
Rental Assistance Payment**

If you are a qualified tenant occupant of at least 90 days, you may be entitled to a RHP as follows:

**Rental Assistance Payment
OR
Down payment Option**

Length of occupancy simply means counting the number of days that you actually occupied a dwelling before the date of initiation of negotiations by the City for the purchase of the property. The term "initiation of negotiations" means the date The City makes the first personal contact with the owner of real property, or his/ her representative, to give him/her a written offer for the property to be acquired.

Note: If you have been in occupancy less than 90 days before the initiation of negotiations and the property is subsequently acquired, or if you move onto the property after the initiation of negotiations and you are still in occupancy on the date of acquisition, you may or

may not be eligible for a Replacement Housing Payment. Check with your Relocation Agent before you make any decision to vacate your property.

Basic Residency Requirements

You meet the basic residency requirement if the City is acquiring the house or apartment you currently own or rent, and if you have been living there for specified number of days (defined below) at the time the City begins purchase negotiations with the owner of the property.

Residents not lawfully present in the United States are not eligible to receive relocation payments and assistance.

With few exceptions, any displaced person is eligible for relocation advisory assistance and payment for moving costs.

For Owner Occupants of 90 Days or More

If you qualify as a 90-day owner occupant, you may be eligible - in addition to the fair market value of your property - for a Replacement Housing Payment that consists of a Purchase Price Differential, Mortgage Differential and Incidental Expenses.

The **Purchase Price Differential** payment is the amount by which the cost of a replacement dwelling exceeds the acquisition cost of the

displacement dwelling. This payment will assist you in purchasing a comparable decent, safe, and sanitary (DS&S) replacement dwelling. The City will compute the maximum payment you may be eligible to receive.

In order to receive the full amount of the calculated price differential, you must spend at least the amount calculated by the City on a replacement property.

The **Mortgage Differential** payment will reimburse you for any increased mortgage interest costs you might incur because the interest rate on your new mortgage exceeds the interest rate on the property acquired by the City. The payment computation is complex as it is based on prevailing rates, your existing loan and your new loan. Also, a part of this payment may be prorated such as reimbursement for a portion of your loan origination fees and mortgage points.

To be eligible to receive this payment, the acquired property must have been encumbered by a bona fide mortgage which was a valid lien for at least 180 days prior to the initiation of negotiations.

You may also be reimbursed for any actual and necessary **Incidental Expenses** that you incur in relation to the purchase of your replacement property. These expenses may be those costs for title search, recording fees, credit report, appraisal report, and certain other closing costs associated with the purchase of property. You will not be reimbursed for any recurring costs such as prepaid real estate taxes and property insurance.

EXAMPLES OF PURCHASE PRICE DIFFERENTIAL PAYMENT COMPUTATION:

Assume that the City purchases your property for \$98,000. After a thorough study of available, decent, safe and sanitary dwellings on the open market, the City determines that a comparable replacement property will cost you \$100,000. If your purchase price is \$100,000, you will receive \$2,000 (see Example A).

If your actual purchase price is more than \$100,000, you pay the difference (see Example B). If your purchase price is less than \$100,000, the differential payment will be based on actual costs (see Example C).

City's Computation

Comparable Replacement Property	\$100,000
Acquisition Price of Your Property	<u>-\$ 98,000</u>
Maximum Purchase Price Differential	\$ 2,000

Example A

Purchase Price of Replacement	\$100,000
Comparable Replacement Property	\$100,000
Acquisition Price of Your Property	<u>-\$ 98,000</u>
Maximum Purchase Price Differential	\$ 2,000

Example B

Purchase Price of Replacement Property	\$105,000
Comparable Replacement Property	\$100,000
Acquisition Price of Your Property	<u>\$ 98,000</u>
Maximum Price Differential	\$ 2,000
You Must Pay the Additional \$5,000	

Example C

Comparable Replacement Property	\$100,000
Purchase Price of Replacement	\$ 99,000
Acquisition Price of Your Property	<u>\$ 98,000</u>
Price Differential	\$ 1,000

In Example C you will only receive \$1,000 - not the full amount of the City's "Comparable Replacement Property" because the requirements to spend were not met.

IN ORDER FOR A "90 DAY OWNER OCCUPANT" TO RECEIVE THE FULL AMOUNT OF THEIR REPLACEMENT HOUSING PAYMENT

(Purchase Price Differential, Mortgage Differential and Incidental Expenses), **you must:**

A. Purchase and occupy a DS&S replacement dwelling within one year after the later of:

- 1) The date you first receive a notification of an available replacement house, **OR**
- 2) The date that the City has paid the acquisition cost of your current dwelling (usually the closing of escrow on acquisition),

AND

B. Spend at least the amount of the City's "Comparable Replacement Property" for a replacement property,

AND

C. File a claim for relocation payments within 18 months of the later:

- 1) The date you vacate the property acquired by the City, **OR**
- 2) The date that The City has paid the acquisition cost of your current dwelling (usually the close of escrow on acquisition)

You will not be eligible to receive any relocation payments until the City has actually made the first written offer to purchase the property. Also, you will also receive at least 90 days' written notice before you must move.

For Tenants of 90 Days or More

If you qualify as a 90-day occupant, you may be eligible for a Replacement Housing Payment in the form of a Rental Assistance Payment (RAP).

The Rental Assistance Payment is designed to assist you in renting a comparable decent, safe and sanitary replacement dwelling. The payment is based on the difference between the base monthly Rent for the property acquired by the City (including average monthly cost for utilities) and the lesser of:

- a) The monthly rent and estimated average monthly cost of utilities for a comparable replacement dwelling as determined by the City, **OR**
- b) The monthly rent and estimated average monthly cost of utilities for the decent, safe and sanitary dwelling that you actually rent as a replacement dwelling.

Utility costs are those expenses you incur for heat, lights, water and sewer - regardless of the source (e.g. electricity, propane, and septic system). It does not include garbage, cable, telephone, or security. The utilities at your property are the average costs over the last 12 months. The utilities at the comparable replacement property are the estimated costs for the last 12 months for the type of dwelling and area used in the calculation.

This difference is multiplied by 42 months and may be paid to you in a lump sum payment or in periodic installments in accordance with policy and regulations.

In order to receive the full amount of the calculated Rental Assistance Payment, you must spend at least the amount calculated by the City on a replacement property.

This payment may - with certain limitations - be converted to a **Down payment Option** to assist you in purchasing a replacement property.

Calculating Your Baseline Rent

Your baseline rent is one of the numbers we use to calculate your eligibility for Rental Assistance Payment.

It is equal to your current rent (plus utilities), or 30% of your before-tax income, whichever is less. Your current rent will be determined by averaging the three-month period prior to the initiation of negotiations by the City to purchase the property you occupy. Your before-tax income will be based on the annual gross income of the household (whether it be an individual or family) that is being relocated (less certain allowed credits for elderly or disabled members of your household) divided by twelve to ascertain the average monthly income.

Let's look at two examples (in each case, the baseline rent has been highlighted):

<u>Before-tax Monthly Income</u>	<u>x 30%</u>	<u>Current Rent plus Utilities</u>
Family #1 \$1,600	\$480	\$600
Family #2 \$1,600	\$480	\$450

Family #1 has a baseline rent of \$480 because 30% of their before-tax income, \$480, is less than their current rent, \$600.

Family #2 has a baseline rent of \$450 because their current rent, \$450 is less than 30% of their income, \$480.

Remember: Your replacement housing assistance must be enough for you not to spend more than your baseline rent on comparable housing for the next 3 ½ years. (And although you are free to move into a dwelling that is more expensive than the comparable housing that the City presents to you, your benefits will not increase as a result.)

Calculating Your Rental Assistance Payment (RAP)		
Comparable * Rent Plus Utilities	Baseline Rent =	Replacement Housing Payment
Family #1 \$520 -	\$480 =	\$40 x 42 = \$1,680
Family #2 \$550 -	\$450 =	\$100 x 42 = \$4,200

*Your Relocation Agent will select the specific comparable dwelling to be used in this calculation

You will not be eligible to receive any relocation payments until the City has actually made the first written offer to purchase the property. And, you will also receive at least 90 days' written notice before you must move.

Down Payment Option

The Rental Assistance Payment may - with certain limitations - be converted to a **Down Payment Option** to assist you in purchasing a replacement property. The down payment option is a direct conversion of the Rent Assistance Payment.

If the City calculated Rent Differential is between \$0 and \$7,200, your down payment option will be \$7,200, which can be used towards the purchase of a replacement decent, safe and sanitary dwelling.

If the Rent Differential is over \$7,200, you may be able to convert the entire amount of the Rent Differential to a down payment option.

The down payment option must be used for the acquisition of the replacement dwelling, plus any eligible incidental expenses (see “90-day Owner Occupants Incidental Expenses”) related to the purchase of the property. You must work closely with your Relocation Agent to ensure you can utilize the full amount of your down payment option towards the purchase.

If any portion of the Rental Assistance Payment was used prior to the decision to convert to a down payment option, those advance payments will be deducted from the entire benefit.

Last Resort Housing

On most projects, an adequate supply of housing will be available for sale and for rent, and the benefits provided will be sufficient to enable you to relocate to comparable housing. However, there may be projects in certain locations where the supply of available housing is insufficient to provide the necessary housing for those persons being displaced. In such cases, the City will utilize a method called Last Resort Housing. Last Resort Housing allows the City to construct, rehabilitate or modify housing in order to meet the needs of the people displaced from a project. The City can also pay above the statutory limits of \$7,200, for Rental Assistance Payment and \$31,000, for a Purchase Price Differential in order to make available housing affordable.

Relocation Advisory Assistance



Any individual, family, business or farm displaced by the City shall be offered relocation advisory assistance for the purpose of locating a replacement property. Relocation services are provided by qualified personnel employed by the City. It is their goal and desire to be of service to you and assist in any way possible to help you successfully relocate.

A Relocation Agent from the City will contact you personally. Relocation services and payments will be explained to you in accordance with your eligibility. During the initial interview with you, your housing needs and desires will be determined as well as your need for assistance. You cannot be required to move unless at least one comparable replacement dwelling is made available to you.

You can expect to receive the following services, advice and assistance from your Relocation Agent who will:

- Explain the relocation benefits and eligibility requirements.

- Provide the amount of the replacement housing payments in writing.
- Assure the availability of a comparable property before you move.
- Inspect possible replacement residential units for DS&S compliance.
- Provide information on counseling you can obtain to help minimize hardships in adjusting to your new location.
- Assist you in completing Relocation Claims Forms.

AND provide information on:

- Security deposits
- Interest rates and terms
- Typical down payments
- VA and FHA loan requirements
- Real property taxes
- Consumer education literature on housing

If you desire, your Relocation Agent will give you current listings of other available replacement housing. Transportation will be provided to inspect available housing, especially if you are elderly or handicapped. You may obtain the services of a real estate broker to assist in finding a replacement dwelling but, the City cannot provide a referral.

Your Relocation Agent is familiar with the services provided by others in your community and will provide information on other federal, state, and local housing programs offering assistance to

displaced persons. If you have special problems, your Relocation Agent will make every effort to secure the services of those agencies with trained personnel who have the expertise to help you.

If the project will require a considerable number of people to be relocated, the City may establish a temporary Relocation Field Office on or near the project. Project relocation offices would be open during convenient hours and evening hours if necessary.

In addition to these services, the City is required to coordinate its relocation activities with other agencies causing displacements to ensure that all persons displaced receive fair and consistent relocation benefits.

Remember - YOUR RELOCATION AGENT is there to offer advice and assistance. Do not hesitate to ask questions and be sure you fully understand all of your rights and available benefits.



YOUR RIGHTS AS A DISPLACED

All eligible displacees have a freedom of choice in the selection of replacement housing, and the City will not require any displaced person to accept a replacement dwelling provided by the City. If you decide not to accept the replacement housing offered by the City, you may secure a replacement dwelling of your choice, providing it meets DS&S housing standards. The City will not pay more than your calculated benefits on any replacement property.

The most important thing to remember is that the replacement dwelling you select must meet the basic "decent, safe, and sanitary" standards. Do not execute a purchase agreement or a rental agreement until a representative from the City has inspected and certified in writing that the dwelling you propose to occupy meets the basic standards. **DO NOT jeopardize** your right to receive a replacement housing payment by moving into a substandard dwelling.

It is important to remember that your relocation benefits will not have an adverse affect on your:

- Social Security Eligibility
- Welfare Eligibility

- Income Taxes

Relocation Tax Consequences

In general, relocation payments are not considered income for tax purposes. Benefit payments are paid under Title 24 of the Code of Federal Regulation and Chapter 16 of the California Government Code. If certain requirements are met, such payments will not be considered as income for the purposes of income tax and public assistance programs. In any case, please check with either your Relocation Agent or a qualified tax consultant if you have specific questions.

For property owners who are displaced by government action, the State of California has created provisions to ensure that the lower real estate assessment guaranteed to property owners through Proposition 13 will be maintained for the comparable replacement property. In June 1982, the State electorate approved transfer of the assessment valuation of the former dwelling to the replacement dwelling, with certain restrictions. County of Los Angeles Assessor's Office applications for this purpose are available upon request through your relocation representative. What this means is that if any public agency buys your property under the Eminent Domain process, you can carry your current tax basis with you when you purchase a replacement property, as long as the replacement doesn't exceed 120% of the purchase price the public agency pays you for your property.

90-Day Notice to Move

It is required by law that all persons displaced by government action are given at least 90 days notice before they are required to move. This 90-Day Notice must be given in writing. In this way, you will be informed well in advance of the date by which your move should take place.

When the City Becomes Your Landlord

Our hopes are that by the time that the City completes the purchase of the property you now occupy, or takes legal possession of the property by the process of Eminent Domain, you will have found a replacement property and will be prepared to move. If, for some reason, this has not happened, the City will become your landlord until you do relocate. Before you move, and if you are currently a tenant, you will make your regularly scheduled rental payments to the City instead of your current landlord. The City will charge you the lessor of:

- The rent you were paying to your landlord on the date of the initiation of negotiations to purchase the property, **OR**
- 30% of your gross average monthly income

If you are an owner/occupant, the City will charge you the lessor of:

- A rent based on a fair market rent for comparable dwelling in your neighborhood, **OR**
- 30% of your gross average monthly income.

Housing Discrimination

In addition, the Title VIII of the Civil Rights Act of 1968 and later acts and amendments make discriminatory practices in the purchase and rental of most residential units illegal if based on race, color, religion, sex, or national origin.

Whenever possible, minority persons shall be given reasonable opportunities to relocate to decent, safe, and sanitary replacement dwellings, not located in an area of minority concentration, and that is within their financial means. This policy, however, does not require the City to provide a larger payment than is necessary to enable a person to relocate to a comparable replacement dwelling.

The City's Non-Discrimination Policy ensures that all services and/or benefits will be administered to the general public without regard to race, color, national origin, or sex in compliance with Title VI of the 1964 Civil Rights Act (42 USC 2000d. et seq.).

By calling 1-800-477-5977 you may quickly be referred to a local agency in your area to file a housing discrimination complaint.

If You Have a Disagreement or Complaint

You have the Right to Appeal any decision by the City regarding your relocation benefits and eligibility.

Your Right of Appeal is guaranteed in the "Uniform Act" which states that any person may file an appeal with the head of the responsible

agency if that person believes that the agency has failed to properly determine the person's eligibility or the amount of a payment.

If you indicate your dissatisfaction, either verbally or in writing, the City will assist you in filing an appeal and explain the procedures to be followed. You will be given a prompt and full opportunity to be heard. You have the right to be represented by legal counsel or other representative in connection with the appeal (but solely at your own expense).

The City will consider all pertinent justifications and materials submitted by you and other available information needed to ensure a fair review. The City will provide you with a written determination resulting from the appeal with an explanation of the basis for the decision. If you are still dissatisfied with the relief granted, the City will advise you that you may seek judicial review.

land solutions for the public good



Epic Land Solutions, Inc. 

Residential Relocation Brochure
UNIFORM ACT
Effective Sept. 04, 2015

EXHIBIT G

HUD Income Limits

The following figures are approved by the U.S. Department of Housing and Community Development for use in the County of Orange to define and determine housing eligibility by income level of 2015.

Area Median: \$87,200			
Persons In Family	Extremely Low	Very Low	Low
1	\$20,250	\$33,750	\$53,950
2	\$23,150	\$38,550	\$61,650
3	\$26,050	\$43,350	\$69,350
4	\$28,900	\$48,150	\$77,050
5	\$31,250	\$52,050	\$83,250
6	\$33,550	\$55,900	\$89,400
7	\$36,730	\$59,750	\$95,550
8	\$40,890	\$63,600	\$101,750

EXHIBIT H

Public Comments and Responses

No Comments were received during the 30 day public review and comment period between March 31, 2016 to April 30, 2016.