Housing Plan

Introduction

Located in southwestern Orange County, Aliso Viejo is approximately bisected by Highway 73 with Laguna Beach bordering to the southwest, Laguna Woods to the north, Laguna Hills to the east, and Laguna Niguel and unincorporated County lands to the south. A primarily residential community, Aliso Viejo offers a wide variety of housing opportunities and has adequate schools, employment, shopping, parks, and open space for the recreation and leisure needs of its residents.

The Aliso Viejo Planned Community, which comprises the majority of the City, began development in the early 1980s. Following rapid growth in the 1980s and 1990s, residential portions of the planning area reached build-out soon after the City’s incorporation on July 1, 2001, becoming the 34th city in Orange County.

At the time of incorporation in 2001, the City’s vacant or underutilized sites were entitled with non-residential uses as specified in the Aliso Viejo Master Development Agreement approved by the County in 1988. However, with the City’s adoption of its first General Plan in 2004, the opportunity for additional housing within the community became part of the General Plan process. The Community Benefit Overlay (CBO) concept, outlined in the Land Use Element, allowed modification to existing entitlements: 1) if the proposed development could be shown to provide added benefit to the community, and 2) if property owners were willing to forego or amend the 1988 entitlements under the Master Development Agreement. One such community benefit was the provision of housing affordable to very-low- and low-income households. Through the CBO mechanism, the potential for new construction of housing affordable to lower-income households was greatly increased, and the concept furthered local, regional, and state housing goals.
PURPOSE OF THE HOUSING ELEMENT

The Housing Element serves as a guide for future residential growth in Aliso Viejo and establishes a strategy for meeting the community’s housing needs. The Housing Element is designed to achieve the following objectives set forth in state law:

1) Identify adequate sites for a range of housing opportunities;
2) Assist in the development of adequate and affordable housing;
3) Address constraints to meeting the City’s housing needs;
4) Conserve and improve the condition of housing; and
5) Promote equal housing opportunities for all persons.

SCOPE AND CONTENT OF THE HOUSING ELEMENT

The Housing Element is a mandated component of the General Plan and satisfies the requirements of state planning law. The Housing Element contains two parts – the Housing Plan and the Community Profile. The Housing Plan has three sections: 1) Introduction; 2) Issues, Goals and Policies; and 3) Housing Programs. In the Issues, Goals and Policies section, potential housing issues are identified and discussed, and goals and policies are established to address these issues. The Housing Plan describes how the goals and policies will be achieved and implemented.

The Community Profile, contained in the General Plan as Appendix C, and part of the Housing Element, analyzes community demographics and housing stock characteristics, potential constraints to housing development, and identifies resources to meet the community’s housing needs.

RELATIONSHIP TO OTHER GENERAL PLAN ELEMENTS

California planning law requires the Housing Element to be consistent with other General Plan elements. Development policies contained in the Land Use Element, which establish the location, type, density, and distribution of land uses, including housing, support the goals of the Housing Element by identifying suitable locations for a variety of housing types.

All policies and programs within this Housing Element have been analyzed and found to be consistent with the other elements of the General Plan.

PUBLIC PARTICIPATION

The City’s previous Housing Element was adopted on April 21, 2004 and was certified by the Department of Housing and Community Development (HCD). The adopted Housing Element covered the period 2000-2005. For the 2008–2014 planning period, or 4th
cycle, the City began with a Community Forum Public Workshop on September 29, 2008 to solicit comments from all interested members of the public. Those attending the meeting were asked to respond to a questionnaire regarding housing preferences in Aliso Viejo. On October 15, 2008, the City Council held a public hearing to solicit additional public input on the draft Element. The City Council held an additional hearing on January 7, 2009, at which the Council requested revisions to data and addition of clarifying statements.

On January 20, 2009, the City sent the first of five Housing Element drafts to HCD. After receiving comments on the draft Housing Element on March 24, 2009, the City held a hearing on September 2, 2009 and then submitted further drafts for review and received additional comments in letters dated November 16, 2009, May 13, 2010, and January 21, 2011.

On January 31, 2012, the City of Aliso Viejo received a fifth review letter which stated as a result of Program 1 the revised element will comply with State housing element law (Article 10.6 of the Government Code) when the revisions are adopted and submitted to the department, pursuant to Government Code Section 65585(g). Program 1 of the revised element allows single- and multi-family residential development by-right, demonstrates at least 50 percent of the identified sites are designated exclusively residential and commits the City to amending the General Plan and zoning designations for 2C Liberty and 4 Orion to accommodate 100 percent of its unmet lower-income need. From February 2012 to March 2013, the City worked to prepare the necessary environmental documentation for the project.

In March of 2013, the City of Aliso Viejo sent a public notice of an April 3, 2013 City Council meeting to consider adoption of this revised Housing Element for the 2008-2014 period, approval of an Addendum to the 2004 General Plan EIR, and General Plan and zone change amendments for 2C Liberty and 4 Orion. The item was subsequently continued, and the ensuing meeting was canceled due to lack of a quorum. However, the City received a substantial amount of opposition communicated via letters to the City, emails to staff and City Council members, letters to local newspapers, and public comments at the April and May City Council meetings regarding 4 Orion.

On April 1, 2013, a public workshop for the 5th cycle planning period was held in the City Council Chambers. Notification for the workshop included a one-eighth page newspaper display ad in the local newspaper; E-News announcement to approximately 2,400 subscribers; posting on the City’s website; posting at City Hall, the Library, and the Orange County Sherriff’s Department; direct U.S. Mail to groups with an interest in housing issues, such as the Orange County Association of Realtors, the Regional Center of Orange County, Shea Homes, Shea Properties, the Kennedy Commission, the Public Law Center, the Orange County Chapter of the Building Industry Association, Aliso Viejo Community Association, as well as 104 community associations within Aliso Viejo. The City’s Housing Element Consultant gave a presentation including a slide show to 14
people. Several questions were asked of the Consultant and Staff, and those attending were asked to respond to a questionnaire. The slide show presentation included the following topics:

- Overview of the Housing Element;
- Key Housing Element requirements;
- Regional Housing Needs Assessment (RHNA) 2014 – 2021;
- Income categories;
- What does affordable housing look like;
- Who needs affordable housing;
- RHNA Allocation 2014 - 2021;
- Current City policies; and
- Next steps.

In response to the comments received for the 4th cycle Housing Element which had yet to be adopted, the City held a community meeting on May 2 to further understand the public’s concerns. On May 15 a City Council Ad Hoc Committee that was established for the Vantis Community Benefit Overlay was expanded to also include review of housing opportunities in addition to 4 Orion. On June 8, 2013 the City held a public meeting field trip at the property located at 4 Orion and adjacent property owners. On June 19, the Ad Hoc Committee recommended that City staff do the following:

- Continue the current application process for senior affordable housing at 2C Liberty.
- Exclude the 4 Orion property from the City’s Housing Element submittal to HCD.
- Include a portion of the USPS property in the City’s Housing Element submittal to HCD as a partial site available for affordable housing at this time.
- Evaluate the revised Housing Element in accordance with CEQA regulations.
- Continue working with Shea Properties regarding affordable housing obligations currently on the Vantis project and potential removal of deed restrictions on Shea-controlled properties in the City.

Following the Ad Hoc Committee’s recommendation on June 19, the City Council concurred to approve the Committee’s five recommendations.

On October 16, 2013, the City conducted a public hearing for the 5th cycle Housing Element and submitted it to the State of California Housing and Community Development Department for review the next day.

On January 22, 2014 the City Council conducted a public hearing and adopted this Housing Element.
On October 1, 2014 a letter was issued by HCD stating that the adopted Housing Element is in compliance with state law.
ISSUES, GOALS, AND POLICIES

The goals, policies, and implementation programs of the Housing Element address three Citywide issues:

1) Providing opportunities for a variety of housing;
2) Maintaining quality neighborhoods and housing units that meet the needs of all income groups; and
3) Assisting special needs households and ensuring fair housing practices.

VARIETY OF HOUSING OPPORTUNITIES

Housing needs vary depending on many factors, such as age, income, family type, household size, and mobility. A well-balanced community includes a variety of housing options. Providing a range of housing opportunities helps ensure that households of all types and sizes can find a home in Aliso Viejo that suits their needs.

Goal H-1 Encourage a diversity of housing types and provide affordability levels within Aliso Viejo to meet the needs of community residents.

Policy H-1.1 Identify sites appropriate for the development of a variety of housing types and price ranges to meet the needs of all socioeconomic segments of the community through the disbursement of affordable units in projects.

Policy H-1.2 Encourage through the use of density bonuses and rezoning to allow for residential development, development of affordable housing opportunities throughout the community, as well as development of housing for elderly and low- and moderate-income households near public transportation services.

Policy H-1.3 Identify physical, legal, economic, and other constraints to the development of housing and collaborate with other public and private agencies to overcome such factors.

Policy H-1.4 Ensure that a portion of future residential development is affordable to low- and very-low-income households by designating certain vacant sites as having the potential to be used for residential uses.
Policy H-1.5  Encourage development of mixed-use neighborhoods that incorporate all levels of housing with commercial and business park development in existing and future developments.

HOUSING AND NEIGHBORHOOD PRESERVATION

Housing and neighborhood preservation addresses two important issues: 1) improving the condition of Aliso Viejo’s residential stock and neighborhoods; and 2) maintaining the supply of affordable housing. The first aspect of housing and neighborhood preservation is to provide a safe and aesthetically pleasing living environment. Improving the character of Aliso Viejo’s neighborhoods also influences property values and overall quality of life. The other aspect of housing and neighborhood preservation is ensuring that access to affordable housing opportunities for lower-income households is provided throughout the community.

Goal H-2  Create safe and aesthetically pleasing neighborhoods, and provide adequate housing to meet the needs of all household types and income groups.

Policy H-2.1  As the City matures, maintain the quality of the housing stock through code enforcement as well as appropriate coordination with homeowner associations with regards to on-street parking, landscape maintenance, and water quality.

Policy H-2.2  Promote increased awareness of the importance of property maintenance to long-term housing quality and property values, and encourage community and neighborhood involvement in neighborhood preservation through public information and awareness, the Aliso Viejo Community Association (AVCA), City newsletters, e-news, cable television, and informational brochures at the public counter at City Hall.

Policy H-2.3  Work to preserve the affordability of publicly assisted and privately-financed housing units and to discourage their conversion to market-rate housing by requiring condominium conversions to provide very-low- and low-income units, with a focus on units that currently are or were previously affordable units that may have expired or are at risk of expiring.
EQUAL ACCESS TO HOUSING

Special circumstances may impede some persons and households from finding decent, affordable housing. The City has a responsibility to ensure that all persons have access to housing, regardless of race, religion, gender, familial status, marital status, national origin, color, age, disability, or source of income. To ensure that all groups have equal access to housing, the City should ensure the continuation of unimpeded access to a full range of housing opportunities.

Goal H-3  Ensure that all persons and household types have equal access to housing.

Policy H-3.1  Identify and participate in programs and provide incentives through density bonuses and rezoning to encourage residential projects that include housing for seniors, low- and moderate-income groups, or special needs groups.

Policy H-3.2  Encourage the provision of housing and services for special needs groups, such as the homeless, the disabled, and victims of domestic violence by providing City grants to agencies providing services to persons in these groups.

Policy H-3.3  Collaborate with developers, landlords, home-seekers, tenants, real estate and lender groups, and other private for-profit and non-profit agencies to ensure that individuals and families seeking housing in Aliso Viejo are not discriminated against.

Policy H-3.4  Maintain a variety of housing types that complement the employment opportunities within the community and encourage a jobs/housing balance, provided that the City’s long-range fiscal land use objectives are met.
HOUSING PROGRAMS

This Housing Plan identifies specific action programs the City will implement to further its housing goals and policies during the 2013-2021 planning period. The programs, arranged under four headings and presented in numerical order, are designed to accomplish the following:

- Identify adequate sites to maintain a variety of housing opportunities;
- Conserve and improve the existing housing stock;
- Facilitate the development and maintenance of affordable housing;
- Address and remove unnecessary governmental constraints; and
- Ensure equal housing opportunity.

HOUSING POLICY MAP

The Housing Policy Map (Figure H-1) depicts the locations having potential for future housing development during this planning period (see also Appendix C, Table CP-21 and Housing Program 1, Adequate Sites for Affordable Housing).

VARIETY OF HOUSING OPPORTUNITIES

1. **Adequate Sites for Affordable Housing**

   Aliso Viejo’s share of the region’s new housing need for the 2013-2021 planning period as established by the Southern California Association of Governments (SCAG) in the Regional Housing Needs Assessment (RHNA) is 39 units (Appendix C, Table CP-20). Of these, 9 units are designated for very-low-income households, 7 are for low-income households, 7 are for moderate-income households, and 16 are for above-moderate-income households. In addition, the City has a carryover of unaccommodated need of 201 very-low-income units and 73 low-income units, as discussed in the Community Profile (Table CP-21).

   State law requires cities to identify adequate sites with appropriate zoning to accommodate the growth need for the planning period. In compliance with the requirements of state law, the City will carry out the actions described below in order to identify adequate sites commensurate with its unmet housing need during the planning period.
Figure H-1
Housing Policy Map

ALISO VIEJO GENERAL PLAN
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Within the first year of the planning period, the City will process an amendment to the General Plan and zoning designations for sites located at 4 Liberty and 2C Liberty to accommodate at least 249 lower-income housing units. 2C Liberty shall be redesignated for exclusive residential development with a minimum density of 30 units per acre and a maximum density of 50 units per acre, and a 4-acre portion of the 4 Liberty site shall be redesignated for exclusive residential development with a minimum density of 30 units per acre and a maximum density of 50 units per acre. The rezoned sites shall comply with Government Code §65583.2.h and §65583.2.i.

Staff will provide assistance to applicants during the design review process.

The City will facilitate affordable multi-family development on these sites by supporting funding applications, allocating funds from the Affordable Housing Trust Fund, and/or approving modifications to development standards.

The City will report annually to the California Department of Housing and Community Development on its progress in implementing this program.

The City will monitor project approvals and comply with the no net loss requirements of Government Code Sec. 65863. No zoning amendment or project approval shall reduce the residential density or allow development of any parcel at a lower residential density than assumed in Table CP-23 of the Housing Element Community Profile unless the City makes written findings in accordance with Sec. 65863(b).

Responsible Agency:  Planning Department
Funding Source:   General Fund

2. Affordable Housing In-Lieu Funds

To date, the City has collected approximately $2 million in affordable housing in-lieu funds. The majority of the existing funds are from the Canyon Point condo conversion. The remaining balance is from a 12-unit CBO project, Ventana Ridge, as well as a small percentage from the Glenwood and Vantis CBO projects.

Within the first year of the planning period, the City will hire a qualified housing consultant to develop recommendations for the best use of the in-lieu funds, with the priority of extremely-low and very-low-income housing. The
City will devise a plan to distribute the existing funds, as well as the balance of the anticipated funds collected with the Vantis Development Agreement.

The priority for the use of in-lieu funds will be to assist the provision of extremely-low- and very-low-income rental housing, which may include purchasing affordability covenants on existing rental units and/or providing incentives to non-profit developers of rental housing. The City Council will make available the funds to qualified participants within two years from the adoption of the Housing Element. These funds could also be utilized to retain affordable status on units that may require City intervention and the associated administrative costs.

Responsible Agency: Planning Department  
Funding Source: In-Lieu Housing Fund

3. **Homeownership Assistance Programs**

The City recognizes the importance of providing homeownership opportunities for lower- and moderate-income households.

The City will investigate the availability of homeownership programs that are supported by outside agencies and make this information available to prospective homeowners in Aliso Viejo. Such programs may include the Mortgage Credit Certificates, California Housing Finance Agency, mortgage revenue bonds, CDBG, and HOME.

The City will investigate the feasibility of developing its own homeownership assistance program with the use of in-lieu funds (see Program 2).

Timeframe: Annual updates to information posted on the City website  
Responsible Agency: Planning Department  
Funding Source: General Fund; homebuyer assistance programs  
Program Objective: Provide home buyer assistance information to potential homeowners in Aliso Viejo.

4. **Section 8 Housing Choice Vouchers**

The Section 8 Housing Choice Vouchers program extends rental subsidies to very-low-income households and seniors who spend more than 30 percent of their income on rent. The amount of subsidy is equal to the difference between the excess of 30 percent of monthly income and actual rent. The program is administered by the Orange County Housing Authority (OCHA). The City will provide information regarding the Section 8 program on the City website and other locations in the City.
Timeframe: Throughout the planning period
Responsible Agency: Orange County Housing Authority
Funding Source: HUD Section 8 funds
Program Objective: The City will continue to promote the use of Section 8 Housing Choice Vouchers in Aliso Viejo with the objective of expanding assistance to very-low-income households. Specifically, the City will make referrals to OCHA, advertise the program on the City website and in newsletters, and distribute information at the public counter at City Hall.

5. **OCHA Special Needs Groups Rental Assistance Program**

In addition to the Section 8 Housing Choice Vouchers program, the Orange County Housing Authority (OCHA) administers rental assistance programs targeting special needs groups, including families whose children are at risk of being placed in out-of-home care, disabled persons, homeless, and seniors. These programs include:

- **Family Unification:** This program provides Section 8 assistance to families whose children are at risk of being placed in out-of-home care or delayed in returning from care because of the families' inadequate housing.

- **Aftercare for Disabled:** This program provides Section 8 assistance specifically for disabled applicants.

- **Shelter Plus Care:** This program provides Section 8 assistance to homeless persons with disabilities.

- **HOPE IV - Elderly Independence:** This program provides Section 8 assistance to frail seniors.

The City will continue to promote these assistance programs on the City website and other locations in the City.

Responsible Agency: Planning Department
Timeframe: Throughout the planning period
Funding Source: General Fund
Program Objective: The City will continue to assist OCHA in promoting its Special Needs Groups Rental Assistance Programs in Aliso Viejo with the objective of expanding assistance to additional households with special needs. Specifically, the City will make referrals to OCHA, advertise the program on City website and
6. **City Grants for Special Needs Groups**

The City currently provides local community assistance grants for human and social service groups, including domestic violence shelters and homelessness prevention. Since 2005, the City has provided $13,500 in grants to Laura’s House, a state-approved comprehensive domestic violence agency serving over 840,000 residents in 17 communities within South Orange County. Their target population is battered women and children who are coping with the effects of domestic violence, needing emergency shelter, support, education and counseling. The City has also provided a total of $29,430 in community assistance grant funding to South County Outreach (SCO). SCO provides services that include a three or four day supply of free food along with rental and utility bill financial assistance to Aliso Viejo individuals and families consisting of seniors, youth, children, the disabled, unemployed and those in crisis.

In addition, the City also provides non-competitive grants to after-school and senior programs. Since 2003, the City has provided Age Well Senior Services (formerly South County Senior Services), who provides adult day care for older adults with multiple chronic illnesses, with $23,900 in grant funding.

On an annual basis, the City solicits community assistance grant applications from a variety of local non-profit service based organizations and the allocation of funding fluctuates depending on City budgetary constraints.

<table>
<thead>
<tr>
<th>Timeframe:</th>
<th>Throughout the planning period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsible Agency:</td>
<td>Community Services Department</td>
</tr>
<tr>
<td>Funding Source:</td>
<td>General Fund</td>
</tr>
<tr>
<td>Program Objective:</td>
<td>The City will allocate 50% of its Human and Social Services community assistance grant budget to incorporate homelessness prevention programs, programs for the disabled, and domestic violence support programs into the annual cycle of grant funding.</td>
</tr>
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</table>

**HOUSING AND NEIGHBORHOOD PRESERVATION**

7. **Code Enforcement**

The Code Enforcement Program is operated through the City’s Building Department. Code Enforcement staff responds to complaints related to substandard housing, property maintenance, overgrown vegetation, trash and
debris, improper occupancy, and other nuisance and zoning complaints. In addition, the City will continue to implement and enforce the most recent provisions of the California Building Code.

Timeframe: Throughout the planning period
Responsible Agency: Building Department, Code Enforcement Division
Funding Source: General Fund
Program Objective: The City’s Code Enforcement Staff will continue to enforce property maintenance standards and adopted City Building and Zoning codes. The City will promote the importance of property maintenance to long-term housing quality and property values, and encourage community and neighborhood involvement in neighborhood preservation through the Aliso Viejo Community Association (AVCA), City newsletters, e-news, cable television, and informational brochures at the public counter at City Hall. As opportunities become available, the City will consider funneling resources into home rehabilitation.

8. Conservation of Existing and Future Affordable Units

Aliso Viejo has two multi-family housing projects with units affordable to households earning lower incomes. Neither one is at risk of converting to market-rate housing during this Housing Element period as the shortest deed restriction at these two locations is not due to expire until 2031. Should there be a change in the status of these housing projects, the City will monitor the deed restrictions or affordability covenants of affordable housing and pursue options to preserve the affordable housing units.

Furthermore, 43 of the 43 low-income units within the Glenwood development and 15 of the 35 low-income units within the Vantis development have been constructed to date. As the units are constructed and sold to low-income buyers, the City will monitor the deed restrictions on those units. There is a 45-year affordability restriction on those units.

Program Objective: Annually, the City will monitor the status, notify residents of potential conversion to market rate housing, and pursue options to preserve the units.

Timeframe: Throughout the planning period
Responsible Agency: Planning Department
Funding Source: General Fund
Program Objective: Annually, the City will monitor the status, notify residents of potential conversion to market rate housing, and pursue options to preserve the units.
9. **Streamlined Residential Permit Processing**

In order to facilitate affordable housing development, the City will offer streamlined priority processing for applications that include affordable units. Assistance will include pre-filing meetings to clarify application requirements, expedited review of application materials, and administrative assistance with grant funding applications.

- **Timeframe:** Throughout the planning period
- **Responsible Agency:** Planning Department
- **Funding Source:** General Fund
- **Program Objective:** Minimize permit processing time to reduce development costs for affordable housing.

10. **Fair Housing Services**

As an Urban Participating City with the County of Orange, Aliso Viejo receives fair housing services from Fair Housing Council of Orange County (FHCOC). FHCOC services are directed to promote housing opportunities for all persons regardless of race, religion, sex, family size, marital status, ancestry, national origin, color, or disability.

- **Timeframe:** Throughout the planning period
- **Responsible Agency:** Planning Department
- **Funding Source:** County Housing Funds
- **Program Objective:** The City will continue to contract to support fair housing services for City residents. The City will advertise fair housing services on its website and at the public counter at City Hall, library, post office, and other community locations.
ENERGY CONSERVATION

11. **Encourage Energy Conservation**

The Zoning Ordinance will be amended to add a Green Building Program that offers incentives such as expedited processing and/or fee waivers when project proponents agree to incorporate environmentally sensitive sustainable and energy efficient construction techniques into their projects. Expedited permit processing will apply to all building permits for solar voltaic, solar thermal systems, tankless water heaters, windows and/or doors containing glass, high-efficiency heating, ventilation, and air conditioning (HVAC) systems. Furthermore, a Solar Energy Education Program will be developed to compliment the Green Building Program. The program will encourage use of passive solar systems in new and rehabilitated residential construction to improve energy efficiency of housing units. Daytime interior lighting costs can be significantly reduced or eliminated with the use of properly designed and located skylights. Skylights can be easily installed at reasonable expense in existing houses, thereby substantially reducing electricity costs and energy consumption. Solar energy is a practical, cost effective, and environmentally sound way to heat and cool a home. Lastly, the amendment will include the Ahwahnee Principles for Resource-Efficient Communities, which describe housing and community design techniques to maximize efficient use of resources. Other opportunities for energy conservation in Aliso Viejo include continued implementation of State Title 24 building construction standards, complying with Energy Star conservation standards, and considering appropriate building orientation and landscaping during the development/design review process through implementation of the Zoning Ordinance.

**Timeframe:** Ordinance amendment in 2014  
**Responsible Agency:** Planning Department  
**Funding Source:** General Fund  
**Program Objective:** Amend zoning regulations to encourage energy conservation.
QUANTIFIED HOUSING OBJECTIVES

The City’s objectives for new housing construction, rehabilitation, and conservation for the 2013-2021 planning period are summarized in Table H-1.

Table H-1
Quantified Objectives – 2013-2021

<table>
<thead>
<tr>
<th>Program Category</th>
<th>Extremely Low</th>
<th>Very Low</th>
<th>Low</th>
<th>Mod</th>
<th>Upper</th>
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<td>-</td>
<td>-</td>
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<td>-</td>
<td>0</td>
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<tr>
<td>Conservation b</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>56</td>
</tr>
</tbody>
</table>

a Quantified objective for new construction is for the period 2013-2021 per the RHNA
b Reflects Section 8 vouchers. There are no assisted units at risk during this planning period.