

Attachment A

Relocation Plan



301 E. Balboa Boulevard Project
RELOCATION PLAN

PREPARED FOR:

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Newport Beach, CA 92660
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INTRODUCTION

The City of Newport Beach (City) acquired a property located at 301 E. Balboa Boulevard, Newport Beach, CA 92661 (Project site or Property). The Property is currently improved with a four-plex comprised of four residential rental units, two of which are tenant occupied.

The 301 E. Balboa Boulevard Project (Project) will require the demolition of the existing structure/units for potential temporary use by the fire department, and future development use. The acquisition and proposed Project is anticipated to be financed through the City's general funds.

The City retained Overland, Pacific & Cutler, LLC (OPC), a TranSystems company, to prepare a Relocation Plan (Plan) to address existing tenant future displacements. This Plan conforms to the requirements of 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 as in Title 25, California Code of Regulations Section 6000, et seq. (Guidelines), and AB 1482.

When the proposed Project moves forward, it would cause the permanent displacement of two tenant households who would be eligible for relocation benefits and assistance. The needs and characteristics of the tenants and the City's program to provide assistance to each affected person are general subjects of this Relocation Plan (Plan).

This Plan is organized in five sections:

1. Project description (**SECTION I**);
2. Assessment of the relocation needs of persons subject to displacement (**SECTION II**);
3. Assessment of available comparable replacement housing units within proximity to the Project site (**SECTION III**);
4. Description of the City's relocation program (**SECTION IV**);
5. Description of the City outreach efforts, Project timeline and budget (**SECTION V**).

I. PROJECT DESCRIPTION

A. REGIONAL LOCATION

The Project site is located in the City of Newport Beach in Orange County and is conveniently located just minutes from Highways 1 and 55. (*Figure 1: Regional Project Location*). Adjacent communities include Laguna Beach, Huntington Beach and Costa Mesa.

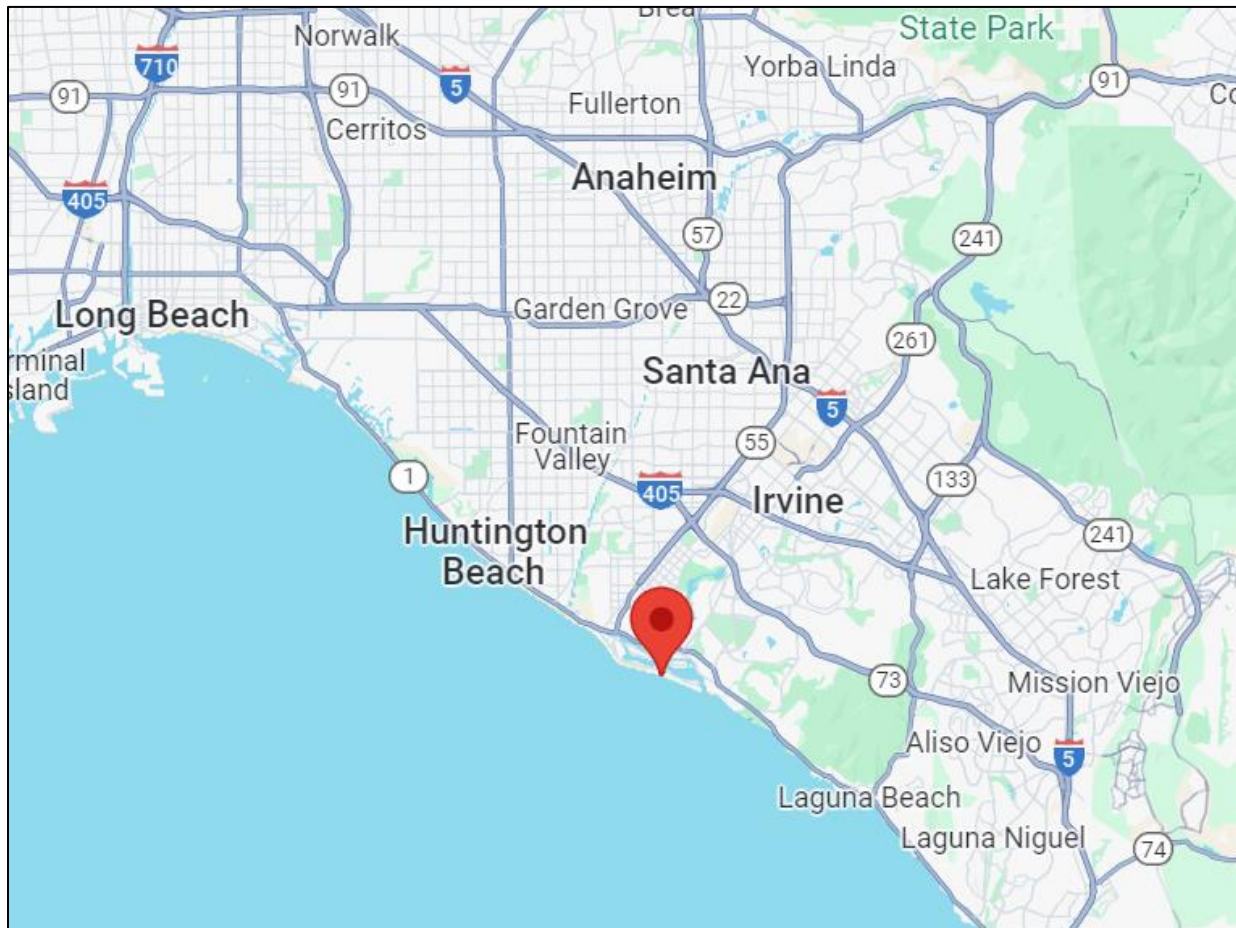


Figure 1: Regional Project Location

B. PROJECT SITE LOCATION AND DESCRIPTION

The Project site consists of one parcel (0.06 acres) located at 301 E. Balboa Boulevard, Newport Beach, CA 92661 generally bordered by E. Oceanfront, Adams Street, E. Balboa Boulevard, and Coronado Street. The site is currently improved with one building comprised of three permitted residential rental units and one unoccupied non-permitted unit, as shown in *Figures 2 & 3: Project Site Location – 301 E. Balboa Boulevard*.



Figure 2: Project Site Location – 301 E. Balboa Boulevard

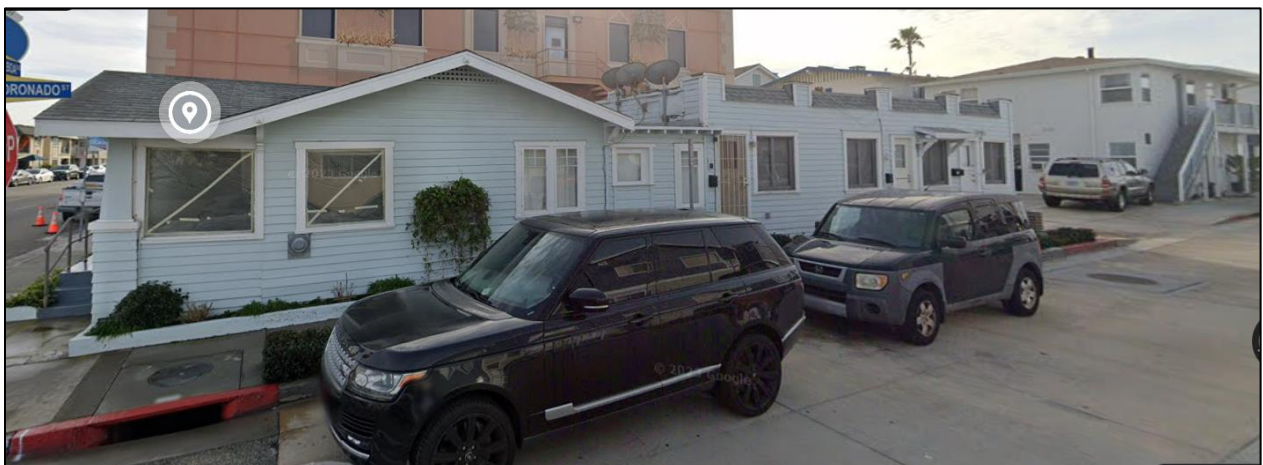


Figure 3: Project Site Location – 301 E. Balboa Boulevard (Street View)

II. ASSESSMENT OF RELOCATION NEEDS

A. SURVEY METHOD

To obtain information necessary for the preparation of this Plan, personal interviews with both existing households were initially conducted by OPC staff in September 2024 and subsequently updated in June 2025. OPC was successful in conducting a follow-up interview with one of the two households. The data in this section of the Plan is based on the responses of interviewed individuals who provided verbal information about the households. At this time, the information is unconfirmed.

Inquiries made of the residential occupants concerned household size and composition, income, monthly rent and estimated utility costs, length of occupancy, ethnicity, home language, physical disabilities, relocation needs, and replacement housing preferences.

B. TENANT DATA

1. Current Occupants

There are currently two households living on the Project site who would be eligible for relocation assistance. The households are comprised of two adults and no children (17 years or younger) for a total of two site occupants.

The households occupy a studio and a one-bedroom unit and pay \$1,289 - \$1,546 per month with all utilities included in the rent.

2. Replacement Housing Needs

Replacement housing needs, as expressed in this plan, are defined by the total number of required replacement units and distribution of those units by bedroom size. The projected number of required units by bedroom size is calculated by comparing current data for household size with the City's replacement housing occupancy standards. These standards, generally, allow for up to two persons in a studio unit, three persons in a one-bedroom unit, five persons in a two-bedroom unit, seven persons in a three-bedroom unit and nine or more persons in a four-bedroom unit.

Based on available tenant data, there are no overcrowded units. The replacement units required for the two impacted households include a studio unit and a one-bedroom unit.

The Project site is within a densely populated mixed-use area with retail shopping, personal services, restaurants, medical facilities, parks, schools, public facilities, social services, and public transportation.

3. Income

Verbal information regarding gross household income for both households was provided by the Project households. According to income standards for Orange County (**Exhibit A**) adjusted for family size as published by the United States Department of Housing and Urban Development (HUD), the households may qualify as Low Income (51% - 80% AMI).

4. Ethnicity/Language

The interviewed households stated their ethnicity as White. Both households speak, read and understand English.

5. Senior/Handicapped Households

Neither of the tenants reported being seniors over the age of 62 or having any disabilities.

If specific special needs are identified when the project occupants are ultimately displaced, appropriate steps will be taken to accommodate those needs and to locate or modify suitable replacement housing. Mobility challenges will be addressed as it relates to replacement housing, including the need for a first-floor unit or unit in a building with an elevator, as well as potentially identifying an ADA compliant unit ADA, if applicable.

6. Preferred Area to Relocate

The interviewed households expressed interest in staying in the immediate area and within Newport Beach to remain close to a gym and preferred shopping areas.

III. RELOCATION RESOURCES

A. METHODOLOGY

For residential housing, a resource survey was conducted to identify available comparable rental units within proximity to the Project site. The following sources were utilized:

- Classified rental listings from local newspapers and *For Rent* publications
- Internet sources of rental opportunities

B. REPLACEMENT HOUSING AVAILABILITY

1. Residential Rental Housing

An updated replacement housing survey was conducted in June 2025 that considered available studio and one- bedroom apartments for rent in Newport Beach and within proximity to the Project site. This data as of the date of this Plan ultimately located within five miles of the Project site is summarized in **Table 1** below and in **Exhibit B**.

Table 1: Availability and Cost of Replacement Rental Housing		
# of Bedrooms	Studio	One
# Found (# Needed)	5 (1)	6 (1)
Rent Range	\$1,791 - \$2,195	\$2,051 - \$2,800
Median Rent	\$2,000	\$2,400

The available units identified were in residential and mixed-use neighborhoods with access to restaurants, retail stores, medical facilities, social services, public transportation, parks, schools and opportunities for employment.

The median rent amount shown in the table is among the figures used to make benefit and budget projections for the Plan. This amount is, naturally, subject to change according to the market rates prevailing at the time of displacement.

2. Summary

Considering the above-described availability of replacement housing resources gathered, it appears there are an adequate number of replacement units for the residential occupants.

While adequate replacement resources exist for the tenants, based on survey results of rental opportunities and the tenants' current rent, some tenants may have an increase in monthly rent. Possible increases, if any, will be met through the City's obligation under the relocation regulations, including Last Resort Housing (LHR) requirements. (See Section IV, E).

C. RELATED ISSUES

1. Concurrent Residential Displacement

There are no known public projects anticipated in the Project area that will cause significant displacements during the timeframe of anticipated initiation of Project displacements. No residential displacee will be required to move without both adequate notice and access to available, comparable, affordable, decent, safe and sanitary housing.

IV. THE RELOCATION PROGRAM

The City's Relocation Program is designed to minimize hardship, be responsive to unique Project circumstances, emphasize maintaining personal contact with all affected individuals, consistently apply all regulatory criteria to formulate eligibility and benefit determinations and conform to all applicable requirements. The relocation program to be implemented by the City will conform with the standards and provisions of 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), and AB 1482.

The City has retained OPC, a multi-lingual consulting firm, to administer the Relocation Program for the tenants. OPC has worked on more than 5,000 public acquisition and relocation projects for more than 46 years. Experienced City staff will monitor the performance of OPC and be responsible to approve or disapprove OPC recommendations concerning eligibility and benefit determinations per applicable program requirements.

OPC staff will be available to assist any relocated person and/or household with questions about the relocation process, relocation counseling and/or assistance in relocating. Relocation staff can be contacted at **(800) 400-7356** from 8:00 am to 5:00 pm Monday through Friday and are available via voicemail and/or cellular phones after hours. Relocation staff will assist tenants at hours convenient for the residents. The Relocation Office is located at **5000 Airport Plaza Drive, Suite 250, Long Beach, CA 90815**.

Eligible individuals, who need to permanently move from their existing home, will receive relocation assistance. All households will be eligible for relocation assistance under the CRAL/State Guidelines.

The relocation program under the CRAL/Guidelines consists of two principal constituents: advisory assistance and financial assistance (Relocation Benefits).

A. ADVISORY ASSISTANCE

Advisory assistance services are intended to:

- inform tenants about the relocation program
- help in the process of finding appropriate replacement accommodations
- facilitate claims processing
- maintain a communication link with the City
- coordinate the involvement of outside service providers

To follow through on the advisory assistance component of the relocation program and assure that the City meets its obligations under the law, relocation staff will perform the following functions:

1. Distribute appropriate written information concerning the City's relocation program;
2. Inform eligible project occupants of the nature of, and procedures for, obtaining available relocation assistance and benefits (**Exhibit C**);
3. Determine the needs of each displacee eligible for assistance;
4. Provide the tenants with at least three referrals to comparable replacement housing within a reasonable time prior to displacement;
5. Maintain an updated database of available housing resources, and distribute referral information to displacees for the duration of the Project;
6. Provide transportation to the displacees, if necessary, to inspect replacement sites within the local area;
7. Inspect replacement housing to assure it meets decent, safe and sanitary standards as described in the Guidelines and per City standards and requirements;
8. Supply information concerning federal and state programs and other governmental programs providing assistance to displaced persons;
9. Assist eligible occupants in the preparation, and submission, of relocation assistance claims;
10. Provide additional reasonable services necessary to successfully relocate occupants;
11. Make benefit determinations and payments in accordance with applicable relocation law and the City's adopted relocation guidelines;
12. Assure that no occupant is required to move without a minimum of 90 days written notice to vacate;
13. Inform all persons subject to displacement of the City's policies with regard to eviction and property management;
14. Establish and maintain a formal grievance procedure for use by displaced persons seeking administrative review of the City's decisions with respect to relocation assistance; and
15. Provide assistance that does not result in different or separate treatment based on or due to an individual's sex, marital status, race, color, religion, ancestry, national origin, physical handicap, sexual orientation, and domestic partnership status.

B. RELOCATION BENEFITS

Specific eligibility requirements and benefit plans will be detailed on an individual basis with the impacted households. In the course of a personal interview and follow-up visits, each household will be counseled as to available options and the consequences of any choice with respect to financial assistance.

Relocation benefits will be provided in accordance with the provisions of California State Relocation Law and Guidelines, and the City's rules and procedures pertaining thereto. Benefits will be paid to eligible displaced person upon submission of required claim forms and documentation in accordance with the City's normal administrative procedures.

The City will process advance payment requests to mitigate hardships for tenants who do not have access to sufficient funds to pay move-in costs such as first month's rent and/or security deposits. Approved requests will be processed expeditiously to help avoid the loss of desirable, appropriate replacement housing.

Tenants who are permanently displaced will be eligible for the following assistance:

1. Residential Moving Expense Payments

All eligible residential occupants to be permanently relocated will be eligible to receive a payment for moving expenses. Moving expense payments will be made based upon the actual cost of a professional move, the actual cost of a self-move not to exceed the fees charged by a professional mover or a self-move fixed payment based on a room-count schedule, or a combination of options.

a. Actual Cost (Professional Move)

Displacees may elect to have a licensed professional mover perform the move. The actual cost of the moving services, based on at least two acceptable bids, will be compensated by the City in the form of a direct payment to the moving company upon presentation of an invoice. Transportation costs are limited to a distance of 50 miles in either case. In addition to the actual move, costs associated with utility re-connections (i.e., gas, water, electricity, telephone, and cable, if any), are eligible for reimbursement.

b. 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 or ancillary structures on the property. In this case, the person to be relocated takes full responsibility for the move. The fixed payment includes all utility connections as described in (a), above.

The current schedule for fixed moving payments is set forth in **Table 2** on the following page:

TABLE 2: Schedule of Fixed Moving Payments (effective as of August 2021)	
Unfurnished Dwelling	
One room	\$780
Two rooms	\$1,000
Three rooms	\$1,250
Four rooms	\$1,475
Five rooms	\$1,790
Six rooms	\$2,065
Seven rooms	\$2,380
Eight rooms	\$2,690
each additional room	\$285
Furnished Dwelling	
First Room	\$510
Each additional room	\$100

c. Self-Move Payment (based on actual costs to move)

The tenant may elect to claim a self-move payment based on reimbursement for actual costs incurred with the move (packing materials, transport rental, etc.) not to exceed the fees charged by a professional mover. In this case, the person to be relocated takes full responsibility for the move. In addition to the actual move, costs associated with utility re-connections (i.e., gas, water, electricity, telephone, and cable, if any), are eligible for reimbursement.

2. Rental Assistance for Tenant Occupants Who Choose to Rent

To be eligible to receive the rental assistance benefits, the displaced tenant household must rent or purchase and occupy a decent, safe, and sanitary replacement dwelling within one year from the date they move from the displacement dwelling.

Except in the case of Last Resort Housing situations (Section E, Page 14), payments to households will be payable over a 42-month period and limited to a total maximum payment of \$5,250 as stated in the Guidelines. (More information regarding rental assistance and Last Resort Housing will be provided in detail in the informational brochure (**Exhibit C**) that will be provided to each household at the initiation of relocation activities.)

Table 3 on the following page portrays **an example** of a benefits determination under the State relocation program (including State income deductions):

TABLE 3: Example Computation of Rental Assistance Payments		
1. Old Rent	\$650	Old Rent and Utilities
or		
2. Ability to Pay	\$700	30% Adjusted, Monthly, Gross Household Income (State)*
3. Lesser of lines 1 or 2	\$650	Base Monthly Rental
Subtracted From:		
4. Actual New Rent	\$750	Actual New Rent and Utilities
or		
5. Comparable Rent	\$775	Determined by District (includes utilities)
6. Lesser of lines 4 or 5	\$750	
7. Yields Monthly Need:	\$100	Subtract line 3 from line 6
Rental Assistance	\$4,200	Multiply line 7 by 42 months

*Gross adjusted income means the total amount of monthly income of a household less the following: (1) a deduction for each dependent in excess of three; (2) a deduction of 10% of total income for the elderly or disabled head of household; (3) a deduction for recurring extraordinary medical expenses defined for this purpose to mean medical expenses in excess of 3% of total income, where not compensated for, or covered by insurance or other sources; (4) a deduction of reasonable amounts paid for the care of children or sick or incapacitate family members when determined to be necessary to employment of head of household or spouse, except that the amount shall not exceed the amount of income received by the person who would not otherwise be able to seek employment in the absence of such care.

Rental Assistance payment amounts are equal to 42 times the difference between the base monthly rent and the lesser of:

- (i) The monthly rent and estimated average monthly cost of utilities for a comparable replacement dwelling; or
- (ii) The monthly rent and estimated average monthly cost of utilities for the decent, safe, and sanitary replacement dwelling actually occupied by the displaced person.

The base monthly rent for the displacement dwelling is the lesser of:

- (i) The average monthly cost for rent and utilities at the displacement dwelling for a reasonable period prior to displacement, as determined by the City; or
- (ii) Thirty percent (30%) of the displaced person's average, adjusted monthly gross household income. If a tenant refuses to provide appropriate evidence of income or is a dependent, the base monthly rent shall be determined to be the average monthly cost for rent and utilities at the displacement dwelling; or

- (iii) The total of the amount designated for shelter and utilities if receiving a welfare assistance payment from a program that designated the amounts for shelter and utilities

4. Downpayment Assistance to Tenants Who Choose to Purchase

The displaced household may opt to apply the entire benefit amount for which they are eligible toward the purchase of a replacement unit.

Residential tenants, who are otherwise eligible to receive the Rental Assistance Payment described above, may choose to receive a lump sum payment equal to forty-two months of rental subsidy (including Last Resort Housing benefits) to purchase a new home.

A displaced household, who chooses to utilize up to the full amount of their rental assistance eligibility (including any Last Resort benefits) to purchase a home, will have the funds deposited in an open escrow account, provided that the entire amount is used for the downpayment and eligible, incidental costs associated with the purchase of a decent, safe, and sanitary replacement home. A provision shall be made in the escrow arrangements for the prompt return of the City funds, in the event escrow should fail to close within a reasonable period of time.

Final determination about the type of relocation benefits and assistance for which the household is eligible will be determined upon verification of the household's occupants, length of occupancy and income.

C. PROGRAM ASSURANCES AND STANDARDS

Adequate funds are available to relocate the Project households. Relocation assistance services will be provided to ensure that displacement does not result in different or separate treatment of households based on race, nationality, color, religion, national origin, sex, marital status, familial status, disability or any other basis protected by the federal Fair Housing Amendments Act, the Americans with Disabilities Act, Title VI of the Civil Rights Act of 1964, Title VIII of the Civil Rights Act of 1968, the California Fair Employment & Housing Act, and the Unruh Act, as well as any other arbitrary or unlawful discrimination.

D. GENERAL INFORMATION REGARDING THE PAYMENT OF RELOCATION BENEFITS

Claims and supporting documentation for relocation benefits must be filed with the City no later than 18 months after the date of displacement.

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

1. Claimant(s) will provide all necessary documentation to substantiate eligibility for assistance;
2. Relocation and City staff will review all necessary documentation including, but not limited to, scopes-of-service, invoices, lease documents and escrow material before reaching a determination as to which expenses are eligible for compensation;
3. Required claim forms will be prepared by relocation staff and presented to the claimant for review. Signed claims and supporting documentation will be returned to relocation staff and submitted to the City;
4. The City will review and approve claims for payment, or request additional information;
5. The City will issue benefit checks to claimants in the most secure, expeditious manner possible;
6. Final payments to residential displacees will be issued after confirmation that the Project premises have been completely vacated, and actual residency at the replacement unit is verified;
7. Receipts of payment and all claims' materials will be maintained in the relocation case file.

E. LAST RESORT HOUSING

Based on housing cost and income data derived from the occupants and costs of replacement housing resources, it is anticipated that “comparable replacement housing” may not be available as required for the households. Specifically, for renters, when the computed replacement housing assistance eligibility exceeds \$5,250 or replacement dwelling monthly rental costs (including utilities and other reasonable recurring expenses) exceeds 30% of the person’s average monthly income, Last Resort Housing must be provided.

Therefore, if the Project is to go forward, the City will authorize funds to provide housing of last resort. In this situation, funds will be used to make payments in excess of the monetary limit specified in the statute (\$5,250); hence, satisfying the requirement that “comparable replacement housing” is available.

A displaced tenant household will be entitled to consideration for supplementary benefits in the form of Last Resort Housing assistance when the computed replacement housing assistance eligibility exceeds \$5,250 or replacement dwelling monthly rental costs (including utilities and other reasonable recurring expenses) exceed 30% of the person’s average monthly income (financial means).

Recipients of Last Resort rental assistance, who intend to purchase rather than re-rent replacement housing, will have the right to request a lump sum payment of all benefits in the form of downpayment assistance. Tenant households receiving periodic payments will have the option to request a lump sum payment of remaining benefits to assist with the purchase of a decent, safe and sanitary dwelling.

F RELOCATION TAX CONSEQUENCES

In general, relocation payments are not considered income for the purpose of Division 2 of the Internal Revenue Code of 1954, which has been redesignated as the Internal Revenue Code of 1986 (Title 26, U. S. Code), or for the purpose of determining the eligibility or the extent of eligibility of any person for assistance under the Social Security Act (42 U. S. Code 301 et seq.) or the Personal Income Tax Law, Part 10 (commencing with Section 17001) of the Revenue and Taxation Code, or the Bank and Corporation Tax Law, Part II (commencing with Section 23001) of Division 2 of the Revenue and Taxation Code. The above statement on tax consequences is not intended as tax advice by the City or OPC. Tenants are responsible for consulting with their own tax advisors concerning the tax consequences of relocation payments.

V. ADMINISTRATIVE PROVISIONS

A. STATE RELOCATION LAW NOTICES

Each notice, which the City is required to provide to a Project site occupant, shall be personally delivered or sent by certified or registered first-class mail, return receipt requested or email with confirmation and documented in the case file. Each notice will be written in plain, understandable language. Each notice will indicate the name and telephone number of a person who may be contacted for answers to questions or other needed help.

There are three principle notices required under California Relocation Law and Guidelines:

- 1) Informational Statement
- 2) Notice of Relocation Eligibility
- 3) 90- Day Vacate Notice

The Informational Statement is intended to provide potential relocatees with a general written description of the City's relocation program and basic information concerning benefits, conditions of eligibility, noticing requirements and appeal rights (**Exhibit C**).

A Notice of Relocation Eligibility (NOE) will be distributed to each displaced household. The NOE to the residential tenants contains a determination of eligibility for relocation assistance under specific relocation programs and a computation of maximum entitlements based on information provided by the affected household and the analysis of comparable replacement properties identified by relocation staff.

No lawful occupant will be required to move without having received at least 90 days' advance written notice of the earliest date by which the move will be necessary. A date-specific vacate notice will not be issued to any tenants before comparable replacement dwellings have been made available to them.

In addition to the three principal notices, relocation staff will issue timely written notification in the form of a Reminder Notice, which discusses the possible loss of rights and sets the expiration date for the loss of benefits to those persons who:

- 1) are eligible for monetary benefits,
- 2) have moved from the acquired property, and
- 3) have not filed a claim for benefits.

A Reminder Notice will be issued to all non-responsive relocatees no later than within the last six months prior to the filing expiration date.

B. PRIVACY OF RECORDS

All information obtained from tenants is considered confidential and will not be shared without the consent of the tenant or the City. The City and relocation staff will comply with federal regulations concerning the safeguarding of relocation files and their contents.

C. GRIEVANCE PROCEDURES

A person who is dissatisfied with a determination as to eligibility for benefits, a payment amount, the failure to provide comparable housing, or the City's property management practices may file a Relocation Assistance Appeal Form or any other written form of appeal with the City and have the right of administrative review. The City's appeal policies will follow the standards described in Article 5, Section 6150 et seq., Title 25, Chapter 6, State of California, Department of Housing and Community Development Program guidelines.

Requests for administrative review and informal hearings will be directed to the Real Property Administrator, Lauren Wooding Whitlinger, at lwooding@newportbeachca.gov. All requests for review will receive written responses from the City within three weeks of their receipt. If an informal appeal is denied, appellants will be entitled to file a written request for a formal hearing before an impartial and independent hearing officer.

The appellant does not have to exhaust administrative remedies first; the appeal/grievance can either go directly to HCD or directly to the Court. Any person and/or organization directly affected by the relocation plan may petition the Department of Housing and Community Development (HCD), located at 651 Bannon Street, Sacramento, CA 95811 to review the relocation plan or HCD can be contacted at 916-263-2769.

More detail concerning the appeals process will be provided upon request. Appellants will retain their appeal rights for up to 18 months following the date of displacement from the Project premises or receipt of final payment for relocation benefits, whichever is later.

D. EVICTION POLICY

1. Eviction may cause the forfeiture of a tenant's right to relocation assistance or benefits. Relocation records will be documented to reflect the specific circumstances surrounding any eviction action.
2. Eviction may be undertaken for one, or more of the following reasons:
 - (a) Failure to pay rent, except in those cases where the failure to pay is due to the City's failure to keep the premises in habitable condition; is the result of harassment or retaliatory action; or, is the result of discontinuation, or a substantial interruption of services;
 - (b) Performance of a dangerous, and/or illegal act in the unit;
 - (c) A material breach of the rental agreement, and failure upon notification to correct said breach within 30 days of Notice;
 - (d) Maintenance of a nuisance, and failure to abate such nuisance upon notification within a reasonable time following Notice;
 - (e) Refusal to accept one of a reasonable number of offers of replacement dwellings; and/or,
 - (f) A requirement under State, or local law or emergency circumstances that cannot be prevented by reasonable efforts on the part of the City.

E. RESIDENT/CITIZEN PARTICIPATION

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

1. Provide affected tenants with full and timely access to documents relevant to the relocation program;
2. Encourage meaningful participation in reviewing the relocation plan and monitoring the relocation assistance program;
3. Provide technical assistance necessary to interpret elements of the Relocation Plan and other pertinent materials (the Project households were provided with a copy of the Relocation Plan for review and comment);
4. Issue a general notice concerning the availability of the Plan for public review, as required, 30 days prior to its proposed approval (the Project households were provided an Advisory Notice regarding the comment period with a copy of the Relocation Plan); and
5. Include written or oral comments concerning the Plan as an attachment (**Exhibit D**) when it is forwarded to City Council for approval.

F. PROJECTED DATE OF DISPLACEMENT

Date specific 90-Day will be issued to the Project households no earlier than **August 2025**.

G. ESTIMATED RELOCATION COSTS

The total budget estimate for tenant relocation benefits payments for this Project, including a 15% contingency, is **\$88,000.00** (rounded). The estimated relocation budget does not include any payments related to property acquisition or relocation assistance services.

If the Project is implemented, and circumstances arise that should change either the number of residential occupants and/or the amount of relocation benefits' entitlements estimated, the City will authorize any additional funds that may need to be appropriated. The City pledges to appropriate, on a timely basis, the funds necessary to ensure the successful completion of the Project, including funds necessary for LRH as indicated in Section IV, E, of this Plan to meet its obligation under the relocation regulations.

EXHIBIT A

HUD INCOME LIMITS – ORANGE COUNTY

The following figures are approved by the U. S. Department of Housing and Urban Development (HUD) for use in the **County of Orange** to define and determine housing eligibility by income level.

Area Median Income: \$136,600			
Family Size	Extremely Low	Very Low	Low
1 Person	35,550	59,250	94,750
2 Person	40,600	67,700	108,300
3 Person	45,700	76,150	121,850
4 Person	50,750	84,600	135,350
5 Person	54,850	91,400	146,200
6 Person	58,900	98,150	157,050
7 Person	62,950	104,950	167,850
8 Person	67,000	111,170	178,700

Figures are per the Department of Housing and Urban Development (California), **updated in April 2025.**

EXHIBIT B

AVAILABLE COMPARABLE HOUSING

Address	BR	Rent	Distance
880 Irvine Ave #123, Newport Beach, CA 92663	1	\$2,051.00	4
880 Irvine Ave, Newport Beach, CA 92663	1	\$2,095.00	4
705 E Balboa Blvd Unit B, Newport Beach, CA 92661	1	\$2,150.00	0.2
880 Irvine Ave #456, Newport Beach, CA 92663	1	\$2,184.00	4
1 Park Newport, Newport Beach, CA 92660	1	\$2,665.00	2
1530 Miramar Dr Unit 3, Newport Beach, CA 92661	1	\$2,800.00	1.1
880 Irvine Ave #787, Newport Beach, CA 92663	0	\$1,791.00	4
880 Irvine Ave #964, Newport Beach, CA 92663	0	\$1,895.00	4
880 Irvine Ave #145, Newport Beach, CA 92663	0	\$1,961.00	4
1525 Placentia Ave, Newport Beach, CA 92663	0	\$2,170.00	3.1
1433 Superior Ave, Newport Beach, CA 92663	0	\$2,195.00	3.1

EXHIBIT C

INFORMATIONAL STATEMENT

**Relocation Assistance
Informational Statement
for Families and Individuals**

(CA State)

Owner:

City of Newport Beach

Project Name:

301 E. Balboa Boulevard

Owner Representative:

Overland, Pacific & Cutler, LLC (OPC),
a TranSystems company
5000 Airport Plaza Drive, Suite 250
Long Beach, CA 90815
Phone: (800) 400-7356

Informational Statement Content:

1. General Information
2. Assistance in Locating a Replacement Dwelling
3. Moving Benefits
4. Replacement Housing Payment - Tenants and Certain Others
5. Qualification for and Filing of Relocation Claims
6. Last Resort Housing Assistance
7. Evictions
8. Appeal Procedures – Grievance
9. Tax Status of Relocation Benefits
10. Non-Discrimination and Fair Housing
11. Additional Information and Assistance Available

Spanish speaking agents are available. Si necesita esta información en español, por favor llame a su agente.

Informational Statement for Families and Individuals

(CA State)

1. GENERAL INFORMATION

The dwelling in which you now live is in a project area to be improved by, or financed through, the Owner using state and/or local funds. If and when the project proceeds, and it is necessary for you to move from your dwelling, you may be eligible for certain benefits. You will be notified in a timely manner as to the date by which you must move. Please read this information, as it will be helpful to you in determining your eligibility and the amount of relocation benefits you may receive under state law. You will need to provide adequate and timely information to determine your relocation benefits. The information is voluntary, but if you don't provide it, you may not receive the benefits, or it may take longer to pay you. We suggest you save this informational statement for reference.

The Owner has retained the professional firm of **Overland, Pacific & Cutler, LLC (OPC), a TranSystems company**, to provide relocation assistance to you. The firm is available to explain the program and benefits. Their address and telephone number are listed on the cover.

PLEASE DO NOT MOVE PREMATURELY. THIS IS NOT A NOTICE TO VACATE YOUR DWELLING. However, if you desire to move sooner than required, you must contact your agent at OPC, so you will not jeopardize any benefits. This is a general informational brochure only and is not intended to give a detailed description of either the law or regulations pertaining to the Owner's relocation assistance program.

Please continue to pay your rent to the Owner, otherwise you may be evicted and jeopardize the relocation benefits to which you may be entitled to receive.

2. ASSISTANCE IN LOCATING A REPLACEMENT DWELLING

The Owner, through its representatives, will assist you in locating a comparable replacement dwelling by providing referrals to appropriate and available housing units. You are encouraged to actively seek such housing yourself.

When a suitable replacement dwelling unit has been found, your relocation agent will carry out an inspection and advise you as to whether the dwelling unit meets decent, safe and sanitary housing requirements. A decent, safe and sanitary housing unit provides adequate space for its occupants, proper weatherproofing and sound heating, electrical and plumbing systems. Your new dwelling must pass inspection before relocation assistance payments can be authorized.

3. MOVING BENEFITS

If you must move as a result of displacement by the Owner, you will receive a payment to assist in moving your personal property. The actual, reasonable and necessary expenses for moving your household belongings may be determined based on the following methods:

- A Fixed Moving Payment based on the number of rooms you occupy (see below); **or**
- A payment for your Actual Reasonable Moving and Related Expenses based on at least two written estimates and receipted bills; **or**
- A combination of both (in some cases).

For example, you may choose a Self-Move, receiving a payment based on the Fixed Residential Moving Cost Schedule shown below, plus contract with a professional mover to transport your grand piano

and /or other items that require special handling. In this case, there may be an adjustment in the number of rooms which qualify under the Fixed Residential Moving Cost Schedule.

A. Fixed Moving Payment (Self-Move)

A Fixed Moving Payment is based upon the number of rooms you occupy and whether or not you own your own furniture. The payment is based upon a schedule approved by the Owner, and ranges, for example, from \$510.00 for one furnished room to \$2,690.00 for eight rooms in an unfurnished dwelling. (For details see the table). Your relocation agent will inform you of the amount you are eligible to receive, if you choose this type of payment.

If you select a fixed payment, you will be responsible for arranging for your own move, and the Owner will assume no liability for any loss or damage of your personal property. A fixed payment also includes utility hook-ups and other related moving fees.

Fixed Moving Schedule CALIFORNIA (Effective 2021)	
Occupant Owns Furniture:	
1 room	\$780
2 rooms	\$1,000
3 rooms	\$1,250
4 rooms	\$1,475
5 rooms	\$1,790
6 rooms	\$2,065
7 rooms	\$2,380
8 rooms	\$2,690
Each additional room	\$285
Occupant does NOT Own Furniture:	
1 room	\$510
Each additional room	\$100

B. Actual Moving Expense (Professional Move)

If you wish to engage the services of a licensed commercial mover and have the Owner pay the bill, you may claim the ACTUAL cost of moving your personal property up to 50 miles. Your relocation agent will inform you of the number of competitive moving bids (if any) which may be required, and assist you in developing a "mover" scope of services for Owner approval.

4. REPLACEMENT HOUSING PAYMENT - TENANTS AND CERTAIN OTHERS

You may be eligible for a payment of up to \$5,250.00 to assist you in renting or purchasing a comparable replacement dwelling. In order to qualify, you must either be a tenant who has occupied the present dwelling for at least 90 days prior to the initiation of negotiations or an owner who has occupied the present dwelling between 90 and 180 days prior to the initiation of negotiations.

A. Rental Assistance. If you qualify, and **wish to rent** your replacement dwelling, your maximum rental assistance benefits will be based upon the difference over a forty-two (42) month period between the rent you must pay for a comparable replacement dwelling and the lesser of your current rent and estimated utilities or thirty percent (30%) of your gross monthly household income. You will be required to provide your relocation agent with monthly rent and household income verification prior to the determination of your eligibility for this payment.

- OR -

B. Down-payment Assistance. If you qualify and **wish to purchase** a home as a replacement dwelling, you can apply up to the total amount of your rental assistance payment towards the down-payment and non-recurring incidental expenses. Your relocation agent will clarify procedures necessary to apply for this payment.

Where a tenant is sharing a dwelling with an owner-occupant and paying the owner-occupant rent for the privilege, the tenant shall not be entitled to more than one-half of the rental assistance otherwise payable.

5. QUALIFICATION FOR, AND FILING OF, RELOCATION CLAIMS

To qualify for a Replacement Housing Payment, you must rent or purchase and occupy a comparable replacement unit **within one year from the following**:

- For a tenant, the date you move from the displacement dwelling.
- For an owner-occupant, the latter of:
 - a.** The date you receive final payment for the displacement dwelling, or, in the case of condemnation, the date the full amount of estimated just compensation is deposited in court; **or**
 - b.** The date you move from the displacement dwelling.

All claims for relocation benefits must be filed with the Owner **within eighteen (18) months** from the date on which you receive final payment for your property, or the date on which you move, whichever is later.

6. LAST RESORT HOUSING ASSISTANCE

If comparable replacement dwellings are not available when you are required to move, or if replacement housing is not available within the monetary limits described above, the Owner will provide Last Resort Housing assistance to enable you to rent or purchase a replacement dwelling on a timely basis. Last Resort Housing assistance is based on the individual circumstances of the displaced person. Your relocation agent will explain the process for determining whether or not you qualify for Last Resort assistance.

If you are a tenant, and you choose to purchase rather than rent a comparable replacement dwelling, the entire amount of your rental assistance and Last Resort eligibility must be applied toward the down-payment and eligible incidental expenses of the home you intend to purchase.

7. EVICTIONS

Any person, who occupies the real property and is not in unlawful occupancy, is presumed to be entitled to relocation benefits. Except for the causes of eviction set forth below, no person lawfully occupying property to be purchased by the Agency will be required to move without having been provided with at least 90 days written notice from the Agency. Eviction will be undertaken only in the event of one or more of the following reasons:

- Failure to pay rent; except in those cases where the failure to pay is due to the lessor's failure to keep the premises in habitable condition, is the result of harassment or retaliatory action or is the result of discontinuation or substantial interruption of services;
- Performance of dangerous illegal act in the unit;
- Material breach of the rental agreement and failure to correct breach within the legally prescribed notice period;
- Maintenance of a nuisance and failure to abate within a reasonable time following notice;
- Refusal to accept one of a reasonable number of offers of replacement dwellings; or
- The eviction is required by State or local law and cannot be prevented by reasonable efforts on the part of the public entity.

8. APPEAL PROCEDURES - GRIEVANCE

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

9. TAX STATUS OF RELOCATION BENEFITS

California Government Code Section 7269 indicates no relocation payment received shall be considered as income for the purposes of the Personal Income Tax Law, Part 10 (commencing with Section 17001) of Division 2 of the Revenue and Taxation Code, or the Bank and Corporation Tax law, Part 11 (commencing with Section 23001) of Division 2 of the Revenue and Taxation Code. Furthermore, federal regulations (49 CFR Part 24, Section 24.209) also indicate that no payment received under this part (Part 24) shall be considered as income for the purpose of the Internal Revenue Code of 1954, which has been redesignated as the Internal Revenue Code of 1986. No federal dollars are anticipated for this project. Therefore, federal regulations may not apply and the IRS may consider relocation payments as income. The preceding statement is not tendered as legal advice in regard to tax consequences, and displacees should consult with their own tax advisor or legal counsel to determine the current status of such payments.

(IRS Circular 230 disclosure: To ensure compliance with requirements imposed by the IRS, we inform you that any tax advice contained in this communication (including any attachments) was not intended or written to be used, and cannot be used, for the purpose of (i) avoiding tax-related penalties under the Internal Revenue Code or (ii) promoting marketing or recommending to another party any matters addressed herein)

10. NON-DISCRIMINATION AND FAIR HOUSING

No person shall on the grounds of race, color, national origin or sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under the Owner's relocation assistance program pursuant to Title VI of the Civil Rights Act of 1964, Title VIII of the Civil Rights Act of 1968, and other applicable state and federal anti-discrimination and fair housing laws. You may file a complaint if you believe you have been subjected to discrimination. For details contact the Owner.

11. ADDITIONAL INFORMATION AND ASSISTANCE AVAILABLE

Those responsible for providing you with relocation assistance hope to assist you in every way possible to minimize the hardships involved in relocating to a new home. Your cooperation will be helpful and greatly appreciated. If you have any questions at any time during the process, please do not hesitate to contact your relocation agent at OPC.

EXHIBIT D

PUBLIC COMMENTS & RESPONSES

The Relocation Plan and an Advisory Notice regarding the 30-day mandatory public review and comment period was provided to the two tenant households living on the Project site on August 12, 2025. No comments were received as of September 9, 2025. The review period concludes on September 11, 2025.