



DRAFT

FY 2023-2024

**CONSOLIDATED ANNUAL PERFORMANCE
EVALUTATION REPORT
(CAPER)**

September 11, 2024

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Attachments

Attachment 1: IDIS Program Reports

- **PR03 (Appendix 1): CDBG & CDBG-CV Activity Summary Report (GPR) for Program Year 2023**
- **PR26 (Appendix 2): CDBG Financial Summary Reports 2023**

Attachment 2: Map of CDBG-eligible Census Tract Block Groups

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Attachment 4: Public Notice and Summary of Public Comments

CR-05 - Goals and Outcomes

Progress the jurisdiction has made in carrying out its strategic plan and its action plan. 91.520(a)

This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.

The City of Lake Forest ("City") adopted its Fiscal Year ("FY") 2020-2024 Five-Year Consolidated Plan on June 16, 2020, which established objectives for the City's Community Development Block Grant ("CDBG") program in order to create a viable community by providing decent housing, a suitable living environment, and economic opportunities, principally for persons of low- and moderate-income. The objectives identified included the following:

1. Rehabilitate the City's existing single-family housing stock, including mobile homes
2. Conserve the existing supply of affordable housing
3. Provide supportive housing and services for the homeless and those at risk of becoming homeless
4. Provide needed community services and infrastructure improvements benefitting low- and moderate-income persons and those with special needs
5. Focus on expanding economic opportunities for low- and moderate-income residents.

During FY 2023-2024, the fourth year of the five-year cycle, the City carried out a variety of activities to address Consolidate Plan objectives, including the following:

- Assisted with the rehabilitation of 14 housing units owned by low- and moderate-income households
- Funded a variety of safety net public service grant programs to prevent homelessness and assist lower-income households – 2,900 Lake Forest residents were assisted with FY 2023-2024 funds
- Two capital projects were funded during the reporting period: ADA Ramps Phase 13 and Accessible Pedestrian Signals

In FY 2023-2024, the US Department of Housing and Urban Development ("HUD") awarded the City \$520,784 of CDBG funds. In addition, the City had prior-year unexpended funds (\$752,481.57) and received \$149,653.62 in program income generated from the repayment of housing rehabilitation loans. A total of \$1,422,919.19 of CDBG funds were available for expenditure in FY 2023-2024. These funds were allocated to public service grants, housing activities, paint grants, public facility improvements, and program administration as shown in Table 1 below.

Comparison of the proposed versus actual outcomes for each outcome measure submitted

with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee's program year goals.

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Economic Opportunities	Non-Housing Community Development	CDBG: \$	Businesses assisted	Businesses Assisted	50	0	0.00%	0	0	0.00%
Homeless Continuum of Care	Homeless	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	2,500	580	23.20%	1,368	580	42.40%
Homeless Continuum of Care	Homeless	CDBG: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	50	0	0.00%	0	0	0.00%
Homeless Continuum of Care	Homeless	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	30	0	0.00%	0	0	0.00%
Homeless Continuum of Care	Homeless	CDBG: \$	Overnight/Emergency Shelter/Transitional Housing Beds added	Beds	0	0	0.00%	0	0	0.00%
Homeless Continuum of Care	Homeless	CDBG: \$	Homelessness Prevention	Persons Assisted	250	580	232.00%	17	0	0.00%
Housing Preservation	Affordable Housing	CDBG: \$	Homeowner Housing Added	Household Housing Unit	0	0	0.00%	0	0	0.00%
Housing Preservation	Affordable Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	40	0	0.00%	11	14	127.27%

Infrastructure and Facility Improvements	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	7,500	5755	76.73%	100	5,755	5,755.00%
Program Administration	Administration	CDBG: \$	Other	Other	450	450	100.00%	95	101	106.32%
Public Social Services	Non-Homeless Special Needs Low & Moderate-income Households	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	8,000	1,525	19.06%	2,400	2,799	116.63%
Public Social Services	Non-Homeless Special Needs Low & Moderate-income Households	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	0	0	0.00%	0	0	0.00%

Table 1 - Accomplishments – Program Year & Strategic Plan to Date

Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.

As summarized above, the City focused CDBG funds on addressing Consolidated Plan priority needs during the reporting period. Consistent with the Plan, the City focused public service grant resources on safety net programs for lower-income households; the City allocated approximately 38% of CDBG funds for public services. FY 2023-2024 reporting period accomplishments for CDBG funds include the following:

- South County Outreach’s food bank program allowed lower-income households to focus limited financial resources on maintaining housing, thus preventing homelessness.
- Family Assistance Ministries provided food, rent, and utility assistance to lower-income households at risk of eviction and utility service shut-off. Program participants also benefitted from case management services.
- Families Forward provided transitional housing and rapid rehousing, including supportive services to homeless families with children.
- Camino Health Center provided reduced-cost medical and pediatric dental care services for lower-income households, including the uninsured and the homeless.
- Age Well provided case management services to assess homebound senior’s health and living situation, thus helping seniors remain healthy and housed and avoid costly institutionalization in managed care facilities.
- Alzheimer’s Orange County provided reduced-cost daycare services for seniors with Alzheimers, dementia, or disabilities.
- Fair Housing Council of Orange County provided fair housing outreach, education, and enforcement service for tenants and landlords.

The City’s Housing Rehabilitation Program helped preserve and improve the City’s existing stock of owner-occupied housing (including mobile homes) - 14 homeowners received housing rehab assistance during the reporting period. Typical improvements include installing energy-efficient windows, heating/ac systems, plumbing, roofs, flooring, and exterior painting. The City’s Neighborhood Pride Paint Program assisted four homeowners. As indicated above, the Office for the Coordination of Humanitarian Affairs (“OCHA”) provided rental assistance to 161 Lake Forest renter households, including seniors, disabled, homeless, and veteran households.

Two prior year public infrastructure/facility improvement projects were underway during the FY 2023-2024 report period: The Accessible Pedestrian Signal project and the ADA Ramps Phase 13 project that provided for the construction of ADA-compliant sidewalk curb ramps. These projects also experienced delays due to supply chain and staffing challenges. A summary of activities underway during FY 2023-2024 is provided in Attachment 1 - Appendix 1.

CR-10 - Racial and Ethnic composition of families assisted

Describe the families assisted (including the racial and ethnic status of families assisted).

91.520(a)

	CDBG
White	3,106
Black or African American	76
Asian	300
American Indian or American Native	28
Native Hawaiian or Other Pacific Islander	16
Total	3,526
Hispanic	1,718
Not Hispanic	1,808

Table 2 – Table of assistance to racial and ethnic populations by source of funds

Narrative

According to the U.S. Census Bureau, most Lake Forest residents are racially White – 63.3% (2020 American Community Survey 5-Year Estimates). This same data source reports that 18.1% of City residents are Asian, and 25.6% of the City’s population is Hispanic/Latino – these are the City’s most prominent minority populations.

Based on the data from Table 2, 88% of CDBG program participants were White; nearly half of these individuals reported to be ethnically Hispanic/Latino (48.7%). A closer examination of the accomplishment data from individual activities provides added insight. Among homeless and safety net programs such as housing, food, and medical services, most clients served are lower-income Hispanic/Latino households. This data indicates that these households may be economically unstable and therefore seek assistance to stabilize their living situation.

Accomplishment data provided for CDBG and CDBG-CV-funded activities also indicates that most program participants are extremely low-income Lake Forest residents (i.e., individuals with a household income equal to or less than 30% of the County median income). During the FY 2023-24 reporting period, 55.3% of CDBG-funded program beneficiaries were extremely low-income.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	\$520,784.00	\$795,140.57

Table 3 - Resources Made Available

Narrative

According to the City’s 2023-2024 Annual Action Plan, the City anticipated utilizing \$520,784 in CDBG program resources to address community needs during the reporting period; however, the City received \$149,653.62 in program income during the reporting period. As reported in Table 3, the City expended \$795,140.57 in CDBG funds, including program income, during the FY 2023-2024 reporting period.

IDIS Program Report PR26 (Attachment 1 - Appendix 2) provides a detailed summary of CDBG and CDBG-CV expenditures for the reporting period.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
CDBG TARGET AREAS	0	41	Park and Sidewalk Projects
Citywide	100	59	Citywide

Table 4 – Identify the geographic distribution and location of investments

Narrative

As reported in Table 4, the City utilized 93% of CDBG funds to address the needs of lower-income Lake Forest residents on a citywide basis. A small percentage of CDBG funds was spent on infrastructure projects which are located within the City’s CDBG Target Area. Attachment 2 provides a map of the City’s CDBG Target Areas. All CDBG-CV funds were spent on a citywide basis.

Leveraging

Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.

The City of Lake Forest made every effort to leverage CDBG funds to the greatest extent possible. Unlike prior years, no additional resources were used to leverage CDBG funds during the reporting period. There is no match requirement for the CDBG (and CDBG-CV) program.

CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	0	0
Number of Non-Homeless households to be provided affordable housing units	11	14
Number of Special-Needs households to be provided affordable housing units	0	0
Total	11	14

Table 5 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	0	0
Number of households supported through The Production of New Units	0	0
Number of households supported through Rehab of Existing Units	11	14
Number of households supported through Acquisition of Existing Units	0	0
Total	11	14

Table 6 – Number of Households Supported

Discuss the difference between goals and outcomes and problems encountered in meeting these goals.

Despite the challenges of the COVID-19 pandemic, the City exceeded planned housing rehabilitation program goals for the reporting period. The FY 2023-2024 Annual Action Plan established a one year goal to rehabilitate 11 owner-occupied housing units, program staff assisted with rehabilitating 14 units. OCHA assisted fewer Lake Forest households with rental assistance than anticipated. The City expected OCHA would assist 200 households during the reporting period – 169 households were assisted. (Note: The number of households assisted by OCHA is based on several factors out of the City's control.)

Discuss how these outcomes will impact future annual action plans.

Even though program staff exceeded planned housing rehabilitation goals during the report period, the program may face future challenges:

1. Increase in mortgage interest rates and home sales prices:

- The City received less Revolving Loan income (i.e., program income) in FY 2023-2024 compared to recent years. Revolving Loan revenue is generated by the repayment of prior CDBG funded housing rehabilitation loans. A decrease in this funding source and anticipated reductions in future CDBG allocations may reduce the amount of future resources supporting housing rehabilitation activity.
- Recent press reports indicate that rising mortgage interest rates and home prices have led many homeowners to choose to rehabilitate their existing homes versus upgrading to a new home. This scenario may increase demand for limited CDBG funds allocated for housing rehabilitation.

2. Contractor capacity and supply chain issues:

- The COVID-19 pandemic and other global events have stressed supply chain issues across multiple industries. Contractors have reported challenges in obtaining materials such as lumber, concrete, and fixtures, resulting in delays in the beginning and completion of rehabilitation projects. Contractors also reported sharp increases in the price of materials.
- Housing Rehabilitation Program staff reports that contractors are very busy; subsequently, contractors are not responding to program bid solicitations or requesting additional time to begin and complete projects.
- In response to the cost of rehabilitation, the City will consider increasing the current maximum housing rehabilitation loan amount from \$30,000 to \$50,000. It is important to note that an increase in the maximum loan may limit the number of future program participants if sufficient funding is not available.

Approximately 5% of the City's housing stock are mobile homes; however, many coach owners are lower-income residents with limited sources of income (e.g., social security, disability, pension). This cohort of homeowners will likely continue to seek City assistance to rehabilitate their homes (e.g., 9 of the 14 housing units rehabilitated during the FY 2023-2024 reporting period are mobile homes). The number of contractors specializing in mobile home rehabilitation is limited. In response to this challenge, the City will continue to appeal to new contractors to participate in the program, including efforts to attract additional minority and women contractors.

Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity.

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	3	0
Low-income	4	0
Moderate-income	7	0
Total	14	0

Table 7 – Number of Households Served

Narrative Information

Table 7 provides information regarding the households that received housing rehabilitation assistance during FY 2023-2024. OCHA reports that 169 Lake Forest very low-income and extremely low-income renter households received rental assistance during the FY 2023-2024 reporting period. The City is not a recipient of HOME funds.

CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)

Evaluate the jurisdiction's progress in meeting its specific objectives for reducing and ending homelessness through:

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

During FY 2023-2024 Lake Forest did not allocate CDBG funds for homeless outreach. Mercy House provided outreach and engagement services to chronic homeless with an Orange County Sheriff Homeless Liaison Officer's support. Mercy House was funded with non-HUD resources.

Addressing the emergency shelter and transitional housing needs of homeless persons

During the FY 2023-2024 reporting period, the City did not fund emergency shelter or transitional housing programs.

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

The City's homeless strategy delineated in the Consolidated Plan calls for providing safety net services that help prevent individuals and families from becoming homeless. To this end, during the FY 2023-2024 reporting period, CDBG funding was allocated to Families Forward, Family Assistance Ministries, and South County Outreach to assist households at risk of becoming homeless. Cumulatively, these three agencies provided rent, utility, and food assistance to 80 lower-income Lake Forest residents during the reporting period. An additional 116 lower-income Lake Forest residents were assisted with rent/utility assistance during the reporting period with FY 2023-2024 Super-funded CDBG funds. The City also allocated CDBG-CV funds to three agencies, which provided rent, utility, and food assistance to households impacted by the COVID-19 pandemic. Cumulatively, these agencies assisted 85 individuals during the reporting period.

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

As recently as FY 2023-2024, the City utilized local funds (former redevelopment resources) to acquire residential properties for permanent affordable housing. Families Forward operates these units as permanent, affordable housing for lower-income households, and these units will remain affordable for lower-income households for a minimum of 55 years. The City did not undertake a similar activity during the FY 2023-2024 reporting period; however, OCHA reports that 169 Lake Forest households were assisted with rental subsidies during the reporting period. This figure includes five disabled Lake Forest homeless households (benefitting from Continuum of Care Program Permanent Supportive Housing Certificates) and 18 homeless, disabled veteran households that benefitted from Veterans Affairs Supportive Housing (VASH) vouchers.

CR-30 - Public Housing 91.220(h); 91.320(j)

Actions taken to address the needs of public housing

The City of Lake Forest does not own or manage public housing.

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

Not applicable.

Actions taken to provide assistance to troubled PHAs

Not applicable.

CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)

Actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)

The FY 2023-2024 Annual Action Plan indicated that the City would address affordable housing barriers by providing resources to assist social service agencies that provide fair housing counseling and housing referral services for low- and moderate-income and special needs populations. During FY 2023-2024, the City provided funds to the Fair Housing Council of Orange County (“FHCO”). Services provided by FHCO included outreach, education, and fair housing enforcement. A total of 95 households were assisted during the reporting period addressing 284 issues and disputes related to rental agreements, notices, security deposits, unit habitability, and more. FHCO reports one housing discrimination complaint was received from a Lake Forest resident during the year; however, the issue was resolved through counseling.

The Consolidated Plan and Annual Action Plan also indicated barriers to affordable housing development would be addressed by considering ways to reduce development fees and expedite the entitlement review process. As previously outlined, the City has provided various subsidies to create new affordable housing opportunities for lower-income households. No affordable housing development was completed during FY 2023-2024.

Actions taken to address obstacles to meeting underserved needs. 91.220(k); 91.320(j)

The City recognizes that special needs populations face challenges due to low income and their particular life situation. Special needs populations (e.g., the disabled and homeless) often require housing accommodations and supportive services. The City prioritizes supportive services and housing for special needs populations. During FY 2023-2024, the City funded several public service agencies that provide a social safety net to help at-risk households. These services include free or reduced-cost food, healthcare, and daycare services. Alzheimer’s Orange County and Vocational Visions provided services to 45 disabled Lake Forest residents. As outlined in section CR-25 - Homeless and Other Special Needs, several nonprofit partners provided supportive services to the homeless and those at risk of becoming homeless.

Actions taken to reduce lead-based paint hazards. 91.220(k); 91.320(j)

The Residential Lead-Based Paint (LBP) Hazard Reduction Act of 1992 (Title X) changed the federal approach to addressing LBP by emphasizing preventing childhood lead poisoning through housing-based strategies. The City considers lead-based paint hazard reduction as an eligible activity in the City’s Housing Rehabilitation Programs. All application packets for the City’s Housing Rehabilitation Programs include a notice to educate residents about the health dangers of lead and encourage screening children for elevated blood-lead levels. Additionally, before federal funds are used for housing rehabilitation, all units are screened for lead-based paint hazards. Housing units identified with lead-based paint are treated, so

paint hazards are abated per federal requirements. The use of lead-based paint has been prohibited since 1978. All housing units rehabilitated during FY 2023-2024 met an exemption allowed under HUD lead-based paint program regulations.

Actions taken to reduce the number of poverty-level families. 91.220(k); 91.320(j)

According to data from the U.S. Census Bureau (2021: American Community Survey 5-Year Estimates – Table S1701), approximately 10.4% of Lake Forest residents have incomes below poverty. Specifically, 14.6% of City residents aged 65 and older and 7.1% of children under 18 have a household income below poverty. The Consolidated Plan and Annual Action Plan indicated that the City would support social services and housing activities for households living below the poverty line. During the FY 2023-2024 reporting period, low-income seniors were assisted with CDBG-funded in-home support and case management services; these services were provided for free. The City also provided funding to Alzheimer’s Orange County, which provided daycare services for seniors with Alzheimers, dementia, or disabilities. The program offers various medical, therapeutic, and social services for low-income seniors. Recognizing that poverty-level households may need assistance affording food and health care, the City also provided financial assistance to nonprofits that provide primary health care and food bank services. Service providers also offered clients career counseling and computer training to help them develop the skills and knowledge necessary for today’s workplace. In response to the economic impacts of the COVID-19 pandemic, the City provided significant CDBG-CV resources to help lower-income households maintain housing and utility services. According to FY 2023-2024 program accomplishment data, 81.2% of CDBG-CV-funded program beneficiaries are extremely low-income individuals.

Actions taken to develop institutional structure. 91.220(k); 91.320(j)

During FY 2023-2024, the City continued efforts to eliminate institutional gaps and enhance program coordination with all community segments. For example, the City partnered with nonprofit entities to deliver public services. City departments also continued to collaborate to evaluate projects funded in whole or in part with CDBG funds that address priority needs. The City assisted OCHA by participating in the Cities Advisory Committee – a quarterly meeting of municipal and OCHA staff to discuss federal rental housing assistance and regional housing issues. The City also provided critical information and support for the regional Continuum of Care (CoC) as it prepares the County’s CoC Homeless Assistance grant application for HUD consideration. The City also supported efforts to develop the County’s Ten-Year Plan to end chronic homelessness and a regional discharge plan. Finally, the City coordinated with other Orange County grantees to prepare the 2020-2024 Orange County Analysis of Impediments to Fair Housing for a new five-year cycle.

Actions taken to enhance coordination between public and private housing and social service agencies. 91.220(k); 91.320(j)

As indicated above, the City participated in regional coordination of services by participating in the quarterly Cities Advisory Committee held by OCHA to discuss federal rental housing assistance and as a member of the Orange County CoC Forum. The City has partnered with local nonprofit housing providers to expand affordable housing opportunities for lower-income households in the past years.

Identify actions taken to overcome the effects of any impediments identified in the jurisdictions analysis of impediments to fair housing choice. 91.520(a)

Consolidated Plan regulations require CDBG recipients to (1) examine and attempt to alleviate housing discrimination within their jurisdiction; (2) promote fair housing choice for all persons; (3) provide opportunities for all persons to reside in any given housing development, regardless of race, color, religion, sex, disability, familial status, or national origin; (4) promote housing that is accessible to and usable by persons with disabilities; and (5) comply with the non-discrimination requirements of the Fair Housing Act. HUD encourages jurisdictions to consult with one another and initiate countywide fair housing planning. The Analysis of Impediments to Fair Housing Choice (AI) is the primary document for this purpose. Consistent with HUD's directive, the City partnered with 19 Orange County jurisdictions to prepare a countywide AI. The AI provides an overview of fair housing impediments throughout Orange County, including Lake Forest. The AI also includes an action plan to address regional and local fair housing impediments. Attachment 3 summarizes the steps the City and the Fair Housing Council of Orange County took to address fair housing impediments during FY 2023-2024.

CR-40 - Monitoring 91.220 and 91.230

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

The City's CDBG monitoring program is designed to provide program staff with information necessary to ensure that sub-recipients are carrying out individual activities as described in their contracts, and ensure sub-recipients use appropriate accounting and record-keeping methods as it relates to the use of CDBG funds. Program policies ensure sub-recipients receive training regarding CDBG grant management, including the following topics: 1) review CDBG program goals, objectives, and sub-recipient obligations; 2) review the content of the sub-recipient agreements; and 3) review regulations related to the CDBG program that impact sub-recipients and the implementation of their programs. On-site monitoring of sub-recipients is conducted biennially unless a program or administrative issues are identified, or the grant recipient is new to CDBG. The City conducted on-site monitoring during the FY 2023-24 reporting period. In general, sub-recipients are complying with program requirements. Some programs did not meet planned performance goals. On-site monitoring will be scheduled for FY 2024-25. During the reporting period, program staff worked closely with City departments to ensure CDBG program regulations and other federal requirements were implemented. City departments and public service grant sub-recipients submitted accomplishment reports. Sub-recipients are required to provide documentation to support CDBG reimbursement requests. The City also made every effort to comply with all CDBG and Consolidated Plan regulations. The City's Citizen Participation Plan ensures that community input is considered before submitting a substantial amendment or an annual update to HUD. It also allows residents to review and comment on yearly performance. Construction, professional service, and sub-recipient agreements have been prepared to ensure compliance with applicable federal regulations. Additionally, the City has implemented an open procurement process that encourages bidding from minority and women-owned businesses.

Citizen Participation Plan 91.105(d); 91.115(d)

Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.

The City published a notice in the Saddleback Valley News on September 5, 2024, announcing a 15-day public comment period and City Council meeting to encourage resident participation. The FY 2023-2024 CAPER was available for public review and comment from September 3, 2024, through September 18, 2024, online and at Lake Forest City Hall, located at 100 Civic Center. The Lake Forest City Council accepted additional public comments at its September 17, 2024, meeting. A copy of this notice and a summary of public comments is provided in Attachment 4.

CR-45 - CDBG 91.520(c)

Specify the nature of, and reasons for, any changes in the jurisdiction's program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.

No FY 2023-2024 Annual Action Plan changes were undertaken during the reporting period.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?

No

[BEDI grantees] Describe accomplishments and program outcomes during the last year.

CR-58 – Section 3

Identify the number of individuals assisted and the types of assistance provided

Total Labor Hours	CDBG	HOME	ESG	HOPWA	HTF
Total Number of Activities	0	0	0	0	0
Total Labor Hours					
Total Section 3 Worker Hours					
Total Targeted Section 3 Worker Hours					

Table 8 – Total Labor Hours

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers					
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.					
Technical assistance to help Section 3 business concerns understand and bid on contracts.					
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.					
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.					
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents to obtain financial literacy training and/or coaching.					
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.					
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.					

Table 9 – Qualitative Efforts - Number of Activities by Program

Narrative



U.S. Department of Housing and Urban Development
 Office of Community Planning and Development
 Integrated Disbursement and Information System
 CDBG Activity Summary Report (GPR) for Program Year 2023
 LAKE FOREST

Date: 05-Sep-2024
 Time: 15:54
 Page: 1

PGM Year: 1994
Project: 0004 - CONVERTED HOPWA ACTIVITIES
IDIS Activity: 2 - CDBG COMMITTED FUNDS ADJUSTMENT
Status: Open
Location: ,
Objective:
Outcome:
Matrix Code: General Program Administration (21A) **National Objective:**

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 01/01/0001

Description:

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$259,141.28	\$0.00	\$0.00
		1994	B94MC060584		\$0.00	\$371,000.00
		1995	B95MC060584		\$0.00	\$172,268.28
		2006	B06MC060584		\$0.00	(\$284,127.00)
	PI			\$284,127.00	\$0.00	\$284,127.00
Total	Total			\$543,268.28	\$0.00	\$543,268.28

Proposed Accomplishments

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:					0	0		
Black/African American:					0	0		
Asian:					0	0		
American Indian/Alaskan Native:					0	0		
Native Hawaiian/Other Pacific Islander:					0	0		
American Indian/Alaskan Native & White:					0	0		
Asian White:					0	0		
Black/African American & White:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		
Other multi-racial:					0	0		
Asian/Pacific Islander:					0	0		



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Hispanic:					0	0
Total:		0	0	0	0	0
Female-headed Households:					0	

<i>Income Category:</i>	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

Annual Accomplishments

No data returned for this view. This might be because the applied filter excludes all data.



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PGM Year: 2019
Project: 0002 - El Toro Park Improvements
IDIS Activity: 465 - El Toro Park Improvements

Status: Completed 4/24/2024 3:05:27 PM Objective: Create suitable living environments
 Location: 24031 Larkwood Ln Lake Forest, CA 92630-5100 Outcome: Sustainability
 Matrix Code: Parks, Recreational Facilities (03F) National Objective: LMA

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 10/30/2019

Description:
 CDBG funds for the installation of park improvements.

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2019	B19MC060584	\$91,470.00	\$18,036.60	\$91,470.00
		2021	B21MC060584	\$16,463.40	\$16,463.40	\$16,463.40
Total	Total			\$107,933.40	\$34,500.00	\$107,933.40

Proposed Accomplishments

Public Facilities : 1
 Total Population in Service Area: 5,755
 Census Tract Percent Low / Mod: 67.33

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2019	CDBG funds allocated for park improvements. In May 2020, \$39,000 (2019 funds) of project funds were reallocated to activities to support CDBG-CV funded activities. Improvements including upgrading electrical distribution cabinet, park lighting, and installation of security gates at restrooms. Project design and bidding will take place in October/November 2020. It is anticipated that construction will begin in December 2020 and completed in March 2021.	
2020	Due to the COVID-19 pandemic, the City reallocated a portion of project funds (\$39,000) to support public services and business assistance grants that addressed local impacts of the coronavirus. The reallocation of project funds resulted in a delay as project management staff prioritized park improvements to fit reduced funding. Additionally, the project was delayed due to widespread shortage of labor and products and materials. During the reporting period city staff prepared and circulated bids for components of the project. The project will most likely be underway during the FY 21-22 reporting period.	
2021	Pandemic-related delays continued to impact the project - primarily delays in sourcing materials for the project. Tennis courts have been resurfaced. Improvements to be completed include installation of new tennis court lights, upgrade to the electrical distribution cabinet, and installation of security gates at restrooms. It is anticipated that these improvements will be completed in 6 to 8 months.	



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Years	Accomplishment Narrative	# Benefitting
2022	The project has experienced several delays due to material shortages, shortages of skilled labor for certain trades, and a long lead-time in securing materials. However, several planned park improvements have been completed including tennis court repairs and lighting, and restroom lighting and security gates. Delivery of a new electrical cabinet has been delayed. It is anticipated the project will be completed during the FY 23-24 report period.	
2023	March 2024 - the city allocated an additional \$16,463.40 (2021 funds) to this activity from Act #506. During the FY 23-24 reporting period, the new electrical cabinet was installed. The project is complete.	



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PGM Year: 2019
Project: 0014 - Accessible Pedestrian Signals (APS)
IDIS Activity: 477 - Accessible Pedestrian Signals (APS) Installation

Status: Completed 4/24/2024 3:03:20 PM Objective: Create suitable living environments
 Location: 100 Civic Center Dr Lake Forest, CA 92630-9202 Outcome: Availability/accessibility
 Matrix Code: Sidewalks (03L) National Objective: LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 02/22/2020

Description:
 Installation of audible pedestrian signals at various intersections

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2018	B18MC060584	\$36,000.00	\$17,512.69	\$36,000.00
		2019	B19MC060584	\$10,000.00	\$10,000.00	\$10,000.00
		2021	B21MC060584	\$25,826.31	\$25,826.31	\$25,826.31
Total	Total			\$71,826.31	\$53,339.00	\$71,826.31

Proposed Accomplishments

People (General) : 300

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	1,508	524
Black/African American:	0	0	0	0	0	0	38	0
Asian:	0	0	0	0	0	0	155	0
American Indian/Alaskan Native:	0	0	0	0	0	0	21	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	198	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0



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Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	1,920	524

Female-headed Households: 0 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	0
Low Mod	0	0	0	0
Moderate	0	0	0	1,920
Non Low Moderate	0	0	0	0
Total	0	0	0	1,920
Percent Low/Mod				100.0%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2019	CDBG funds allocated as part of a Substantial Amendment to add Accessible Pedestrian Signals at two intersections. Project design started in March 2020 and completed in April 2020; however, due to COVID-19 Stay-at-Home orders, the project is yet to be awarded. It is anticipated construction will begin and be completed during FY 2020-21.	
2020	The original project consisted of APS systems at the intersection of El Toro and Muirlands and Rockfield and Ridge Route. In addition, an ADA ramp was planned to be upgraded at the El Toro and Muirlands intersection. These improvements comprised the \$36,000 identified in the program. The City bid the improvements in one package, but received high bids due to the different nature of the APS, electrical work, versus the ADA ramp construction. Due to high bids, the City re-bid the project separating the two components. The APS system was completed by Bear Electrical Solutions, Inc. in the amount of \$17,892.50. The ADA ramp was deferred to be complete as part of other ADA ramp improvements to realize better economies of scale. The Activity is complete. The unexpended balance of \$27,512.69 (\$17,512.69 FY 2018 funds plus \$10,000 FY 2019 funds) will be reprogrammed.	
2021	The APS system was completed by Bear Electrical Solutions, Inc. in the amount of \$17,892.50. The ADA ramp was deferred to be complete as part of other ADA ramp improvements to realize better economies of scale. The Activity is complete. The unexpended balance of \$27,512.69 (\$17,512.69 FY 2018 funds plus \$10,000 FY 2019 funds) may be reprogrammed. According to HUD Exchange data, 902 Lake Forest residents with a disability reside in the project area Census Tract (CT: 052411). According to the U.S. Census, 693 Lake Forest residents, age 18 plus, have hearing, vision and ambulatory difficulties.	
2022	On Sept 20, 2022, the City Council allocated an additional \$20,565 for this activity. The project continued to experience delays due to long lead-times to receive required equipment. In May 2023, a notice to proceed to purchase equipment only, was issued. Equipment is scheduled to be shipped in August 2023. It is anticipated equipment will be delivered in late August and construction will be completed by October 2023.	
2023	March 2023- the City allocated an additional \$9,999.31 (2021 funds) from Act #506). On 3/14/24, allocated funding was reduced by \$7,132 (2021 funds) and allocated to ADA Ramps Phase 13 (#506). The project is complete. Per HUD data, 1,920 Lake Forest residents with a disability may benefit from the project (CTs 321.14, 524.0 and 545.11).	



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PGM Year: 2020
Project: 0023 - CV - Program Administration
IDIS Activity: 494 - CV - Program Administration

Status: Open
Location: ,
Objective:
Outcome:
Matrix Code: General Program Administration (21A) **National Objective:**

Activity to prevent, prepare for, and respond to Coronavirus: Yes

Initial Funding Date: 11/24/2020

Description:
 CDBG-CV program oversight and coordination

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2020	B20MW060584	\$50,114.00	\$4,422.61	\$50,114.00
Total	Total			\$50,114.00	\$4,422.61	\$50,114.00

Proposed Accomplishments

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:					0	0		
Black/African American:					0	0		
Asian:					0	0		
American Indian/Alaskan Native:					0	0		
Native Hawaiian/Other Pacific Islander:					0	0		
American Indian/Alaskan Native & White:					0	0		
Asian White:					0	0		
Black/African American & White:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		
Other multi-racial:					0	0		
Asian/Pacific Islander:					0	0		
Hispanic:					0	0		
Total:	0	0	0	0	0	0	0	0

Female-headed Households: 0



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Income Category:

	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

Annual Accomplishments

No data returned for this view. This might be because the applied filter excludes all data.



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PGM Year: 2021
Project: 0012 - ADA Sidewalk Curb Ramps
IDIS Activity: 506 - ADA Sidewalk Curb Ramps Phase 13
Status: Open
Location: 100 Civic Center Dr Lake Forest, CA 92630-9202
Objective: Create suitable living environments
Outcome: Availability/accessibility
Matrix Code: Sidewalks (03L) **National Objective:** LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 01/05/2022

Description:

Installation of sidewalk curb ramps that comply with current ADA regulations

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2019	B19MC060584	\$100,587.26	\$44,662.18	\$100,587.26
		2020	B20MC060584	\$72,761.75	\$72,761.75	\$72,761.75
		2021	B21MC060584	\$7,327.37	\$7,327.37	\$7,327.37
		2023	B23MC060584	\$6,000.00	\$5,051.70	\$5,051.70
Total	Total			\$186,676.38	\$129,803.00	\$185,728.08

Proposed Accomplishments

People (General) : 1,822

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	0	0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0



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Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	0	0
Female-headed Households:	0		0		0			

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	0
Low Mod	0	0	0	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	0
Percent Low/Mod				

Annual Accomplishments

Years	Accomplishment Narrative	# Benefiting
2021	CDBG funds will be used to reconstruct existing sidewalk curb ramps to comply with recent ADA requirements. The City encountered delays in starting the project due to pandemic-related staffing challenges. To take advantage of economy of scales, This phase of the City's ADA sidewalk curb ramp program will be combined with the City's FY 22-23 project. Design and engineering was initiated in June 2022. It is anticipated the project will go to bid in January 2023, with construction to begin in April 2023 and completed in June 2023.	
2022	The project consists of re-constructing existing sidewalk ramps to comply with recent CA Building Code requirements to comply with ADA regulations. The project was initially advertised in December 2022; however, proposals were much higher than initial engineer project estimates. In February 2023, the City Council rejection of bids and authorized the re-advertisement of the project with few locations. New bids were received and opened in April 2023. It is anticipated the construction contract will be awarded and construction will begin during the 2nd Qtr. of FY 23-24.	
2023	March 2024 - the city reduced funding for this activity by \$27,763.30 (2021 grant funds). Reprogrammed funds were reallocated to 3 activities - #465 (\$16,463.40), #477 (\$9,999.31), & #528 (\$1,300.59). On 3/14/24, \$7,132 in 2021 funds was allocated to this activity from ADA APS (#477) and \$6,000 in uncommitted funds (2023 funds)	



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PGM Year: 2020
Project: 0020 - CV-Public Services
IDIS Activity: 508 - CV - Mercy House - COVID Street Outreach

Status: Canceled 7/24/2023 12:00:00 AM
Location: 100 Civic Center Dr Citywide Lake Forest, CA 92630-9202
Objective: Create suitable living environments
Outcome: Availability/accessibility
Matrix Code: Operating Costs of Homeless/AIDS Patients Programs (03T)
National Objective: LMC

Activity to prevent, prepare for, and respond to Coronavirus: Yes

Initial Funding Date: 06/20/2022

Description:
 CDBG-CV funds to support homeless street outreach services with the goal to prevent the spread of COVID-19 among the homeless.

Financing
 No data returned for this view. This might be because the applied filter excludes all data.

Proposed Accomplishments

People (General) : 1

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0		0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0



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Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	0	0

Female-headed Households: 0 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	0
Low Mod	0	0	0	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	0

Percent Low/Mod

Annual Accomplishments

Years	Accomplishment Narrative	# Benefiting
2021	Reallocated CDBG-CV funds were committed to this activity in April 2022. Contract for use of these funds will be effective July 1, 2022. No activity to report for the FY 21-22 report period.	
2022	CDBG-CV funds were allocated to assist with homeless outreach services. Mercy House encountered issues submitted adequate documentation regarding use of funds. The City identified an alternate funding source for the program; therefore, this activity was cancelled in June 2023. \$40,000 in CDBG-CV funds will be reallocated to Act # 511.	



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PGM Year: 2020
Project: 0024 - CDBG-CV Public Facility Improvements
IDIS Activity: 511 - CV Public Facility Improvements - Senior Center Patio Cover
Status: Open **Objective:** Create suitable living environments
Location: 100 Civic Center Dr Citywide Lake Forest, CA 92630-9202 **Outcome:** Availability/accessibility
Matrix Code: Senior Centers (03A) **National Objective:** LMC

Activity to prevent, prepare for, and respond to Coronavirus: Yes

Initial Funding Date: 06/20/2022

Description:
 Public facility improvements that respond to and prevent the spread of COVID-19 at the Senior Center. Improvements include construct a patio cover to create an exterior recreation and activity area that will provide adequate spacing to help prevent the spread of COVID-19 among seniors.

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2020	B20MW060584	\$422,503.98	\$380,371.32	\$403,278.82
		2023	B23MC060584	\$90,600.00	\$90,600.00	\$90,600.00
Total	Total			\$513,103.98	\$470,971.32	\$493,878.82

Proposed Accomplishments

Public Facilities : 1

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0		0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0



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Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	0	0

Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	0
Low Mod	0	0	0	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	0

Percent Low/Mod

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2021	Reallocated CDBG-CV funds were allocated to this activity in April 2022. The project is in the early stages of design. There is no accomplishment data to report for the FY 21-22 report period.	
2022	Project design and engineering were started in Dec 2022 and completed in Mar 2023. Bids were received in April 2023. In June 2023, the city administration reallocated \$72,503.98 in CDBG-CV funds to the project (\$26,610.12 - Sr Center PPE, \$5,893.86 Sr Center Prepackaged Food & \$40,000 Mercy House COVID Homeless Outreach). A construction contract was awarded in July 2023. It is anticipated it will take 3 to 4 months to complete the project during the FY 23-24 report period.	
2023	Project construction was initiated during the FY 23-24 reporting period. On 4-25-24, \$90,600 in CDBG funding (2023 EN funds) was reallocated to this activity from Activity #511 (Housing Rehab Loans)	



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Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	0	0

Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	0
Low Mod	0	0	0	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	0

Percent Low/Mod

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2022	CDBG funds allocated to support the acquisition of housing unit(s) by a local nonprofit affordable housing provider. In January 2023, the City issued a NOFA. In April 2023, the City Council/Housing Authority authorized staff to negotiate with Families Forward, and in June 2023, the City Council approved an increase in non-CDBG funds allocated to the project from \$1.2 million to \$1.4 million. The City is currently negotiating a final agreement with Families Forward. In the interim, Families Forward will continue to seek a suitable building to purchase. The project will likely be completed during the FY 23-24 report period.	
2023	on 6/24/24, the City approved reallocating \$33,000 in 2023 from ADA Ramps Phase 14 (#528). HUD has approved the city's proposed acquisition method. It is anticipated the City Council will vote to approve the acquisition in July 2024.	



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PGM Year: 2022
Project: 0014 - ADA Sidewalk Curb Ramps Phase 14
IDIS Activity: 528 - ADA Sidewalk Curb Ramps Phase 14
Status: Open
Location: 100 Civic Center Dr Lake Forest, CA 92630-9202
Objective: Create suitable living environments
Outcome: Availability/accessibility
Matrix Code: Sidewalks (03L) **National Objective:** LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 10/28/2022

Description:

Installation of sidewalk curb ramps that comply with current ADA regulations

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2020	B20MC060584	\$6,062.50	\$0.00	\$6,062.50
		2021	B21MC060584	\$77,763.87	\$46,706.18	\$77,763.87
		2022	B22MC060584	\$60,482.09	\$60,482.09	\$60,482.09
		2023	B23MC060584	\$9,066.13	\$2,777.14	\$2,777.14
Total	Total			\$153,374.59	\$109,965.41	\$147,085.60

Proposed Accomplishments

People (General) : 2,633

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0		0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0



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Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	0	0

Female-headed Households: 0 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	0
Low Mod	0	0	0	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	0

Percent Low/Mod

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2022	CDBG funds will be used to reconstruct existing sidewalk curb ramps to comply with recent changes to the CA Building Code and ADA regulations. Due to the increase in the cost to construct new ramps, a portion of funds (\$_____) has been allocated to ADA Ramps FY 21-22 ADA Ramp project (#506). Funds expended during FY 22-23 were used for project design. Additional CDBG funds for construction will be available via FY 23-24 funding.	
2023	On 7-13-23, \$6062.50 in an over-expenditure from Act #507 (2020 funds) was moved to this activity. An additional \$138,669 in CDBG funding was allocated to the project as part of the FY 23-24 Annual Action Plan. In March 2024, an additional \$1,300.59 (2021 funds) from Act # 506 was allocated to the project. On 6/24/24, the City authorized reallocating \$33,000 (2023 funds) to Act #518 to support the acquisition of affordable housing.	



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PGM Year: 2023
Project: 0001 - CDBG Administration
IDIS Activity: 530 - CDBG Administration
Status: Completed 8/29/2024 5:01:58 PM
Location: ,
Objective:
Outcome:
Matrix Code: General Program Administration (21A) **National Objective:**

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:
 CDBG program oversight and coordination

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$70,885.54	\$70,885.54	\$70,885.54
Total	Total			\$70,885.54	\$70,885.54	\$70,885.54

Proposed Accomplishments

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:					0	0		
Black/African American:					0	0		
Asian:					0	0		
American Indian/Alaskan Native:					0	0		
Native Hawaiian/Other Pacific Islander:					0	0		
American Indian/Alaskan Native & White:					0	0		
Asian White:					0	0		
Black/African American & White:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		
Other multi-racial:					0	0		
Asian/Pacific Islander:					0	0		
Hispanic:					0	0		
Total:	0	0	0	0	0	0	0	0

Female-headed Households:

0



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Income Category:

	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

Annual Accomplishments

No data returned for this view. This might be because the applied filter excludes all data.



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PGM Year: 2023
Project: 0002 - Housing Rehabilitation Loans
IDIS Activity: 531 - Housing Rehabilitation Loans

Status: Open Objective: Provide decent affordable housing
 Location: 100 Civic Center Dr Lake Forest, CA 92630-9202 Outcome: Affordability
 Matrix Code: Rehab; Single-Unit Residential (14A) National Objective: LMH

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:

Loans to rehabilitate owner-occupied housing units funded with entitlement funds and program income received during the year

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$74,400.00	\$59,236.53	\$59,236.53
	RL			\$133,938.62	\$133,938.62	\$133,938.62
Total	Total			\$208,338.62	\$193,175.15	\$193,175.15

Proposed Accomplishments

Housing Units : 6

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	6	3	0	0	6	3	0	0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	1	0	0	0	1	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	1	0	0	0	1	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0



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Total:	8	3	0	0	8	3	0	0
Female-headed Households:	3		0		3			

Income Category:

	Owner	Renter	Total	Person
Extremely Low	1	0	1	0
Low Mod	2	0	2	0
Moderate	5	0	5	0
Non Low Moderate	0	0	0	0
Total	8	0	8	0
Percent Low/Mod	100.0%		100.0%	

Annual Accomplishments

Years	Accomplishment Narrative	# Benefiting
2023	CDBG funds to support housing rehabilitation loans for lower-income homeowners. A total of 8 units were assisted during the FY 23-24 reporting period. On 4-25-24, \$90,600 in 2023 EN funds were reallocated to Act #511.	



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PGM Year: 2023
Project: 0003 - Paint Program Grants
IDIS Activity: 532 - Paint Program Grants

Status: Open
 Location: 100 Civic Center Dr Lake Forest, CA 92630-9202

Objective: Provide decent affordable housing
 Outcome: Affordability
 Matrix Code: Rehab; Single-Unit Residential (14A) National Objective: LMH

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:

Grants to assist homeowners in painting the exterior of their home

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$35,000.00	\$33,700.00	\$33,700.00
Total	Total			\$35,000.00	\$33,700.00	\$33,700.00

Proposed Accomplishments

Housing Units : 5

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	4	1	0	0	4	1	0	0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	2	0	0	0	2	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	6	1	0	0	6	1	0	0



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Female-headed Households: 3 0 3

Income Category:

	Owner	Renter	Total	Person
Extremely Low	2	0	2	0
Low Mod	2	0	2	0
Moderate	2	0	2	0
Non Low Moderate	0	0	0	0
Total	6	0	6	0
Percent Low/Mod	100.0%		100.0%	

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	Six (6) paint grants were awarded in FY 2023-2024.	



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PGM Year: 2023
Project: 0004 - Age Well Senior Services
IDIS Activity: 533 - Age Well Senior Services
Status: Completed 8/22/2024 3:50:29 PM
Location: 100 Civic Center Dr Lake Forest, CA 92630-9202
Objective: Create suitable living environments
Outcome: Availability/accessibility
Matrix Code: Senior Services (05A) **National Objective:** LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:
 Case management and in-home support services for home-bound seniors and frail elderly

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$6,779.51	\$6,779.51	\$6,779.51
Total	Total			\$6,779.51	\$6,779.51	\$6,779.51

Proposed Accomplishments

People (General) : 20

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	19	4
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	19	4



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Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	11
Low Mod	0	0	0	6
Moderate	0	0	0	2
Non Low Moderate	0	0	0	0
Total	0	0	0	19
Percent Low/Mod				100.0%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	Age Well assisted 12 people in Quarter 1, 0 people in Quarter 2, 5 people in Quarter 3, and 2 people in Quarter 4 for a total of 19 low-income residents served in FY 2023-2024. Of these 12 were female-headed households and 9 were disabled. CDBG funds were used to support case management and in-home support services for home-bound seniors and frail elderly.	



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PGM Year: 2023
Project: 0005 - Alzheimers Orange County
IDIS Activity: 534 - Alzheimer's Orange County
Status: Completed 8/22/2024 4:53:31 PM
Location: 100 Civic Center Dr Lake Forest, CA 92630-9202
Objective: Create suitable living environments
Outcome: Availability/accessibility
Matrix Code: Senior Services (05A) **National Objective:** LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:
 Adult daycare and ancillary services for seniors and adults with Alzheimes, other forms of dementia, and disabilities

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$5,000.00	\$5,000.00	\$5,000.00
Total	Total			\$5,000.00	\$5,000.00	\$5,000.00

Proposed Accomplishments

People (General) : 23

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	17	2
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	4	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	21	2



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Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	7
Low Mod	0	0	0	2
Moderate	0	0	0	6
Non Low Moderate	0	0	0	6
Total	0	0	0	21
Percent Low/Mod				71.4%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	Alzheimer's of Orange County assisted 11 people in Quarter 1, 3 people in Quarter 2, 1 people in Quarter 3, and 6 people in Quarter 4 for a total of 21 low-income residents served in FY 2023-2024. Of these 0 were female headed households and 21 were disabled. CDBG funds allocated to support adult daycare services for seniors and adults with dementia or physical disabilities.	



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PGM Year: 2023
Project: 0006 - Camino Health Center
IDIS Activity: 535 - Camino Health Center
Status: Completed 8/22/2024 3:09:30 PM
Location: 22481 Aspan St Ste A Lake Forest, CA 92630-1648
Objective: Create suitable living environments
Outcome: Availability/accessibility
Matrix Code: Health Services (05M) **National Objective:** LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:
 Reduced cost medical services for low- and moderate-income persons

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$15,000.00	\$15,000.00	\$15,000.00
Total	Total			\$15,000.00	\$15,000.00	\$15,000.00

Proposed Accomplishments

People (General) : 2,330

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	1,705	1,356
Black/African American:	0	0	0	0	0	0	10	1
Asian:	0	0	0	0	0	0	150	0
American Indian/Alaskan Native:	0	0	0	0	0	0	5	1
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	13	3
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	269	41
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	2,152	1,402



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Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	2,055
Low Mod	0	0	0	82
Moderate	0	0	0	9
Non Low Moderate	0	0	0	6
Total	0	0	0	2,152
Percent Low/Mod				99.7%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	<p>Camino Health Centers assisted 1,067 people in Quarter 1, 432 people in Quarter 2, 345 people in Quarter 3, and 308 people in Quarter 4 for a total of 2,152 low-income residents served in FY 2023-2024. Of these 597 were female headed households and 0 were disabled.</p> <p>CDBG funds were used to support case management for homeless families with children and families with children that are at risk of becoming homeless.</p> <p>CDBG funds to support reduced cost medical services for low- and moderate-income persons. Services include primary care, acute care, chronic disease management, well-child exams, prenatal care, cancer detecting screening, immunizations, and lab services. Behavioral health services include counseling/therapy services, psychiatric medication assessment, and case management. Dental services include exams, x-rays, cleanings, sealants, fillings and limited emergency services.</p>	



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PGM Year: 2023
Project: 0007 - Fair Housing Council of OC
IDIS Activity: 536 - Fair Housing Council of OC

Status: Completed 8/22/2024 3:00:45 PM
Location: ,
Objective:
Outcome:
Matrix Code: Fair Housing Activities (subject to 20% Admin Cap) (21D) **National Objective:**

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:

Fair housing outreach, education, enforcement services, and enhanced mediation services due to the lifting of the eviction moratorium. A total of 101 households were assisted during FY 23-24 reporting period. 92.5% of assisted households are low and moderate-income. 4 allegations of housing discrimination have been reported; 1 case has been opened for investigation. Primary housing issues addressed during the reporting period include rental agreements, eviction notices, and housing repairs/maintenance.

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$7,500.00	\$7,500.00	\$7,500.00
Total	Total			\$7,500.00	\$7,500.00	\$7,500.00

Proposed Accomplishments

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:					0	0		
Black/African American:					0	0		
Asian:					0	0		
American Indian/Alaskan Native:					0	0		
Native Hawaiian/Other Pacific Islander:					0	0		
American Indian/Alaskan Native & White:					0	0		
Asian White:					0	0		
Black/African American & White:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		
Other multi-racial:					0	0		
Asian/Pacific Islander:					0	0		
Hispanic:					0	0		



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PGM Year: 2023
Project: 0008 - Families Forward
IDIS Activity: 537 - Families Forward

Status: Completed 8/22/2024 2:59:55 PM
 Location: 8 Thomas Irvine, CA 92618-2763

Objective: Create suitable living environments
 Outcome: Availability/accessibility
 Matrix Code: Operating Costs of Homeless/AIDS Patients Programs (03T) National Objective: LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:

Case management for homeless families with children and families with children that are at risk of becoming homeless

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$16,114.96	\$16,114.96	\$16,114.96
Total	Total			\$16,114.96	\$16,114.96	\$16,114.96

Proposed Accomplishments

People (General) : 23

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	10	5
Black/African American:	0	0	0	0	0	0	13	6
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	2	2
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	4	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	1	0
Other multi-racial:	0	0	0	0	0	0	4	2
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	34	15



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Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	15
Low Mod	0	0	0	17
Moderate	0	0	0	0
Non Low Moderate	0	0	0	2
Total	0	0	0	34
Percent Low/Mod				94.1%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	Families Forward assisted 15 people in Quarter 1, 3 people in Quarter 2, 8 people in Quarter 3, and 8 people in Quarter 4 for a total of 34 low-income residents served in FY 2023-2024. Of these 10 were female headed households and 2 were disabled. CDBG funds were used to support case management for homeless families with children and families with children that are at risk of becoming homeless.	



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PGM Year: 2023
Project: 0009 - Family Assistance Ministry
IDIS Activity: 538 - Family Assistance Ministries
Status: Completed 8/29/2024 5:01:09 PM
Location: 1030 Calle Negocio San Clemente, CA 92673-6203
Objective: Create suitable living environments
Outcome: Availability/accessibility
Matrix Code: Operating Costs of Homeless/AIDS Patients Programs (03T) **National Objective:** LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:

Case management, food assistance, rental or utility assistance, and case management for households at risk of homelessness or that may be homeless

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$10,000.00	\$10,000.00	\$10,000.00
Total	Total			\$10,000.00	\$10,000.00	\$10,000.00

Proposed Accomplishments

People (General) : 1,000

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	242	146
Black/African American:	0	0	0	0	0	0	27	0
Asian:	0	0	0	0	0	0	6	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	6	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	2	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	68	61
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	351	207



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Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	338
Low Mod	0	0	0	13
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	351
Percent Low/Mod				100.0%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	<p>Family Assistance Ministries assisted 181 people in Quarter 1, 93 people in Quarter 2, 60 people in Quarter 3, and 17 people in Quarter 4 for a total of 351 low-income residents served in FY 2023-2024. Of these 82 were female headed households and 34 were disabled.</p> <p>CDBG funds used to provide case management and food for Lake Forest households at risk of becoming homeless.</p>	



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PGM Year: 2023
Project: 0010 - South County Outreach
IDIS Activity: 539 - South County Outreach

Status: Completed 8/22/2024 2:46:25 PM
 Location: 7 Whatney Ste B Irvine, CA 92618-2849

Objective: Create suitable living environments
 Outcome: Availability/accessibility
 Matrix Code: Operating Costs of Homeless/AIDS Patients Programs (03T) National Objective: LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:

Foodbank services, including case management - services also include emergency rent and utility assistance to prevent eviction or termination of services

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$17,000.00	\$17,000.00	\$17,000.00
Total	Total			\$17,000.00	\$17,000.00	\$17,000.00

Proposed Accomplishments

People (General) : 362

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	120	61
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	27	0
American Indian/Alaskan Native:	0	0	0	0	0	0	1	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	2	2
Asian White:	0	0	0	0	0	0	3	0
Black/African American & White:	0	0	0	0	0	0	1	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	41	31
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	195	94



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Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	159
Low Mod	0	0	0	31
Moderate	0	0	0	5
Non Low Moderate	0	0	0	0
Total	0	0	0	195
Percent Low/Mod				100.0%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	South County Outreach assisted 28 people in Quarter 1, 68 people in Quarter 2, 66 people in Quarter 3, and 33 people in Quarter 4 for a total of 195 low-income residents served in FY 2023-2024. Of these 125 were female headed households and 8 were disabled. CDBG funds to support food bank and rent/utility assistance program for lower-income Lake Forest households at risk of becoming homeless.	



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PGM Year: 2023
Project: 0011 - Vocational Visions
IDIS Activity: 540 - Vocational Visions

Status: Completed 8/22/2024 2:46:05 PM
 Location: 26041 Pala Mission Viejo, CA 92691-2705

Objective: Create suitable living environments
 Outcome: Availability/accessibility
 Matrix Code: Services for Persons with Disabilities (05B) National Objective: LMC

Activity to prevent, prepare for, and respond to Coronavirus: No

Initial Funding Date: 09/22/2023

Description:
 Job development for services for adults with developmental disabilities

Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	2023	B23MC060584	\$1,778.00	\$1,778.00	\$1,778.00
Total	Total			\$1,778.00	\$1,778.00	\$1,778.00

Proposed Accomplishments

People (General) : 27

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	20	1
Black/African American:	0	0	0	0	0	0	5	0
Asian:	0	0	0	0	0	0	1	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	1	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	27	1



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Female-headed Households: 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	27
Low Mod	0	0	0	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	27
Percent Low/Mod				100.0%

Annual Accomplishments

Years	Accomplishment Narrative	# Benefitting
2023	Vocational Visions assisted 27 extremely-low-income residents with intellectual and developmental disabilities in FY 2023-2024. Services included vocational training to ensure a pathway to employment, social inclusion, and lifelong learning.	



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Total Funded Amount:	\$2,485,396.57
Total Drawn Thru Program Year:	\$1,976,767.65
Total Drawn In Program Year:	\$1,179,934.50



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PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	752,481.57
02 ENTITLEMENT GRANT	520,784.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	149,653.62
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
06a FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	1,422,919.19

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	716,755.03
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	716,755.03
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	78,385.54
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	795,140.57
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	627,778.62

PART III: LOWMOD BENEFIT THIS REPORTING PERIOD

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	716,755.03
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	716,755.03
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%

LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: 2023 PY: PY:
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	0.00
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	0.00
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	0.00%

PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	71,672.47
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	71,672.47
32 ENTITLEMENT GRANT	520,784.00
33 PRIOR YEAR PROGRAM INCOME	131,109.07
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	651,893.07
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	10.99%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	78,385.54
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	0.00
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	78,385.54
42 ENTITLEMENT GRANT	520,784.00
43 CURRENT YEAR PROGRAM INCOME	149,653.62
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	670,437.62
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	11.69%



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LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17

No data returned for this view. This might be because the applied filter excludes all data.

LINE 18 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 18

No data returned for this view. This might be because the applied filter excludes all data.

LINE 19 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 19

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	24	511	6894386	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$90,600.00
					03A	Matrix Code	\$90,600.00
2019	2	465	6885350	El Toro Park Improvements	03F	LMA	\$34,500.00
					03F	Matrix Code	\$34,500.00
2019	14	477	6878335	Accessible Pedestrian Signals (APS) Installation	03L	LMC	\$53,339.00
2021	12	506	6850275	ADA Sidewalk Curb Ramps Phase 13	03L	LMC	\$1,914.00
2021	12	506	6859212	ADA Sidewalk Curb Ramps Phase 13	03L	LMC	\$108,726.00
2021	12	506	6878335	ADA Sidewalk Curb Ramps Phase 13	03L	LMC	\$17,620.00
2021	12	506	6894386	ADA Sidewalk Curb Ramps Phase 13	03L	LMC	\$1,543.00
2022	14	528	6834058	ADA Sidewalk Curb Ramps Phase 14	03L	LMC	\$4,199.93
2022	14	528	6841179	ADA Sidewalk Curb Ramps Phase 14	03L	LMC	\$1,405.66
2022	14	528	6885350	ADA Sidewalk Curb Ramps Phase 14	03L	LMC	\$1,666.07
2022	14	528	6894391	ADA Sidewalk Curb Ramps Phase 14	03L	LMC	\$81,506.75
2022	14	528	6914723	ADA Sidewalk Curb Ramps Phase 14	03L	LMC	\$18,569.00
2022	14	528	6932551	ADA Sidewalk Curb Ramps Phase 14	03L	LMC	\$2,618.00
					03L	Matrix Code	\$293,107.41
2023	8	537	6850275	Families Forward	03T	LMC	\$3,661.56
2023	8	537	6885350	Families Forward	03T	LMC	\$6,656.99
2023	8	537	6894391	Families Forward	03T	LMC	\$5,796.41
2023	9	538	6850275	Family Assistance Ministries	03T	LMC	\$1,572.36
2023	9	538	6878335	Family Assistance Ministries	03T	LMC	\$427.64
2023	9	538	6932551	Family Assistance Ministries	03T	LMC	\$3,837.07
2023	9	538	6935116	Family Assistance Ministries	03T	LMC	\$4,162.93
2023	10	539	6850275	South County Outreach	03T	LMC	\$4,982.00
2023	10	539	6878335	South County Outreach	03T	LMC	\$3,474.06
2023	10	539	6894391	South County Outreach	03T	LMC	\$4,750.00
2023	10	539	6932551	South County Outreach	03T	LMC	\$3,793.94
					03T	Matrix Code	\$43,114.96
2023	4	533	6850275	Age Well Senior Services	05A	LMC	\$1,875.00
2023	4	533	6885350	Age Well Senior Services	05A	LMC	\$1,665.00
2023	4	533	6914723	Age Well Senior Services	05A	LMC	\$1,980.00
2023	4	533	6932551	Age Well Senior Services	05A	LMC	\$1,259.51
2023	5	534	6850275	Alzheimer's Orange County	05A	LMC	\$1,250.00
2023	5	534	6878335	Alzheimer's Orange County	05A	LMC	\$1,250.00
2023	5	534	6894391	Alzheimer's Orange County	05A	LMC	\$1,250.00
2023	5	534	6932551	Alzheimer's Orange County	05A	LMC	\$1,250.00
					05A	Matrix Code	\$11,779.51
2023	11	540	6850275	Vocational Visions	05B	LMC	\$825.00
2023	11	540	6894391	Vocational Visions	05B	LMC	\$253.00
2023	11	540	6932551	Vocational Visions	05B	LMC	\$700.00
					05B	Matrix Code	\$1,778.00
2023	6	535	6850275	Camino Health Center	05M	LMC	\$3,750.00
2023	6	535	6885350	Camino Health Center	05M	LMC	\$3,750.00
2023	6	535	6894391	Camino Health Center	05M	LMC	\$3,750.00
2023	6	535	6932551	Camino Health Center	05M	LMC	\$3,750.00
					05M	Matrix Code	\$15,000.00
2023	2	531	6834058	Housing Rehabilitation Loans	14A	LMH	\$2,550.00
2023	2	531	6834062	Housing Rehabilitation Loans	14A	LMH	\$16,485.00
2023	2	531	6841179	Housing Rehabilitation Loans	14A	LMH	\$2,521.00



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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2023	2	531	6850275	Housing Rehabilitation Loans	14A	LMH	\$27,620.35
2023	2	531	6859212	Housing Rehabilitation Loans	14A	LMH	\$1,576.16
2023	2	531	6878335	Housing Rehabilitation Loans	14A	LMH	\$33,361.00
2023	2	531	6885350	Housing Rehabilitation Loans	14A	LMH	\$1,610.00
2023	2	531	6894386	Housing Rehabilitation Loans	14A	LMH	\$17,301.00
2023	2	531	6894391	Housing Rehabilitation Loans	14A	LMH	\$3,519.80
2023	2	531	6914723	Housing Rehabilitation Loans	14A	LMH	\$33,149.49
2023	2	531	6932551	Housing Rehabilitation Loans	14A	LMH	\$53,481.35
2023	3	532	6834058	Paint Program Grants	14A	LMH	\$225.00
2023	3	532	6834062	Paint Program Grants	14A	LMH	\$630.00
2023	3	532	6841179	Paint Program Grants	14A	LMH	\$405.00
2023	3	532	6850275	Paint Program Grants	14A	LMH	\$495.00
2023	3	532	6859212	Paint Program Grants	14A	LMH	\$4,905.00
2023	3	532	6878335	Paint Program Grants	14A	LMH	\$17,545.00
2023	3	532	6885350	Paint Program Grants	14A	LMH	\$630.00
2023	3	532	6894386	Paint Program Grants	14A	LMH	\$135.00
2023	3	532	6894391	Paint Program Grants	14A	LMH	\$90.00
2023	3	532	6914723	Paint Program Grants	14A	LMH	\$3,825.00
2023	3	532	6932551	Paint Program Grants	14A	LMH	\$4,815.00
						Matrix Code	\$226,875.15
Total							\$716,755.03

LINE 27 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 27

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity to prevent, prepare for, and respond to Coronavirus	Activity Name	Grant Number	Fund Type	Matrix Code	National Objective	Drawn Amount
2023	8	537	6850275	No	Families Forward	B23MC060584	EN	03T	LMC	\$3,661.56
2023	8	537	6885350	No	Families Forward	B23MC060584	EN	03T	LMC	\$6,656.99
2023	8	537	6894391	No	Families Forward	B23MC060584	EN	03T	LMC	\$5,796.41
2023	9	538	6850275	No	Family Assistance Ministries	B23MC060584	EN	03T	LMC	\$1,572.36
2023	9	538	6878335	No	Family Assistance Ministries	B23MC060584	EN	03T	LMC	\$427.64
2023	9	538	6932551	No	Family Assistance Ministries	B23MC060584	EN	03T	LMC	\$3,837.07
2023	9	538	6935116	No	Family Assistance Ministries	B23MC060584	EN	03T	LMC	\$4,162.93
2023	10	539	6850275	No	South County Outreach	B23MC060584	EN	03T	LMC	\$4,982.00
2023	10	539	6878335	No	South County Outreach	B23MC060584	EN	03T	LMC	\$3,474.06
2023	10	539	6894391	No	South County Outreach	B23MC060584	EN	03T	LMC	\$4,750.00
2023	10	539	6932551	No	South County Outreach	B23MC060584	EN	03T	LMC	\$3,793.94
									Matrix Code	\$43,114.96
2023	4	533	6850275	No	Age Well Senior Services	B23MC060584	EN	05A	LMC	\$1,875.00
2023	4	533	6885350	No	Age Well Senior Services	B23MC060584	EN	05A	LMC	\$1,665.00
2023	4	533	6914723	No	Age Well Senior Services	B23MC060584	EN	05A	LMC	\$1,980.00
2023	4	533	6932551	No	Age Well Senior Services	B23MC060584	EN	05A	LMC	\$1,259.51
2023	5	534	6850275	No	Alzheimer's Orange County	B23MC060584	EN	05A	LMC	\$1,250.00
2023	5	534	6878335	No	Alzheimer's Orange County	B23MC060584	EN	05A	LMC	\$1,250.00
2023	5	534	6894391	No	Alzheimer's Orange County	B23MC060584	EN	05A	LMC	\$1,250.00
2023	5	534	6932551	No	Alzheimer's Orange County	B23MC060584	EN	05A	LMC	\$1,250.00
									Matrix Code	\$11,779.51
2023	11	540	6850275	No	Vocational Visions	B23MC060584	EN	05B	LMC	\$825.00
2023	11	540	6894391	No	Vocational Visions	B23MC060584	EN	05B	LMC	\$253.00
2023	11	540	6932551	No	Vocational Visions	B23MC060584	EN	05B	LMC	\$700.00
									Matrix Code	\$1,778.00
2023	6	535	6850275	No	Camino Health Center	B23MC060584	EN	05M	LMC	\$3,750.00
2023	6	535	6885350	No	Camino Health Center	B23MC060584	EN	05M	LMC	\$3,750.00
2023	6	535	6894391	No	Camino Health Center	B23MC060584	EN	05M	LMC	\$3,750.00
2023	6	535	6932551	No	Camino Health Center	B23MC060584	EN	05M	LMC	\$3,750.00
									Matrix Code	\$15,000.00
Total										\$71,672.47

LINE 37 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 37

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2023	1	530	6834050	CDBG Administration	21A		\$1,325.46
2023	1	530	6834058	CDBG Administration	21A		\$2,022.92
2023	1	530	6834062	CDBG Administration	21A		\$2,772.21



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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2023	1	530	6841179	CDBG Administration	21A		\$6,357.18
2023	1	530	6850275	CDBG Administration	21A		\$12,140.62
2023	1	530	6859212	CDBG Administration	21A		\$1,779.61
2023	1	530	6878335	CDBG Administration	21A		\$7,999.66
2023	1	530	6885350	CDBG Administration	21A		\$980.49
2023	1	530	6894386	CDBG Administration	21A		\$3,699.15
2023	1	530	6894391	CDBG Administration	21A		\$15,672.26
2023	1	530	6904802	CDBG Administration	21A		\$1,987.73
2023	1	530	6914723	CDBG Administration	21A		\$1,996.45
2023	1	530	6932551	CDBG Administration	21A		\$12,151.80
					21A	Matrix Code	\$70,885.54
2023	7	536	6850275	Fair Housing Council of OC	21D		\$1,875.00
2023	7	536	6878335	Fair Housing Council of OC	21D		\$1,868.01
2023	7	536	6894391	Fair Housing Council of OC	21D		\$1,878.50
2023	7	536	6932551	Fair Housing Council of OC	21D		\$1,878.49
					21D	Matrix Code	\$7,500.00
Total							\$78,385.54



PART I: SUMMARY OF CDBG-CV RESOURCES

01 CDBG-CV GRANT	862,153.00
02 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
03 FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
04 TOTAL CDBG-CV FUNDS AWARDED	862,153.00

PART II: SUMMARY OF CDBG-CV EXPENDITURES

05 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	792,813.84
06 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	50,114.00
07 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
08 TOTAL EXPENDITURES (SUM, LINES 05 - 07)	842,927.84
09 UNEXPENDED BALANCE (LINE 04 - LINE8)	19,225.16

PART III: LOWMOD BENEFIT FOR THE CDBG-CV GRANT

10 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
11 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
12 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	713,098.84
13 TOTAL LOW/MOD CREDIT (SUM, LINES 10 - 12)	713,098.84
14 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 05)	792,813.84
15 PERCENT LOW/MOD CREDIT (LINE 13/LINE 14)	89.95%

PART IV: PUBLIC SERVICE (PS) CALCULATIONS

16 DISBURSED IN IDIS FOR PUBLIC SERVICES	291,430.14
17 CDBG-CV GRANT	862,153.00
18 PERCENT OF FUNDS DISBURSED FOR PS ACTIVITIES (LINE 16/LINE 17)	33.80%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

19 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	50,114.00
20 CDBG-CV GRANT	862,153.00
21 PERCENT OF FUNDS DISBURSED FOR PA ACTIVITIES (LINE 19/LINE 20)	5.81%



LINE 10 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 10

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LINE 11 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 11

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LINE 12 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 12

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	20	489	6498597	CV-Families Forward	05Q	LMC	\$21,104.05
			6508333	CV-Families Forward	05Q	LMC	\$20,131.50
			6537326	CV-Families Forward	05Q	LMC	\$7,751.12
			6640547	CV-Families Forward	05Q	LMC	\$4,789.26
			6666781	CV-Families Forward	05Q	LMC	\$9,442.07
		490	6480254	CV-Family Assistance Ministries	05Q	LMC	\$17,441.22
			6485411	CV-Family Assistance Ministries	05Q	LMC	\$14,346.28
			6522446	CV-Family Assistance Ministries	05Q	LMC	\$10,983.88
			6537326	CV-Family Assistance Ministries	05Q	LMC	\$4,406.00
			6612144	CV-Family Assistance Ministries	05Q	LMC	\$9,934.56
			6640547	CV-Family Assistance Ministries	05Q	LMC	\$279.12
			6666781	CV-Family Assistance Ministries	05Q	LMC	\$1,333.05
			6713180	CV-Family Assistance Ministries	05Q	LMC	\$2,545.29
			6745513	CV-Family Assistance Ministries	05Q	LMC	\$1,948.60
		491	6498597	CV - South County Outreach	05Q	LMC	\$26,514.00
			6537326	CV - South County Outreach	05Q	LMC	\$35,818.00
			6612144	CV - South County Outreach	05Q	LMC	\$886.00
			6728826	CV - South County Outreach	05Q	LMC	\$12,949.56
			6745513	CV - South County Outreach	05Q	LMC	\$10,335.50
			6791198	CV - South County Outreach	05Q	LMC	\$6,176.47
			6805108	CV - South County Outreach	05Q	LMC	\$9,708.47
		512	6697398	CV - City of Lake Forest Senior Clubhouse Pre-Packaged Food	05A	LMC	\$2,938.25
			6728826	CV - City of Lake Forest Senior Clubhouse Pre-Packaged Food	05A	LMC	\$427.04
			6745513	CV - City of Lake Forest Senior Clubhouse Pre-Packaged Food	05A	LMC	\$740.85
		513	6734839	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
			6745513	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
			6791198	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
			6805108	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
		514	6805108	CV Age Well Accessible Van	05A	LMC	\$33,500.00
	24	510	6669007	CV Public Facility Improvement - Senior Center PPE	03A	LMC	\$3,658.28
			6728826	CV Public Facility Improvement - Senior Center PPE	03A	LMC	\$7,204.17
			6734839	CV Public Facility Improvement - Senior Center PPE	03A	LMC	\$7,527.43
		511	6649229	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$1,400.00
			6666781	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$5,812.50
			6728826	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$3,250.00
			6761667	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$1,165.00
			6770658	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$3,537.50



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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	24	511	6791198	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$5,182.50
			6805108	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$2,560.00
			6834046	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$352.50
			6834047	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$2,275.00
			6841181	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$1,390.00
			6850278	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$3,272.50
			6858623	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$5,730.00
			6878337	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$3,946.25
			6885354	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$4,920.00
			6894387	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$183,866.96
			6932552	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$141,101.86
			6932554	CV Public Facility Improvements - Senior Center Patio Cover	03A	LMC	\$33,516.25
Total							\$713,098.84

LINE 16 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 16

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	20	489	6498597	CV-Families Forward	05Q	LMC	\$21,104.05
			6508333	CV-Families Forward	05Q	LMC	\$20,131.50
			6537326	CV-Families Forward	05Q	LMC	\$7,751.12
			6640547	CV-Families Forward	05Q	LMC	\$4,789.26
			6666781	CV-Families Forward	05Q	LMC	\$9,442.07
		490	6480254	CV-Family Assistance Ministries	05Q	LMC	\$17,441.22
			6485411	CV-Family Assistance Ministries	05Q	LMC	\$14,346.28
			6522446	CV-Family Assistance Ministries	05Q	LMC	\$10,983.88
			6537326	CV-Family Assistance Ministries	05Q	LMC	\$4,406.00
			6612144	CV-Family Assistance Ministries	05Q	LMC	\$9,934.56
			6640547	CV-Family Assistance Ministries	05Q	LMC	\$279.12
			6666781	CV-Family Assistance Ministries	05Q	LMC	\$1,333.05
			6713180	CV-Family Assistance Ministries	05Q	LMC	\$2,545.29
			6745513	CV-Family Assistance Ministries	05Q	LMC	\$1,948.60
		491	6498597	CV - South County Outreach	05Q	LMC	\$26,514.00
			6537326	CV - South County Outreach	05Q	LMC	\$35,818.00
			6612144	CV - South County Outreach	05Q	LMC	\$886.00
			6728826	CV - South County Outreach	05Q	LMC	\$12,949.56
			6745513	CV - South County Outreach	05Q	LMC	\$10,335.50
			6791198	CV - South County Outreach	05Q	LMC	\$6,176.47
			6805108	CV - South County Outreach	05Q	LMC	\$9,708.47
		512	6697398	CV - City of Lake Forest Senior Clubhouse Pre-Packaged Food	05A	LMC	\$2,938.25
			6728826	CV - City of Lake Forest Senior Clubhouse Pre-Packaged Food	05A	LMC	\$427.04
			6745513	CV - City of Lake Forest Senior Clubhouse Pre-Packaged Food	05A	LMC	\$740.85
		513	6734839	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
			6745513	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
			6791198	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
			6805108	CV Age Well Meals on Wheels	05A	LMC	\$6,250.00
		514	6805108	CV Age Well Accessible Van	05A	LMC	\$33,500.00
Total							\$291,430.14

LINE 19 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 19

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	23	494	6522446	CV - Program Administration	21A		\$10,545.00
			6537326	CV - Program Administration	21A		\$4,560.00
			6626665	CV - Program Administration	21A		\$6,411.92
			6640547	CV - Program Administration	21A		\$5,472.03
			6649229	CV - Program Administration	21A		\$12.39
			6666781	CV - Program Administration	21A		\$4,507.07



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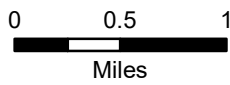
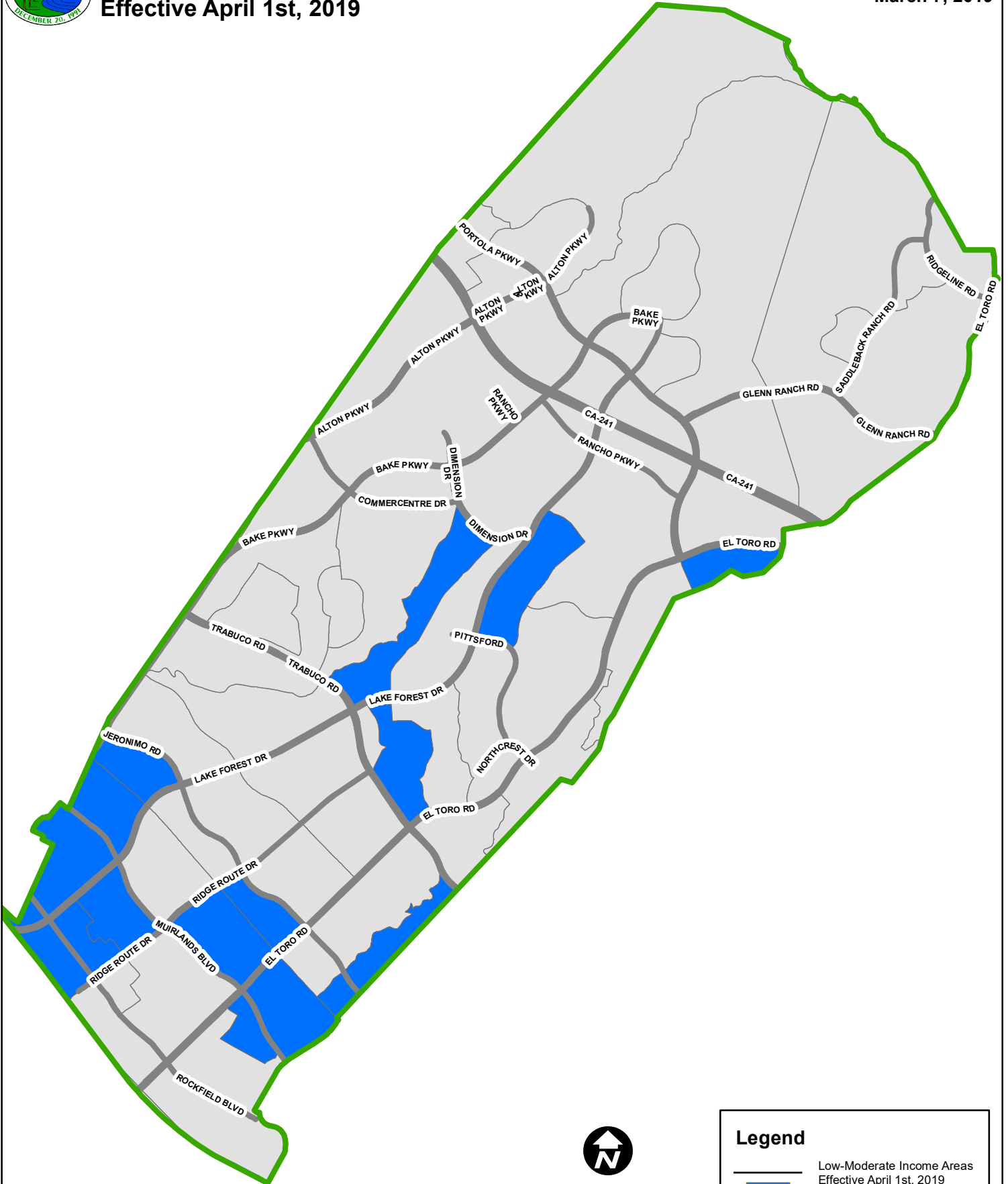
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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	23	494	6697394	CV - Program Administration	21A		\$142.00
			6697395	CV - Program Administration	21A		\$205.24
			6697398	CV - Program Administration	21A		\$619.78
			6707737	CV - Program Administration	21A		\$284.33
			6713180	CV - Program Administration	21A		\$442.58
			6728826	CV - Program Administration	21A		\$4,684.67
			6734839	CV - Program Administration	21A		\$2,816.97
			6745513	CV - Program Administration	21A		\$724.61
			6761667	CV - Program Administration	21A		\$883.32
			6770658	CV - Program Administration	21A		\$2,364.32
			6791198	CV - Program Administration	21A		\$152.84
			6805108	CV - Program Administration	21A		\$862.32
			6834045	CV - Program Administration	21A		\$257.68
			6834046	CV - Program Administration	21A		\$402.39
			6834047	CV - Program Administration	21A		\$328.67
			6841181	CV - Program Administration	21A		\$122.37
			6850278	CV - Program Administration	21A		\$2,087.46
			6858623	CV - Program Administration	21A		\$307.67
			6878337	CV - Program Administration	21A		\$646.96
			6885354	CV - Program Administration	21A		\$138.41
			6894387	CV - Program Administration	21A		\$131.00
Total							\$50,114.00



City of Lake Forest Low-Moderate Income Areas Effective April 1st, 2019

Community Development Dept.
March 7, 2019



Legend

- Low-Moderate Income Areas Effective April 1st, 2019
-

Analysis of Impediments to Fair Housing Summary

PROPOSED AI GOALS AND STRATEGIES	FY 2023-24 ACCOMPLISHMENTS
<p>1) In collaboration with the OCHA:</p> <ul style="list-style-type: none"> a) Attend quarterly Orange County Housing Authority (OCHA) Housing Advisory Committee to enhance the exchange of information regarding the availability, procedures, and policies related to the Housing Assistance Voucher program and regional housing issues. b) Support OCHA's affirmative fair marketing plan and de-concentration policies by providing five-year and annual PHA plan certifications. c) In coordination with OCHA and fair housing services provider, conduct landlord education campaign to educate property owners about State law prohibiting discrimination based on household income. 	<ul style="list-style-type: none"> a) City staff attended quarterly online meetings. b) The City provided the PHA Plan certifications to OCHA staff upon request. c) California law expanded “source of income” protections to individuals who use housing rent assistance (e.g., Housing Choice Voucher) effective January 2020. FHCOC did not identify any notices in Craigslist postings containing discriminatory language, including improper references to “older adults,” restrictions regarding children under 18, and the use of rental assistance. FHCOC did respond to complaints of “refusal to accept housing assistance” on other platforms. FHCOC contacted the individuals posting these ads to remove the discriminatory content when possible.
<p>2) Through the City's fair housing contractor:</p> <ul style="list-style-type: none"> a) Provide fair housing education and information to apartment managers and homeowner associations on why denial of reasonable modifications/accommodations is unlawful. b) Conduct multi-faceted fair housing outreach to tenants, landlords, property owners, realtors, and property management companies. Methods of outreach may include workshops, informational booths, presentations to community groups, and distribution of multi-lingual fair housing literature. c) Provide general fair housing counseling and referrals services to address tenant-landlord issues and investigate allegations of fair housing discrimination and take appropriate actions to conciliate cases or refer to appropriate authorities. 	<ul style="list-style-type: none"> a) Regionally, FHCOC received 14 inquiries regarding reasonable accommodations and modifications - 1 arose from Lake Forest. Overall, 6 of the 14 clients received a reasonable accommodation, 2 clients did not follow through in process, 1 client’s request was deemed not implementable, and the outcome for 5 others, including 1 modification request, were pending at the end of the program year. b) During FY 23-24, 17 regional training sessions for rental property owners/managers. Additionally, FHCOC presented 2 virtual fair housing seminars for housing providers in partnership with the Apartment Association of Orange County. FHCOC also conducted or participated in 13 virtual and 49 in-person regional virtual education or outreach activities, at which participants were made aware of fair housing laws and counseling services. While most information sessions limited participation to online platforms, all activities were available to Lake Forest residents. c) On a regional basis, FHCOC addressed 93 allegations of housing discrimination – 37 cases were opened for further investigation. 3 allegations arose from Lake Forest and 2 cases involved housing in Lake Forest. With respect to landlord/tenant issues, on a regional basis, FHCOC assisted 3,133 unduplicated households by addressing 11,021 fair

Analysis of Impediments to Fair Housing Summary

<p>d) Periodically monitor local newspapers and online media outlets to identify potentially discriminatory housing advertisements.</p> <p>e) Include testing/audits within the scope of work with fair housing provider.</p> <p>f) Regularly consult with the City's fair housing contractor on potential strategies for affirmatively furthering fair housing on an on-going basis.</p>	<p>housing issues, disputes, and inquires - 101 unduplicated households involving 363 issues, disputes, or inquires were from Lake Forest.</p> <p>d) FHCOC monitored Craigslist for discriminatory content. Discriminatory ads were flagged, and if an investigation was feasible, the ad was referred to FHCOC's investigators for enforcement action. Other online rental advertising sites (e.g., OC Register, LA Times, Zillow) were sporadically monitored; the lack of an efficient text search function on these sites made monitoring less practical. The most common problematic postings indicated restrictions regarding children under 18 or improper preference for seniors. Overt racial or national origin discrimination was not observed.</p> <p>e) FHCOC also conducted 121 paired telephonic, systemic tests for discriminatory rental housing practices on a regional basis. An additional 13 paired systemic tests of real estate agents and 10 paired systemic pre-application tests of lenders were conducted telephonically. 3 systemic tests involved locations in Lake Forest.</p> <p>f) In FY 20-21, City staff discussed programming strategies with FHCOC regarding education and enforcement activity related to the COVID-19 pandemic eviction moratorium.</p>
<p>3) In cooperation with the Orange County Transportation Authority:</p> <p>a) Provide community education regarding transport services for persons with disabilities.</p> <p>b) Explore bus route options to ensure neighborhoods with a concentration of low-income or protected class populations have access to transportation services.</p>	<p>a) No activity to report for FY 2023-24</p> <p>b) No activity to report for FY 2023-24</p>
<p>4) Support local eviction prevention strategies to reduce the number of homeless individuals and families (homelessness prevention services).</p>	<ul style="list-style-type: none"> ▪ The City used both CDBG and CDBG-CV funds to support services to prevent the loss of housing due to COVID-19.
<p>5) Prepare a new Housing Element that complies with all current State laws and is certified by the California Department of Housing and Community Development.</p>	<ul style="list-style-type: none"> ▪ The City Council approved the 2021-2029 Housing Element on January 3, 2023. ▪ CA HCD certified the City's 2021-2029 Housing Element on February 24, 2023.
<p>6) Update zoning ordinance to comply with current State law.</p>	<ul style="list-style-type: none"> ▪ The City revised its Accessory Dwelling Unit (ADU) regulations to comply with current State law during FY 21-22. In August 2022, the City Council approved an update the ADU ordinance to ensure consistency with State law and guidance from HCD. In addition, in August 2022, the City Council approved a Zoning Code amendment that

Analysis of Impediments to Fair Housing Summary

	created new mixed-use zoning districts that provide for consistency with mixed-use land use designations recently established (2020) in the General Plan.
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**PUBLIC NOTICE
PUBLIC REVIEW PERIOD AND
PUBLIC HEARING TO BE HELD BY
THE CITY OF LAKE FOREST CITY COUNCIL**

**CDBG CONSOLIDATED ANNUAL PERFORMANCE EVALUATION REPORT
FOR THE PERIOD OF JULY 1, 2023 THROUGH JUNE 30, 2024**

NOTICE IS HEREBY GIVEN: The City of Lake Forest has completed its draft Consolidated Annual Performance Evaluation Report ("CAPER") for Program Year 2023/2024. The CAPER describes the use of Community Development Block Grant (CDBG) and Community Development Block Grant-Coronavirus (CDBG-CV) funds received from the U.S. Department of Housing and Urban Development (HUD) and expended by the City of Lake Forest between July 1, 2023 and June 30, 2024 (Program Year 2023/2024).

Specifically, CDBG funds were expended for the following activities:

- Social Services
- Program Administration and Fair Housing Advocacy
- COVID-related Assistance
- Housing Rehabilitation Programs
- Public Infrastructure and Facility Improvements
- COVID-related facility improvements

All activities undertaken by the City are consistent with HUD national program objectives of providing decent housing, fair housing opportunities, public services, and other community development activities that primarily benefit low- and moderate-income persons. CDBG-CV funds have been used to prevent, prepare for, or respond to local impacts of the Coronavirus pandemic.

All persons interested in reviewing the draft 2023/2024 CAPER may do so from September 3, 2024 through September 18, 2024, online at www.lakeforestca.gov/854/Community-Development-Block-Grant or at Lake Forest City Hall, located at 100 Civic Center Drive, during regular business hours. Written comments or requests for additional information should be directed to Adrian Grijalva, Economic Development/Housing Manager, 100 Civic Center Drive, Lake Forest, CA 92630, or agrijalva@lakeforestca.gov by 4:00 PM September 18, 2024.

NOTICE IS FURTHER GIVEN: The City Council will hold a Public Hearing to consider the draft CAPER.

Hearing Date: September 17, 2024
Hearing Time: 6:30 PM
Hearing Location: City of Lake Forest City Council Chambers
100 Civic Center Drive, Lake Forest, CA

Environmental Documentation: The activity is not subject to the California Environmental Quality Act ("CEQA") pursuant to Sections 15060(c)(2) because the activity, which involves approval of an annual report, will not result in a direct or reasonably foreseeable indirect physical change in the environment; and 15060(c)(3) because the activity is not a project as defined in Section 15378 of the CEQA Guidelines, California Code of regulations, Title 14, Chapter 3, because it has no potential for resulting in physical change to the environment, directly or indirectly.

All persons either favoring or opposing this proposal are invited to present their views before or at this hearing. It is requested that any supportive documents and/or written comments be submitted prior to the public hearing.

Agenda on the Internet: The meeting Agenda will be available on the City website at <https://lakeforestca.gov/129/Agendas>. You can access the document on the Friday before the meeting. The meeting will also be livestreamed on the City website.

Agenda Document Review: The full Agenda including all back up information will be available at City Hall, 100 Civic Center Drive, Lake Forest, California, on the Friday before the meeting.

Agenda Description: The Agenda descriptions are intended to give notice to members of the public of a general summary of items of business to be transacted or discussed. The listed Recommended Action represents the City staff's recommendation. The City Council may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the recommended action.

Public Comment prior to meeting: Members of the public may submit email comments to council@lakeforestca.gov. Email comments will be uploaded to the agenda packet and made part of the official public record of the meeting and will not be read at the meeting. To ensure staff reviews all comments prior to the City Council meeting, please submit email comments no later than 5:00 p.m. the day of the meeting.

Public Comment at meeting: Members of the public may provide in-person, verbal comments for any item during the meeting. Those wishing to provide comments will be asked to fill out a speaker card and provide it to the City Clerk prior to the commencement of the meeting.

Any petition for judicial review of a decision of the Lake Forest City Council is controlled by the statute of limitations provisions set forth in Sections 2.50.010 and 2.50.020 of the Lake Forest Municipal Code ("LFMC") and Sections 1094.5 and 1094.6 of the California Code of Civil Procedure. Any action or proceeding to attack, review, set aside, or void any decision of the Lake Forest City Council is controlled by Section 2.50.010 and Section 2.50.020 of the LFMC.

Any such action or proceeding that seeks judicial review of, attacks, or seeks to set aside or void any decision of the Lake Forest City Council shall be limited to those issues raised at the hearing described in this notice or in written correspondence delivered to the City Clerk, at, or prior to, the public hearing described in this notice, and must be commenced within the time limits specified in Chapter 2.50 of the LFMC.

WHO TO CONTACT FOR INFORMATION - For additional information, please contact Adrian Grijalva, at (949) 461-3449 or via e-mail at agrijalva@lakeforestca.gov

If you need special assistance to participate in this meeting, please contact the City Clerk at (949) 461-3420. Notification at least 48 hours prior to the meeting will enable the City to make reasonable arrangements to ensure accessibility to this meeting.

/s/ Lisa Berglund, MPA
City Clerk

SUMMARY OF PUBLIC COMMENTS

15-DAY COMMENT PERIOD

As of the posting of this draft, no public comments have been recieved.

PUBLIC HEARING

TBD.