

FACILITY RESERVE STUDY

ASSESSMENT

CITY OF GOLETA

130 Cremona Drive, Suite B

Goleta, California 93117

Robert Morgenstern



FACILITY RESERVE STUDY

of

RANCHO LA PATERA AND STOW HOUSE

304 North Los Carneros Road

Goleta, California 93117

PREPARED BY:

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Date of Report: September 1, 2010
On-site Date: April 27, 2010

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Immediate Repairs Report
Rancho La Patera
9/1/2010


| Report Section | ID | Cost Description | Quantity | Unit | Unit Cost | Subtotal | Deficiency Repair Estimate * |
|--------------------------------|-------|--|----------|------|-------------|----------|------------------------------|
| 3.2 | 37755 | Measured ADA Study of Property | 1 | EA | \$5,500.00 | \$5,500 | \$6,171 |
| 3.2 | 37760 | ADA, install/replace signage giving direction to accessible entrance | 3 | Sign | \$106.36 | \$319 | \$358 |
| 3.2 | 37831 | New 44-inch wide concrete sidewalk | 300 | LF | \$29.03 | \$8,709 | \$9,771 |
| 3.2 | 37829 | ADA, install new wood H/C access ramp, 4' wide, railings both sides | 30 | LF | \$638.00 | \$19,140 | \$21,475 |
| 5.3 | 37756 | Civil Engineer Drainage study | 1 | EA | \$2,500.00 | \$2,500 | \$2,805 |
| 5.3 | 37837 | Drainage correction allowance | 1 | Each | \$5,000.00 | \$5,000 | \$5,610 |
| 6.1 | 37757 | Follow-up Review by a Structural Engineer | 1 | EA | \$4,500.00 | \$4,500 | \$5,049 |
| 6.1 | 37838 | Correct foundation anchorage | 1 | Each | \$15,000.00 | \$15,000 | \$16,830 |
| 6.3 | 37840 | Attic ventilation, provide to meet code | 1 | Each | \$5,000.00 | \$5,000 | \$5,610 |
| 6.3 | 37912 | Blown in Cellulose Attic Insulation R-30 | 3200 | SF | \$1.33 | \$4,256 | \$4,775 |
| 6.4 | 37835 | Historic decorative wood trim, patch & paint, ground floor | 200 | LF | \$11.61 | \$2,322 | \$2,605 |
| 6.4 | 37834 | Historic decorative wood trim, patch and paint, second floor | 400 | LF | \$13.17 | \$5,268 | \$5,911 |
| Immediate Repairs Total | | | | | | | \$86,971 |

* Location Factor (1.122) included in totals.

Replacement Reserves Report
Rancho La Patera
 9/1/2010



| Report Section | ID | Cost Description | Lifespan (EUL) | Observed Age (EAge) | Remaining Life (RUL) | Quantity | Unit | Unit Cost | Subtotal | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Deficiency Repair Estimate |
|--|-------|---|----------------|---------------------|----------------------|----------|----------|-------------|----------|----------|-----------|----------|----------|-------|-------|----------|------|----------|----------|-------|----------|------|----------|------|----------|----------|------|------|------|----------------------------|
| 3.2 | 37755 | Measured ADA Study of Property | 0 | 0 | 0 | 1 | EA | \$5,500.00 | \$5,500 | \$5,500 | | | | | | | | | | | | | | | | | | | | \$5,500 |
| 3.2 | 37760 | ADA, install/replace signage giving direction to accessible entrance | 0 | 0 | 0 | 3 | Sign | \$106.36 | \$319 | \$319 | | | | | | | | | | | | | | | | | | | | \$319 |
| 3.2 | 37759 | ADA, paint van-accessible space with signage | 5 | 0 | 5 | 1 | EA | \$220.00 | \$220 | | | | | \$220 | | | | | \$220 | | | | | | \$220 | | | | | \$660 |
| 3.2 | 37831 | New 44-inch wide concrete sidewalk | 25 | 25 | 0 | 300 | LF | \$29.03 | \$8,709 | \$8,709 | | | | | | | | | | | | | | | | | | | | \$8,709 |
| 3.2 | 37829 | ADA, install new wood H/C access ramp, 4' wide, railings both sides | 0 | 0 | 0 | 30 | LF | \$638.00 | \$19,140 | \$19,140 | | | | | | | | | | | | | | | | | | | | \$19,140 |
| 5.2 | 38278 | Repair and Seal Coat asphalt | 5 | 4 | 1 | 3.6 | 10000 SF | \$7,642.00 | \$27,511 | | \$27,511 | | | | | \$27,511 | | | \$27,511 | | | | | | \$27,511 | | | | | \$110,045 |
| 5.2 | 38273 | Roadway grading and asphalt, new | 20 | 18 | 2 | 400 | SY | \$40.37 | \$16,148 | | | \$16,148 | | | | | | | | | | | | | | | | | | \$16,148 |
| 5.2 | 37748 | Cut & Patch asphalt | 10 | 9 | 1 | 500 | SF | \$2.39 | \$1,195 | | \$1,195 | | | | | | | | \$1,195 | | | | | | | | | | | \$2,390 |
| 5.2 | 38279 | Auto gate at new Service Road | 20 | 18 | 2 | 1 | EA | \$3,750.00 | \$3,750 | | | \$3,750 | | | | | | | | | | | | | | | | | | \$3,750 |
| 5.3 | 37756 | Civil Engineer Drainage study | 0 | 0 | 0 | 1 | EA | \$2,500.00 | \$2,500 | \$2,500 | | | | | | | | | | | | | | | | | | | | \$2,500 |
| 5.3 | 37837 | Drainage correction allowance | 0 | 0 | 0 | 1 | Each | \$5,000.00 | \$5,000 | \$5,000 | | | | | | | | | | | | | | | | | | | | \$5,000 |
| 6.1 | 37757 | Follow-up Review by a Structural Engineer | 0 | 0 | 0 | 1 | EA | \$4,500.00 | \$4,500 | \$4,500 | | | | | | | | | | | | | | | | | | | | \$4,500 |
| 6.1 | 37838 | Correct foundation anchorage | 0 | 0 | 0 | 1 | Each | \$15,000.00 | \$15,000 | \$15,000 | | | | | | | | | | | | | | | | | | | | \$15,000 |
| 6.3 | 37840 | Attic ventilation, provide to meet code | 0 | 0 | 0 | 1 | Each | \$5,000.00 | \$5,000 | \$5,000 | | | | | | | | | | | | | | | | | | | | \$5,000 |
| 6.3 | 37833 | Wood shingle roofing, replace | 25 | 24 | 1 | 30 | SQ | \$2,833.00 | \$84,990 | | \$84,990 | | | | | | | | | | | | | | | | | | | \$84,990 |
| 6.3 | 37750 | Built-up roofing, total roof replacement | 20 | 19 | 1 | 3 | SQ | \$735.87 | \$2,208 | | \$2,208 | | | | | | | | | | | | | | | | | | | \$2,208 |
| 6.3 | 37912 | Blown in Cellulose Attic Insulation R-30 | 40 | 40 | 0 | 3200 | SF | \$1.33 | \$4,256 | \$4,256 | | | | | | | | | | | | | | | | | | | | \$4,256 |
| 6.4 | 37753 | Paint existing wood siding, one coat, spray with medium prep and clean up | 10 | 9 | 1 | 6500 | SF | \$1.24 | \$8,060 | | \$8,060 | | | | | | | | \$8,060 | | | | | | | | | | | \$16,120 |
| 6.4 | 37754 | Paint existing wood siding, one coat, spray with medium prep and clean up | 10 | 7 | 3 | 6500 | SF | \$1.50 | \$9,750 | | | \$9,750 | | | | | | | | | \$9,750 | | | | | | | | | \$19,500 |
| 6.4 | 37835 | Historic decorative wood trim, patch & paint, ground floor | 8 | 8 | 0 | 200 | LF | \$11.61 | \$2,322 | \$2,322 | | | | | | | | \$2,322 | | | | | | | | \$2,322 | | | | \$6,966 |
| 6.4 | 37834 | Historic decorative wood trim, patch and paint, second floor | 8 | 8 | 0 | 400 | LF | \$13.17 | \$5,268 | \$5,268 | | | | | | | | \$5,268 | | | | | | | | \$5,268 | | | | \$15,804 |
| 6.6 | 37836 | Historic wood window patch, repair and paint | 15 | 14 | 1 | 52 | Each | \$238.87 | \$12,421 | | \$12,421 | | | | | | | | | | | | | | | \$12,421 | | | | \$24,842 |
| Totals, Unescalated | | | | | | | | | | \$77,514 | \$136,385 | \$19,898 | \$9,750 | \$0 | \$220 | \$27,511 | \$0 | \$7,590 | \$0 | \$220 | \$36,766 | \$0 | \$9,750 | \$0 | \$220 | \$47,522 | \$0 | \$0 | \$0 | \$373,347 |
| Location Factor (1.12) | | | | | | | | | | \$9,457 | \$16,639 | \$2,428 | \$1,190 | \$0 | \$27 | \$3,356 | \$0 | \$926 | \$0 | \$27 | \$4,485 | \$0 | \$1,190 | \$0 | \$27 | \$5,798 | \$0 | \$0 | \$0 | \$45,548 |
| Totals, Escalated (3.0%, compounded annually) | | | | | | | | | | \$86,971 | \$157,615 | \$23,685 | \$11,954 | \$0 | \$286 | \$36,857 | \$0 | \$10,788 | \$0 | \$332 | \$57,102 | \$0 | \$16,065 | \$0 | \$385 | \$85,563 | \$0 | \$0 | \$0 | \$487,603 |

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CERTIFICATION

The City of Goleta retained EMG to perform this Facility Reserve Study (FRS) in connection with developing a Capital Expenditures Budget for the Rancho La Patera, 304 North Los Carneros Road, Goleta, California, the "Property". It is our understanding that the primary interest of Goleta is to locate and evaluate materials and building system defects that might significantly affect the value of the property and to determine if the present Property has conditions that will have a significant impact on its continued operations.

It is our understanding that EMG will evaluate the Property's building systems and components noting obvious visual defects and evaluating the life cycle of building materials. EMG will develop cost estimates to complete discussed repairs and/or replacements during the evaluation term.

The conclusions and recommendations presented in this report are based on the brief review of the plans and records made available to our Project Manager during the site visit, interviews of available property management personnel and maintenance contractors familiar with the Property, appropriate inquiry of municipal authorities, our Project Manager's walk-through observations during the site visit, and our experience with similar properties.

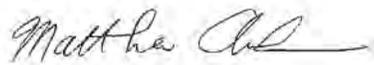
No testing, exploratory probing, dismantling or operating of equipment or in depth studies were performed unless specifically required under Section 2 of this report. This assessment did not include engineering calculations to determine the adequacy of the Property's original design or existing systems. Although walk-through observations were performed, not all areas were observed (See Section 4.1 for areas observed). There may be defects in the Property, which were in areas not observed or readily accessible, may not have been visible, or were not disclosed by management personnel when questioned. The report describes property conditions at the time that the observations and research were conducted.

This report has been prepared on behalf of and exclusively for the use of the City of Goleta for the purpose stated within Section 2 of this report. The report, or any excerpt thereof, shall not be used by any party other than the City of Goleta or for any other purpose than that specifically stated in our agreement or within Section 2 of this report without the express written consent of EMG.

Any reuse or distribution of this report without such consent shall be at the City of Goleta and the recipient's sole risk, without liability to EMG.

Prepared by: Arthur Balourdas, Project Manager

Reviewed by:



Matthew Anderson
Program Manager

1. EXECUTIVE SUMMARY

1.1. PROPERTY INFORMATION AND GENERAL PHYSICAL CONDITION

The property information is summarized in the table below. More detailed descriptions may be found in the various sections of the report and in the Appendices.

| Property Information | |
|------------------------------------|--|
| Address: | 304 North Los Carneros Road Goleta, California 93117 |
| Year constructed: | Stow House: 1873, Various renovations and additions up until the 1960s. Caretaker's Residence: circa 1920, moved to present location around 1970. Various renovations, bathroom 2007, kitchen 2008, Bunk House: circa 1885, moved and bottom floor added circa 1920, renovated 2006-7. Garage: circa 1920, renovated 2006-2007. Packing Shed: circa 1900, renovated 2006-2007. |
| City Department: | Public Works |
| Site area: | 40 Acres |
| Gross floor area: | 12,960 Square Feet |
| Number of buildings: | Five |
| Number of stories: | One and two |
| Parking type and number of spaces: | 48 spaces in open lot. |
| Building construction: | Garage and Bunk House: Conventional wood frame structure on concrete slab. Caretaker's Residence, Stow House and Packing Shed: Conventional wood frame structure with raised floor. |
| Roof construction: | Stow House: Gabled and hip roofs with shake shingles, flat with built-up roofing. Caretaker's Residence, Bunk House, Garage and Packing Shed: Gabled with shake shingles. |
| Exterior Finishes: | Painted wood siding. |
| Heating and/or Air-conditioning: | Stow House, Bunk House and Garage: Split system gas furnaces and pad-mounted condensers. Caretaker's Residence: Gas-fired gravity wall heater. Packing Shed: Package attic unit. |
| Fire and Life/Safety: | Hydrants, smoke detectors, alarms, extinguishers. |

| Property Information | |
|------------------------------------|------------------------------------|
| Dates of visit: | April 27, 2010 |
| Point of Contact (POC): | James Morgenstern |
| Assessment and Report Prepared by: | Arthur Balourdass |
| Reviewed by: | Mathew Anderson Program Manager |

Generally, the property appears to have been constructed within industry standards in force at the time of construction. The property appears to have been well maintained in recent years and is in good overall condition with the exception of the exterior of the Stow House which is in fair condition.

According to property management personnel, the property has had an active capital improvement expenditure program over the past three years, primarily consisting of complete renovation of some of the buildings including, handicapped accessibility improvements, foundations, roofs, windows and screens, interior finishes, HVAC systems, electrical, plumbing, and sanitary lines. Supporting documentation was not provided in support of these claims but most of the work is evident.

1.2. SPECIAL ISSUES AND FOLLOW-UP RECOMMENDATIONS

As part of the FRS, a limited assessment of accessible areas of the building(s) was performed to determine the presence of mold, conditions conducive to mold growth, and/or evidence of moisture. Property personnel were interviewed concerning any known or suspected mold, elevated relative humidity, water intrusion, or mildew-like odors. Sampling is not a part of this assessment.

There is visible evidence of isolated areas of moisture intrusion at the first floor living room bay window ceiling beam and at the second floor ceilings in the Stow House. The area of staining totals approximately 20 square feet of ceiling area.

The moisture appears to be the result of window and roof leaks. Although the presence of mold was not apparent, the possibility of mold growth as a result of the moisture intrusion is possible. The presence of mold in exterior and interior environments is normal and unavoidable. Exposure to mold or mold producing materials can be hazardous and should be avoided. The presence of mold does not necessarily constitute an exposure. This assessment does not constitute a comprehensive mold survey of the Project, and any conclusions are based solely on conditions readily observable in accessed areas.

The following studies are recommended.

- As part of the review, a limited visual observation for ADA accessibility compliance was conducted. The limited visual observation determined that handicapped accessibility issues outside the scope of this study may exist at the property. For a more detailed measured report on the buildings, a consultant should be retained to analyze the existing condition, provide recommendations and, if necessary, estimate the scope and cost of any required improvements. Refer to Section 3.2 for discussion and costs.
- The drainage at the service drive is in poor condition. An architect or engineer should be retained to analyze the existing condition, provide recommendations and, if necessary, estimate the scope and cost of any required repairs. Refer to Section 5.3 for discussion and costs.

- At the Stow House it appears that framing to foundation connections are inadequate and there is wood to earth contact at the interior cripple walls. Some of the foundation posts have shifted and are not completely bearing on their footings. In addition, according to the staff moisture is evident in the attic of the Stow House. An architect or engineer must be retained to analyze the existing conditions, provide recommendations and, if necessary, estimate the scope and cost of any required repairs. See Sections 6.1 and 6.3 for discussion and costs.
- At the Stow House there is significant evidence of exterior wood trim deterioration due to wood pecker activity at the Stow House. A local, licensed pest control contractor should be retained to treat the property as required to eliminate the threat. See section 6.4 for discussion and costs.

1.3. OPINIONS OF PROBABLE COST

Cost estimates are attached at the front of this report (following the cover page).

These estimates are based on Invoice or Bid Document/s provided either by the Owner/facility and construction costs developed by construction resources such as *R.S. Means* and *Marshall & Swift*, EMG's experience with past costs for similar properties, city cost indexes, and assumptions regarding future economic conditions.

1.3.1. Methodology

Based upon-site observations, research, and judgment, along with referencing Expected Useful Life (EUL) tables from various industry sources, EMG opines as to when a system or component will most probably necessitate replacement. Accurate historical replacement records, if provided, are typically the best source of information. Exposure to the elements, initial quality and installation, extent of use, the quality and amount of preventive maintenance exercised, etc., are all factors that impact the effective age of a system or component. As a result, a system or component may have an effective age that is greater or less than its actual chronological age. The Remaining Useful Life (RUL) of a component or system equals the EUL less its effective age. Projections of Remaining Useful Life (RUL) are based on continued use of the Property similar to the reported past use. Significant changes in tenants and/or usage may affect the service life of some systems or components.

Where quantities could not be derived from an actual take-off, lump sum costs or allowances are used. Estimated costs are based on professional judgment and the probable or actual extent of the observed defect, inclusive of the cost to design, procure, construct and manage the corrections.

1.3.2. Immediate Repairs

Immediate repairs are opinions of probable costs that require immediate action as a result of: (1) material existing or potential unsafe conditions, (2) material building or fire code violations, or (3) conditions that, if not addressed, have the potential to result in, or contribute to, critical element or system failure within one year or will most probably result in a significant escalation of its remedial cost.

1.3.3. Replacement Reserves

Replacement Reserves are for recurring probable expenditures, which are not classified as operation or maintenance expenses. The replacement reserves should be budgeted for in advance on an annual basis. Replacement Reserves are reasonably predictable both in terms of frequency and cost. However, Replacement Reserves may also include components or systems that have an indeterminable life but, nonetheless, have a potential for failure within an estimated time period.

Replacement Reserves exclude systems or components that are estimated to expire after the reserve term and are not considered material to the structural and mechanical integrity of the subject property. Furthermore, systems and components that are not deemed to have a material effect on the use of the Property are also excluded. Costs that are caused by acts of God, accidents, or other occurrences that are typically covered by insurance, rather than reserved for, are also excluded.

Replacement costs are solicited from ownership/property management, EMG's discussions with service companies, manufacturers' representatives, and previous experience in preparing such schedules for other similar facilities. Costs for work performed by the ownership's or property management's maintenance staff are also considered.

EMG's reserve methodology involves identification and quantification of those systems or components requiring capital reserve funds within the assessment period. The assessment period is defined as the effective age plus the reserve term. Additional information concerning system's or component's respective replacement costs (in today's dollars), typical expected useful lives, and remaining useful lives were estimated so that a funding schedule could be prepared. The Replacement Reserves Schedule presupposes that all required remedial work has been performed or that monies for remediation have been budgeted for items defined in the Immediate Repair and Short Term Cost Estimate.

2. PURPOSE AND SCOPE

2.1. PURPOSE

EMG was retained by the client to render an opinion as to the Property's current general physical condition on the day of the site visit.

Based on the observations, interviews and document review outlined below, this report identifies significant deferred maintenance issues, existing deficiencies, and material code violations of record at municipal offices that affect the Property's use. Opinions are rendered as to its structural integrity, building system condition and the Property's overall condition. The report also notes building systems or components that have realized or exceeded their typical expected useful lives.

The physical condition of building components is typically defined as being in one of three categories: Good, Fair, and Poor. For the purposes of this report, the following definitions are used:

- Good = Satisfactory as-is. Requires only routine maintenance during the assessment period. Repair or replacement may be required due to a system's estimated useful life.
- Fair = Satisfactory as-is. Repair or replacement is required due to current physical condition and/or estimated remaining useful life.
- Poor = Immediate repair, replacement, or significant maintenance is required.

2.2. SCOPE

The standard scope of the Facility Reserve Study includes the following:

- Visit the Property to evaluate the general condition of the building and site improvements, review available construction documents in order to familiarize ourselves with, and be able to comment on, the in-place construction systems, life safety, mechanical, electrical, and plumbing systems, and the general built environment.
- Identify those components that are exhibiting deferred maintenance issues and provide cost estimates for Immediate and Replacement Reserves based on observed conditions, maintenance history and industry standard useful life estimates. This will include the review of documented capital improvements completed within the last five-year period and work currently contracted for, if applicable.
- Provide a full description of the Property with descriptions of in-place systems and commentary on observed conditions.
- Provide a general statement of the subject Property's compliance to Title III of the Americans with Disabilities Act. This will not constitute a full ADA survey, but will help identify exposure to issues and the need for further review.
- Perform a limited assessment of accessible areas of the building(s) for the presence of mold, conditions conducive to mold growth, and/or evidence of moisture. EMG will also interview Project personnel regarding the presence of any known or suspected mold, elevated relative humidity, water intrusion, or mildew-like odors. Potentially affected areas will be photographed. Sampling will not be considered in routine assessments.

- List the current utility service providers.
- Review maintenance records and procedures with the in-place maintenance personnel.
- Observe a representative sample of the interior tenant spaces/units, including vacant spaces/units, in order to gain a clear understanding of the property’s overall condition. Other areas to be observed include the exterior of the property, the roofs, interior common areas, and mechanical, electrical and elevator equipment rooms.
- Appropriate inquiries of municipal officials regarding the existence of pending unresolved building, zoning or fire code violations on file, and a determination of the current zoning category, flood plain zone, and seismic zone for the Property.
- Provide recommendations for additional studies, if required, with related budgetary information.
- Tenant responsibility for maintenance, repair or replacement of finishes, fixtures, or equipment is not addressed by this scope of services.
- Provide an Executive Summary at the beginning of this report with a Project-At-A-Glance cost estimate as a quick, user-friendly summary of the Property’s condition and the assigned costs by category. These costs are tied to the report sections where reference to the issues are clearly defined and expanded.

2.3. PERSONNEL INTERVIEWED

The following personnel from the facility and government agencies were interviewed in the process of conducting the FRS:

| Name and Title | Organization | Phone Number |
|---|---|--------------|
| Bill Millar Public Works Manager, Parks and Open Space | City of Goleta | 805.968.6848 |
| Robin Cederlof President | Goleta Valley Historical Society | 805.681.7216 |
| James Kyriaco, Jr. Executive Director | Goleta Valley Historical Society | 805.681.7216 |
| James Harris Fire Fighter Engineer | County of Santa Barbara Fire Department | 805.681.5514 |

The FRS was performed with the assistance of the city staff members noted above who were cooperative and provided information that appeared to be accurate based upon subsequent site observations. The on-site contacts are completely knowledgeable about the subject property and answered most questions posed during the interview process.

2.4. DOCUMENTATION REVIEWED

Prior to the FRS, relevant documentation was requested that could aid in the knowledge of the subject property’s physical improvements, extent and type of use, and/or assist in identifying material discrepancies between reported information and observed conditions. The review of submitted documents does not include comment on the accuracy of such documents or their preparation, methodology, or protocol.

The following list provides more specific details about some of the documents that were reviewed or obtained during the site visit.

- Management and Lease Agreement Between the City of Goleta and the Goleta Valley Historical Society

2.5. PRE-SURVEY QUESTIONNAIRE

A Pre-Survey Questionnaire was sent to the POC prior to the site visit. The questionnaire is included in Appendix E. Information obtained from the questionnaire has been used in preparation of this report.

2.6. WEATHER CONDITIONS

The weather on April 27th was clear with temperatures in the 70s (°F) and light winds.

3. CODE INFORMATION AND ACCESSIBILITY

3.1. CODE INFORMATION, FLOOD ZONE AND SEISMIC ZONE

According to Greg Nordyke, Code Enforcement Officer of the Goleta Building Department, there are no outstanding building code violations on file. The Building Department does not have an annual inspection program. They only inspect new construction, work that requires a building permit, and citizen complaints. A copy of the original Certificates of Occupancy were requested but were not available.

According to James Harris of Station 14 of the County of Santa Barbara Fire Department, there are no outstanding fire code violations on file. The most recent inspection was conducted by the Fire Department on December 1, 2009. The Fire Department inspects the property on an annual basis.

According to the Flood Insurance Rate Map, published by the Federal Emergency Management Agency (FEMA) and dated September 30, 2005 the property is located in Zone X, defined as areas outside the 500-year flood plain with less than 0.2% annual probability of flooding. Annual Probability of Flooding of Less than one percent.

According to the 1997 Uniform Building Code Seismic Zone Map of the United States, the property is located in Seismic Zone 4, defined as an area of high probability of damaging ground motion.

3.2. ADA ACCESSIBILITY

Generally, Title III of the Americans with Disabilities Act (ADA) prohibits discrimination by entities to access and use of "areas of public accommodations" and "commercial facilities" on the basis of disability. Regardless of its age, these areas and facilities must be maintained and operated to comply with the Americans with Disabilities Act Accessibility Guidelines (ADAAG).

Buildings completed and occupied after January 26, 1992 are required to comply fully with the ADAAG. Existing facilities constructed prior to this date are held to the lesser standard of compliance to the extent allowed by structural feasibility and the financial resources available. As an alternative, a reasonable accommodation pertaining to the deficiency must be made.

During the FRS, a limited visual observation for ADA accessibility compliance was conducted. The scope of the visual observation was limited to those areas set forth in *EMG's Abbreviated Accessibility Checklist* provided in Appendix D of this report. It is understood by the Client that the limited observations described herein does not comprise a full ADA Compliance Survey, and that such a survey is beyond the scope of EMG's undertaking. Only a representative sample of areas was observed and, other than as shown on the Abbreviated Accessibility Checklist, actual measurements were not taken to verify compliance. The scope of the visual observation did not include any areas within tenant spaces.

At a city owned building the entire building is considered as a public accommodation including the site and all interior areas.

The facility does not appear to be accessible with Title III of the Americans with Disabilities Act. Elements as defined by the ADAAG that are not accessible as stated within the priorities of Title III are as follows:

Parking

- Adequate number of designated parking stalls and signage for vans are not provided.
Estimated Cost: 1 @ \$220 each = \$220
- Access aisles adjacent to parking spaces, crossing hazardous vehicle areas, from main roadways or public transportation stops to the building sidewalks and entrances are not provided. Construct a sidewalk from the public sidewalk to the service site.
Estimated Cost: 300 LF @ \$ 29/LF = \$8,709

Ramps

- The Stow House requires the construction of an entrance ramp with handrails to allow wheelchair access.
Estimated Cost: 30 LF @ \$638/LF = \$19,140

Paths of Travel

- Existing exterior and interior stairs at the Stow House are not equipped with compliant handrails (each side).
Estimated Cost: 16 LF @ \$52.10/LF \$832
- Compliant signage indicating accessible entrances at the Packing Shed and Stow House and general information are not provided.
Estimated Cost: 3 @ \$106.36 each = \$319

Property

- A full Accessibility Study is needed to determine compliance with current standards.
Estimated Cost = \$5,500

A full measured ADA Compliance Survey may reveal additional aspects of the property that are not in compliance.

Corrections of these conditions should be addressed from a liability standpoint, but are not necessarily code violations. The Americans with Disabilities Act Accessibility Guidelines concern civil rights issues as they pertain to the disabled and are not a construction code, although many local jurisdictions have adopted the Guidelines as such. The total cost to address the achievable items noted above is \$34,720. The cost of the work is included in the **Immediate Repairs Cost Estimate**.

4. EXISTING BUILDING ASSESSMENT

4.1. OCCUPANT TYPES

The following table identifies the buildings that are the property of the City of Goleta at the subject property. All other structures are the property of the Goleta Valley Historical Society. All structures at the subject property are occupied by the Goleta Valley Historical Society.

| Building | Use | Floor Area (SF) |
|-----------------------|------------------------|-----------------|
| Stow House | Museum | 7,440 |
| Caretaker's Residence | Residence | 680 |
| Garage | Visitor's Center | 1,000 |
| Bunk House | Administrative Offices | 660 |
| Packing Shed | Museum | 3,180 |
| TOTAL | | 12,960 |

4.2. AREAS NOT OBSERVED

All of the interior areas were observed in order to gain a clear understanding of the property's overall condition.

All areas of the property were available for observation during the site visit.

5. SITE IMPROVEMENTS

5.1. UTILITIES

The following table identifies the utility suppliers and the condition and adequacy of the services.

| Site Utilities | | |
|---------------------|-----------------------------------|------------------------|
| Utility | Supplier | Condition and Adequacy |
| Sanitary sewer | Goleta Sanitary District | Good |
| Storm sewer | Goleta Department of Public Works | Good |
| Domestic water | Goleta Water District | Good |
| Electric service | Southern California Edison | Good |
| Natural gas service | The Gas Company | Good |

Observations/Comments:

- The utilities appear to be adequate for the property. There are no unique, on-site utility systems such as emergency electrical generators, septic systems, water or waste water treatment plants, or propane gas tanks.

5.2. PARKING, PAVING, AND SIDEWALKS

The main entrance drive is located along North Los Carneros Road on the west side of the property. The parking areas, drive aisles, and service drives are paved with asphaltic concrete. The entrance driveway aprons are paved with concrete.

Based on a physical count, parking is provided for 48 cars. The parking ratio is 3.6 spaces per thousand square feet of floor area. There are two handicapped-accessible parking stall.

The walks throughout the property are constructed of decomposed gravel and cast-in-place concrete.

The curbs are constructed of cast-in-place concrete at the main entrance drive and extruded asphalt at the parking lot. Most pavement edges do not have curbing. At the Stow House driveway the curbs are constructed of stone blocks and the gutters are brick. Surface runoff is directed to landscaped areas, which border the paved areas.

Observations/Comments:

- The asphalt pavement is in fair to poor condition. There are isolated areas of failure and deterioration, such as alligator cracking and localized depressions at various locations and especially at the service drive leading from the parking lot to the buildings and from the paved area in front of the buildings and leading to the park. The damaged areas of paving must be cut and patched in order to maintain the integrity of the overall pavement system. The cost of this work is included in the Replacement Reserves Cost Estimate.
- In addition to the pavement repairs noted above the surface seal coating is badly worn in isolated areas. Crack sealing, pothole patching, seal coating, and re-stripping of the asphalt paving will be required over the assessment period. The cost of this work is included in the Replacement Reserves Cost Estimate.
- The concrete curbs, gutters, and sidewalks throughout the property are in good condition. Routine cleaning and maintenance will be required during the assessment period.
- There is an existing dirt service road that leads from the existing paving to Covington Way. Property management personnel indicated that the park would be better served by a paved service road. Funds for a single lane asphalt road are included in the Replacement Reserves for the construction of this road. The road construction will also include a gate at the Covington Way end of the road.

5.3. DRAINAGE SYSTEMS AND EROSION CONTROL

Storm water from the roofs, landscaped areas, and paved areas flows across the surface into natural drainage patterns at the site or to the adjacent public street.

At the southeast corner of the Bunk House, Storm water from the roofs, landscaped areas, and paved areas flows into catch basins with underground piping connected to a French drain system.

Observations/Comments:

- There is no evidence of storm water runoff from adjacent properties.
- According to the staff the catch basin and French drain system at the Bunk House is not adequate to prevent flooding of the Bunk House during heavy rain. An engineer must be retained to analyze the existing condition, provide recommendations and, if necessary, estimate the scope and cost of any required repairs. The cost to retain an engineer is included in the Immediate Repairs Cost Estimate. A cost allowance to remedy the condition is included in the **Immediate Repairs Cost Estimate**.

5.4. TOPOGRAPHY AND LANDSCAPING

The property slopes gently down from the north side of the property to the south.

The landscaping consists of trees, shrubs, and grasses. Flower beds are located throughout the site concentrated around the buildings.

Landscaped areas are irrigated by hand with the exception of the large lawn located to the west of the Stow house. The lawn is equipped with an in-ground sprinkler system, which consists of underground



pipng, shut-off valves, pop-up sprinkler heads, and automatic timers.

Surrounding properties include a fire station, a church, single-family homes, park land and agricultural uses.

Observations/Comments:

- The topography and adjacent uses do not appear to present conditions detrimental to the property.
- The landscape materials are in good condition and will require routine maintenance during the assessment period.
- The underground irrigation system appears to be in good working order. Replacement of sprinkler heads and minor repairs will be required during the assessment period. This work is considered to be routine maintenance.

5.5. GENERAL SITE IMPROVEMENTS

Property identification is provided by a monument sign adjacent to the main entrance drive and at the parking lot.

Exterior building illumination is provided by light fixtures surface-mounted on the exterior walls.

A perimeter fence is located around the Caretaker’s residence and is constructed of unfinished and painted wood. A perimeter fence is also located around the Packing Shed yard and is constructed of chain link with metal posts. Split-rail wood fencing is located along the entrance and service drive.



Dumpsters are located in the service drive and are placed on the asphalt paving. The dumpsters are not enclosed.

Observations/Comments:

- The property and tenant identification signs are in good condition. Routine maintenance will be required during the assessment period.
- The exterior site and building light fixtures are in good condition. Routine maintenance will be required during the assessment period.
- The site fencing is in good condition and will require routine maintenance during the assessment period. Scraping and painting is considered to be routine maintenance.
- The dumpsters are owned and maintained by the refuse contractor.

6. BUILDING ARCHITECTURAL AND STRUCTURAL SYSTEMS

6.1. FOUNDATIONS

Based on our observations and typical structures of similar size, configuration, and geographic location, it is assumed that the following foundation types exist at the property.

| Foundation Types | |
|-----------------------------------|---|
| Building | Foundation Type |
| Stow House, Caretaker's Residence | Cast-in-place concrete perimeter and interior footings Pre-cast concrete piers |
| Packing Shed | Cast-in-place concrete perimeter and interior footings. |
| Garage, Bunk House | Slab on grade with integral perimeter footings. |

Observations/Comments:

- **Stow House:** It appears that framing to foundation connections are inadequate and there is wood to earth contact at the interior cripple walls. Some of the foundation posts have shifted and are not completely bearing on their footings. An architect or engineer must be retained to analyze the existing condition, provide recommendations and, if necessary, estimate the scope and cost of any required repairs. The cost to retain an architect or engineer is included in the Immediate Repairs Cost Estimate. A cost allowance to remedy the condition is included in the **Immediate Repairs Cost Estimate**.
- **Other Buildings:** There is no evidence of movement that would indicate excessive settlement.
- According to the staff, the foundations of the Bunk House, Garage and Packing Shed were completely replaced in 2007 and 2008.

6.2. SUPERSTRUCTURE

Each building is a wood-framed structure and has wood framed exterior and interior bearing walls, which support the upper floor and roof diaphragms. The upper floors of Stow House and Bunk House are constructed with wood joists and are sheathed with wood. The roof diaphragms are constructed of wood rafters and sheathed with plywood.



Observations/Comments:

- According to the staff, the Bunk House, Garage and Packing Shed were seismically retrofitted in 2007 and 2008.

- The superstructure is exposed in some locations, which allows for limited observation. Walls and floors appear to be plumb, level, and stable. There are no significant signs of deflection or movement.

6.3. ROOFING

Stow House

The primary roofs are classified as steep-sloped gabled and hipped. The roofs are finished with wood shakes over asphalt-saturated paper. The roofs have sheet metal flashing elements. The roofs are not insulated.

The roofs drain over the eaves to sheet metal gutters and downspouts, which discharge to paved and landscaped areas.

The secondary roofs are classified as flat. The roofs are finished with a mineral-surfaced cap sheet over a multi-ply bituminous built-up membrane. The roofs are not insulated.

The roofs have sheet metal flashing elements and edge flashing.

The roofs drain over the edge to paved and landscaped areas.

The attic is ventilated by a louvered cupola. Attic access is provided by a scuttle hole located in the upper floor ceiling.



Caretaker's Residence, Garage and Packing Shed

The roofs are classified as steep-sloped gabled. The roofs are finished with wood shingles over asphalt-saturated paper. The roofs have sheet metal flashing elements. The roofs are insulated with fiberglass batts and loose-fill fibers.

The roof at Caretaker's Residence drains over the eaves to sheet metal gutters and downspouts, which discharge to paved and landscaped areas. The roofs at the Garage and Packing Shed drain over the eaves to paved and landscaped areas.

The Caretaker's Residence and Packing Shed attics are ventilated by gable-end wall vents. The Garage attic is ventilated by sheet metal dormer vents. Attic access is provided by a scuttle hole located in the ceiling.

Bunk House

The roof is classified as a gabled roof. The roof is finished with corrugated metal over asphalt-saturated paper. The roof has sheet metal flashing elements. The roof is insulated with fiberglass batts.

The roofs drain over the eaves to paved and landscaped areas.

The attic is ventilated by gable-end wall vents. Attic access is provided by a scuttle hole located in the upper floor ceiling.

Observations/Comments:

- The property does not have a dedicated roof repair and maintenance contractor. On-site personnel maintain the roofs or a contractor is retained when required.

Stow House

- According to the staff, the roof finishes are approximately 15-20 years old and they appear to be at least that old. Information regarding roof warranties or bonds were requested but are not available
- The field of the primary pitched roofs and secondary flat roofs are in fair to poor condition. There are damaged and missing shingles. There are significant areas of membrane degradation. Based on the estimated Remaining Useful Life (RUL) and current condition, the roof shingles and membranes will require replacement. The cost of this work is included in the **Replacement Reserves Cost Estimate**.
- There is evidence of active roof leaks. Staff reported that these leaks are active during certain weather events only. There are water-damaged interior finishes at various locations throughout the structure. All active leaks must be repaired. The cost of this work is included in the **Immediate Repairs Cost Estimate**.
- The roof flashings are in fair condition. There are isolated areas of damaged flashing elements. The damaged flashing elements must be repaired or replaced. This work can be performed in conjunction with the roof finish replacement repairs noted above.
- The roof vents appear to be inadequate. According to the staff there is evidence of excessive moisture in the attic. The staff reported that the problem began when solid sheathing was installed on the roof at the last reroofing project. It is likely that the solid sheathing reduced ventilation in the attic as the original wood shingles would have been installed over spaced sheathing, allowing for some additional ventilation of the attic. An architect or engineer must be retained to analyze the existing condition, provide recommendations and, if necessary, estimate the scope and cost of any required repairs. The cost to retain an architect or engineer is included in the **Immediate Repairs Cost Estimate** detailed in Section 6.1. A cost allowance to remedy the condition is included in the **Immediate Repairs Cost Estimate**.
- Roof drainage appears to be adequate. Clearing and minor repair of drain system components should be performed regularly as part of the property management's routine maintenance program.
- According to the staff the attics are not insulated. New insulation should be installed. The cost of this work is included in the **Immediate Repairs Cost Estimate** and should be timed to occur after roofing and ventilation issues have been addressed.
- There is no evidence of fire retardant treated plywood (FRT).
- Roof drainage appears to be adequate. Clearing and minor repair of drain system components should be performed regularly as part of the property management's routine maintenance program.

Caretaker's Residence, Garage, Bunk House and Packing Shed

- The roof finishes are approximately three years old. Information regarding roof warranties or bonds were requested but are not available.
- The roof shingles are in good condition and will require routine maintenance during the assessment period.
- The roof flashings are in good condition and will require routine maintenance during the assessment period.
- Roof drainage appears to be adequate. Clearing and minor repair of drain system components should be performed regularly as part of the property management's routine maintenance program.
- The roof vents are in good condition and will require routine maintenance during the assessment period.
- The attics are not accessible and it could not be determined if there is moisture, water intrusion, or excessive daylight in the attics. The insulation in the attics appears to be adequate.
- There is no evidence of fire retardant treated plywood (FRT).

- Roof drainage appears to be adequate. Clearing and minor repair of drain system components should be performed regularly as part of the property management's routine maintenance program.

6.4. EXTERIOR WALLS

The exterior walls are finished with painted wood siding and wood trim. The soffits are concealed and are finished with stucco wood at the Stow House. The other buildings have exposed soffits.



Observations/Comments:

Stow House

- The wood siding and trim is in fair to poor condition. There are significant areas of wood pecker-damaged and weathered wood trim, deteriorated and weathered painted finishes and siding throughout the exterior of the building. The damaged materials must be patched, repaired or replaced. The cost of this work is included in the Replacement Reserves Cost Estimate. In addition to these repairs, the exterior walls will require painting over the assessment period. The cost of this work is included in the **Replacement Reserves Cost Estimate**.
- There is significant evidence of exterior wood trim deterioration due to wood pecker activity at the Stow House. A local, licensed pest control contractor must be retained to treat the property as required to eliminate the threat. The cost of this work is included in the Replacement Reserve Cost Estimate. A regular program to prevent return of the threat must be instituted. A cost allowance to conduct this program on an annual basis is included in the **Replacement Reserves Cost Estimate**.

Caretaker's Residence, Garage, Bunk House and Packing Shed

- The exterior finishes are in good condition. Painting and patching will be required during the assessment period. The Historical Society is responsible for maintenance and replacement of the exterior walls. The cost of this work is not included in the cost tables.

6.5. EXTERIOR AND INTERIOR STAIRS

Stow House

The front exterior stairs are constructed of reinforced concrete with brick finish. The rear porch stairs are constructed of wood and have closed risers and wood treads. The handrails and balusters are constructed of wood.

The interior stairs are constructed of wood and have wood risers and treads. The handrails and balusters are constructed of wood.

Caretaker's Residence

The exterior stairs are constructed of wood and have closed risers and wood treads. The handrails and balusters are constructed of wood.

Bunk House

The exterior stairs are constructed of wood and have open risers and wood treads. The handrails and balusters are constructed of wood.

The interior stairs are constructed of wood and have carpeted risers and treads. The handrails and balusters are constructed of wood.

Packing Shed

The exterior stairs are constructed of wood and have closed risers and wood treads. The handrails and balusters are constructed of metal and cable.

Observations/Comments:

- The exterior and interior stairs, balusters, and handrails are in good condition. Painting and patching will be required during the assessment period. This work can be completed as part of the exterior painting described in Section 6.4. The Historical Society is responsible for maintenance and replacement of exterior and interior stairs. The cost of this work is not included in the cost tables.

6.6. EXTERIOR WINDOWS AND DOORS

Stow House

The windows are wood-framed and single-glazed. They are predominantly double-hung units.

The exterior doors are painted wood panel type and French doors. The exterior doors have knob handle hardware.



Caretaker’s Residence

The windows are wood-framed and aluminum framed single-glazed sliding and fixed units.

The exterior doors are painted wood partially glazed panel type doors set in wood frames. The doors have cylindrical locksets with knob handle hardware and keyed deadbolts.

Garage

The windows are wood-framed single-glazed sliding and double-hung units.

The exterior doors are painted solid-core wood, wood sliding or swing type barn doors set in wood frames. The barn doors have slide bolt and hasp hardware.

The service door is solid-core painted wood has cylindrical locksets with knob handle hardware and keyed deadbolt.

An aluminum-framed storefront system, which incorporates the entry door, is situated behind the historic barn doors. The windows are glazed with insulated panes set in metal frames. The doors are fully-glazed aluminum-framed doors set in the metal framing system.

Bunk House

The windows are wood-framed single-glazed sliding and double-hung units.

The exterior doors are painted wood panel type doors set in wood frames. The doors have cylindrical locksets with knob handle hardware and keyed deadbolts.

Packing Shed

The windows are wood-framed single-glazed sliding and double-hung units.

The exterior doors are painted solid-core wood, wood sliding or swing type barn doors set in wood frames. The slab doors have cylindrical locksets with knob handle hardware and keyed deadbolts. The barn doors have slide bolt and hasp hardware.

Observations/Comments:

Stow House

- The windows are in fair condition. The staff reported that many of the windows are not operable. There is isolated evidence of water intrusion and water damaged finishes along many of the window sills, jambs, and heads. There is evidence of water intrusion at the ceiling beam at the living room bay window which appears to be a result of intrusion thru the windows above. The services of a consultant must be retained to determine the cause of the water intrusion and to recommend any repairs, if required. The cost to retain a consultant is included in the **Immediate Repairs Cost Estimate** detailed in Section 6.1. A cost allowance to repair the windows and to replace the damaged interior finishes is also included in the **Immediate Repairs Cost Estimate**. Based on their present condition the windows will require patching, repairing and painting during the assessment period. The cost of this work is included in the **Replacement Reserve Cost Estimate**.
- The exterior doors and door hardware are in good condition and will require routine maintenance during the assessment period.
- The doors will require painting during the assessment period. This work can be completed as part of the exterior painting described in Section 6.4.

Caretaker's Residence, Garage, Bunk House and Packing Shed

- There is no evidence of window leaks or window condensation. The windows are in good condition and will require routine maintenance during the assessment period.
- The exterior doors and door hardware are in good condition and will require routine maintenance during the assessment period.
- The exterior windows and doors will require painting during the assessment period. This work can be completed as part of the exterior painting described in Section 6.4. The Historical Society is responsible for maintenance and replacement of the exterior windows and doors. The cost of this work is not included in the cost tables.

6.7. PATIO, TERRACE, AND BALCONY

A balcony is located at the second floor of the Stow House. The balcony deck is sheathed with wood. The balcony deck is finished with a liquid-applied elastomeric membrane. The balcony has painted wood guardrails.

A brick patio is located at the rear of the Caretaker's Residence and serves as an outdoor living area.

An exterior exit balcony provides access to the upper floor of the Bunk House. The balcony deck is sheathed with painted wood boards. The balcony has a painted wood guardrail.

Porches are located at the front and back of the Stow House. The porch decks are sheathed with painted wood boards. The porches have wood guardrails.

Observations/Comments:

- The patio at the Caretaker's Residence is in good condition. There are no significant signs of movement, settlement, or cracking.
- The elastomeric deck finish at the Stow House Balcony is in good condition. The decks will require resurfacing during the assessment period. The cost of this work is included in the **Replacement Reserves Cost Estimate**.
- The porch deck paint at the Stow House is worn exposing the underlying wood to damage from moisture and use. The decks must be repainted. This work can be completed as part of the exterior painting described in Section 6.4.
- The porch and balcony guardrails at the Stow House are in fair to good condition and will require repairs, patching and painting during the assessment period. This work can be completed as part of the exterior painting described in Section 6.4.
- The balcony deck and guardrail at the Bunk House are in good condition and will require routine maintenance during the assessment period.
- The balcony deck and guardrail at the Bunk House will require painting during the assessment period. This work can be completed as part of the exterior painting described in Section 6.4.

7. BUILDING MECHANICAL AND PLUMBING SYSTEMS

7.1. BUILDING HEATING, VENTILATING, AND AIR-CONDITIONING (HVAC)

Stow House

Heating and cooling are provided by gas-fired forced-air furnaces with split-system direct expansion (DX) air conditioners. The furnace and cooling coil unit are located in the crawl space. The condensing unit is pad-mounted on grade. The cooling equipment uses R-22 as a refrigerant. A humidifier is in line with the furnace and cooling unit.

Air distribution is zoned and provided to supply air registers by ducts concealed in the walls. Return air grilles are located in the floor. The heating and cooling system are controlled by local thermostats.

Natural ventilation is provided by operable windows.



Caretaker's Residence

The Bunk House is heated by a gas-fired gravity wall heater located in the living room. The unit is individually controlled by a local thermostat.

Natural ventilation is provided by operable windows.

Garage

Heating and cooling are provided by a gas-fired forced-air furnace with split-system DX air conditioner. The furnace and cooling coil unit are located in the attic. The condensing unit is pad-mounted on grade. The cooling equipment uses R-22 as a refrigerant.

Air distribution is provided to supply air registers by exposed ducts and by ducts concealed in the ceilings. Return air grilles are located in each room. The heating and cooling system is controlled by a local thermostat.

Bunk House

The Bunk House is heated by electric wall-mounted space heaters located in each space. The units are individually controlled by integral thermostats.

Packing Shed

Heating and cooling are provided in the common areas by one individual direct expansion constant volume electric package rooftop unit located in the attic. The type of refrigerant could not be determined.

Air distribution is provided to supply air registers by exposed ducts and by ducts concealed above the ceilings. Return air grilles are located in each space. The heating and cooling system are controlled by local thermostats.

Observations/Comments:

- The property does not have a dedicated HVAC repair and maintenance contractor.
- The HVAC equipment appears to be in good condition. Based on its estimated Remaining Useful Life (RUL), the equipment will require replacement during the assessment period. The Historical Society is responsible for maintenance and replacement of the HVAC equipment. The cost of this work is not included in the cost tables.

7.2. BUILDING PLUMBING AND DOMESTIC HOT WATER

The plumbing systems include the incoming water service, the cold water piping system, and the sanitary sewer and vent system. The risers and the horizontal distribution piping are copper. Galvanized piping is present at the Stow House but is reportedly abandoned. The soil and vent systems are ABS and cast iron.

The water meters are located in vaults adjacent to the public streets.

Domestic hot water is supplied to the Stow House and the Caretaker's Residence by 30-gallon gas-fired water heaters. One is located in the kitchen utility closet of the Stow House and the other is located in an exterior enclosure attached to the Caretaker's Residence.

Observations/Comments:

- The plumbing systems appear to be well maintained and in good condition. The water pressure appears to be adequate. The plumbing systems will require routine maintenance during the assessment period.
- There is no evidence that the property uses polybutylene piping for the domestic water distribution system.
- The pressure and quantity of hot water appear to be adequate.
- The water heaters appear to be in good condition. Based on their estimated Remaining Useful Life (RUL), the water heaters will require replacement during the assessment period. The Historical Society is responsible for maintenance and replacement of the water heaters. It should be noted that the Stow House water heater does not have a seismic restraint as required by CA State codes. The cost of this work is not included in the cost tables.

7.3. BUILDING GAS DISTRIBUTION

Gas service is supplied from the gas main on the adjacent public street. The gas meters and regulators are located along the exterior walls of the buildings. The gas distribution piping within each building is malleable steel (black iron).

Observations/Comments:

- The pressure and quantity of gas appear to be adequate.

- The gas meters and regulators appear to be in good condition and will require routine maintenance during the assessment period.
- Only limited observation of the gas distribution piping can be made due to hidden conditions. The gas piping appears to be in good condition.

7.4. BUILDING ELECTRICAL

The electrical supply lines run overhead from a pole-mounted transformer to an exterior-mounted electrical meter located on the northeast corner of the Packing Shed. From there power is distributed underground to the other structures.

The main electrical service size is 400 amps, 120/240 volt single-phase three-wire alternating current (AC). The electrical wiring is copper, installed in non-metallic sheathed cable. The circuit breaker panels are located at each building.

Observations/Comments:

- The on-site electrical systems up to the meter are owned and maintained by the respective utility company.
- The electrical service and capacity appear to be adequate for the property's demands.
- The switchgear, circuit breaker panels, and electrical meters appear to be in good condition and will require routine maintenance during the assessment period.

7.5. BUILDING ELEVATORS AND CONVEYING SYSTEMS

Not applicable. There are no elevators or conveying systems.

7.6. FIRE PROTECTION AND SECURITY SYSTEMS

The fire protection system consists of fire extinguishers and smoke and heat detectors. Fire extinguishers are located in each building. The nearest fire hydrants are located along the public streets bordering the property and are approximately 750 feet from the furthest building.

The Stow House is equipped with heat detectors. The Garage and Packing Shed are equipped with, illuminated exit signs, pull stations, alarm horns, and strobe light alarms. The Packing Shed is equipped battery back-up exit lights. The Caretaker's residence is equipped with smoke detectors.

A central fire alarm panel monitors the pull stations, smoke and heat detectors at the Stow House, the Garage, The Bunk House, and the Packing Shed. The alarm panel also sounds the alarm and automatically notifies the monitoring service or the fire department in the event of trouble.

Observations/Comments:

- The fire extinguishers are serviced annually and appear to be in good condition. The fire extinguishers were serviced and inspected within the last year.

- The pull stations and alarm horns appear to be in good condition and will require routine maintenance during the assessment period.
- Smoke detector and heat detector replacement is considered to be routine maintenance.
- Exit sign and emergency light replacement is considered to be routine maintenance.
- The central alarm panel appears to be in good condition and is serviced regularly by a qualified fire equipment contractor. Equipment testing is not within the scope of a Property Condition Assessment.

8. INTERIORS

8.1. INTERIOR FINISHES

The following table generally describes the interior finishes in tenant units:

| Typical Tenant Unit Finishes | | | |
|------------------------------|-----------------------------------|--|---|
| Room | Floor | Walls | Ceiling |
| Stow House | Wood, Linoleum, Vinyl, Soap stone | Painted plaster, Painted wood, Wall covering | Painted plaster, Painted wood, Suspended T-bar system with vinyl coated tiles |
| Caretaker's Residence | Carpet, Wood | Painted plaster, painted wood | Painted plaster, painted wood |
| Bunk House | Carpet | Painted wood, Painted drywall | Painted drywall |
| Garage | Concrete | Painted drywall | Painted drywall, |
| Packing House | Wood, Concrete | Painted wood, Unfinished wood | Painted wood, unfinished wood |

The interior doors are painted wood doors set in wood frames. The interior doors have cylindrical locksets with knob handle hardware.

Observations/Comments:

- Stow House: Isolated areas of the ceilings in various locations have water damage. The cost to replace the damaged finishes is relatively insignificant and the work can be performed as part of the property management's routine maintenance program. The cost of this work is not included in the cost tables.
- Other Buildings: The interior finishes in the buildings are in good condition. Based on their estimated Remaining Useful Life (RUL), the interior finishes will require replacement during the assessment period. The Historical Society is responsible for maintenance and replacement of the interior finishes. The cost of this work is not included in the cost tables.
- The interior doors and door hardware are in good condition and will require routine maintenance during the assessment period. The Historical Society is responsible for maintenance and replacement of the interior doors and hardware. The cost of this work is not included in the cost tables.



9. ACCESSORY STRUCTURES

Not applicable. The accessory structures including the restroom building, the various sheds and open barn structures present on the site are owned and maintained by the Historical Society.



10. APPENDICES

APPENDIX A: Photographic Record

APPENDIX B: Site Plan

APPENDIX C: Supporting Documentation

APPENDIX D: EMG Abbreviated Accessibility Checklist

APPENDIX E: Pre Survey Questionnaire

APPENDIX F: Terminology

APPENDIX G: Resumes for Report Reviewer and Field Observer

**APPENDIX A:
PHOTOGRAPHIC RECORD**



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



| | |
|-----------|------------------------------|
| Photo #1: | Front elevation – Stow House |
|-----------|------------------------------|



| | |
|-----------|-----------------------------------|
| Photo #2: | Right side elevation – Stow House |
|-----------|-----------------------------------|



| | |
|-----------|---|
| Photo #3: | Rear elevation of the front portion of the house – Stow House |
|-----------|---|



| | |
|-----------|--|
| Photo #4: | Right side elevation of the rear portion of the house – Stow House |
|-----------|--|



| | |
|-----------|-----------------------------|
| Photo #5: | Rear elevation – Stow House |
|-----------|-----------------------------|



| | |
|-----------|----------------------------------|
| Photo #6: | Left side elevation – Stow House |
|-----------|----------------------------------|



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #7: Rear porch – Stow House



Photo #8: Pitched roof – Stow House



Photo #9: Flat roof – Stow House



Photo #10: Eaves and soffit – Stow House



Photo #11: Balcony at second floor – Stow House



Photo #12: Rear porch steps – Stow House



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #13: Front porch – Stow House



Photo #14: Living room doors at front porch – Stow House



Photo #15: Balcony guardrail – Stow House



Photo #16: Damaged roof shingle – Stow House



Photo #17: Window sill – Stow House



Photo #18: Woodpecker damage to wood trim – Stow House



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #19: Porch wood condition – Stow House



Photo #20: Porch deck condition – Stow House



Photo #21: Living Room – Stow House



Photo #22: Interior stair – Stow House



Photo #23: Kitchen – Stow House



Photo #24: Ceiling at service kitchen – Stow House



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #25: Water damage at living bay window beam – Stow House



Photo #26: Water damage at second floor bedroom ceiling – Stow House



Photo #27: Furnace in crawl space – Stow House



Photo #28: Water heater – Stow House; note absence of seismic restraint



Photo #29: Crawl space wall earth to wood contact at sill plate – Stow House



Photo #30: Crawl space posts displaced at footing – Stow House



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #31: Front elevation – Caretaker’s residence



Photo #32: Left side elevation – Caretaker’s residence



Photo #33: Rear elevation – Caretaker’s residence



Photo #34: Right side elevation – Caretaker’s residence



Photo #35: Brick patio – Caretaker’s residence



Photo #36: Living room – Caretaker’s residence



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #37: Bathroom – Caretaker’s residence



Photo #38: Kitchen – Caretaker’s residence



Photo #39: Wall heater – Caretaker’s residence



Photo #40: Water heater – Caretaker’s residence



Photo #41: Windows – Caretaker’s residence



Photo #42: Rear door and stoop – Caretaker’s residence



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #43: Front elevation – Garage



Photo #44: Right side elevation – Garage



Photo #45: Rear elevation – Garage



Photo #46: Left side elevation – Garage



Photo #47: Window – Garage



Photo #48: Condensing Unit – Garage



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #49: Interior museum - Garage



Photo #50: Interior museum - Garage



Photo #51: Front elevation - Bunk House



Photo #52: Right side elevation - Bunk House



Photo #53: Rear elevation - Bunk House



Photo #54: Left side elevation - Bunk House



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #55: Exit balcony – Bunk House



Photo #56: Balcony guardrail and roof overhang – Bunk House



Photo #57: Electrical panel – Bunk House



Photo #58: Wall heater – Bunk House



Photo #59: Interior stair wall – Bunk House



Photo #60: Office – Bunk House



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #61: Front elevation – Packing shed



Photo #62: Left side elevation – Packing shed



Photo #63: Right side elevation – Packing shed



Photo #64: Rear elevation – Packing shed



Photo #65: Front porch – Packing shed



Photo #66: Window – Packing shed



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #67: Front porch ceiling – Packing shed



Photo #68: Main exhibit space – Packing shed



Photo #69: Interior loading door – Packing shed



Photo #70: Unfinished garage space – Packing shed

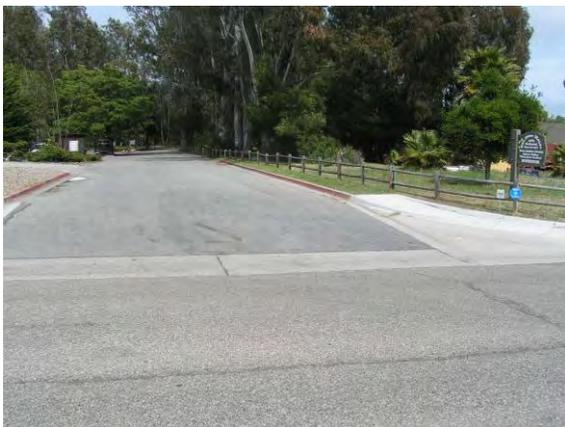


Photo #71: Main entrance drive from Los Carneros Road



Photo #72: Signage at Los Carneros Road



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



Photo #73: Signage at parking lot



Photo #74: Signage at service drive



Photo #75: Parking lot



Photo #76: Service drive pavement condition



Photo #77: Fence at caretaker's residence



Photo #78: Area of flooding in front of Bunk House



EMG PHOTOGRAPHIC RECORD

Project No.: 92184.10R-003.052

Project Name: Rancho La Patera and Stow House



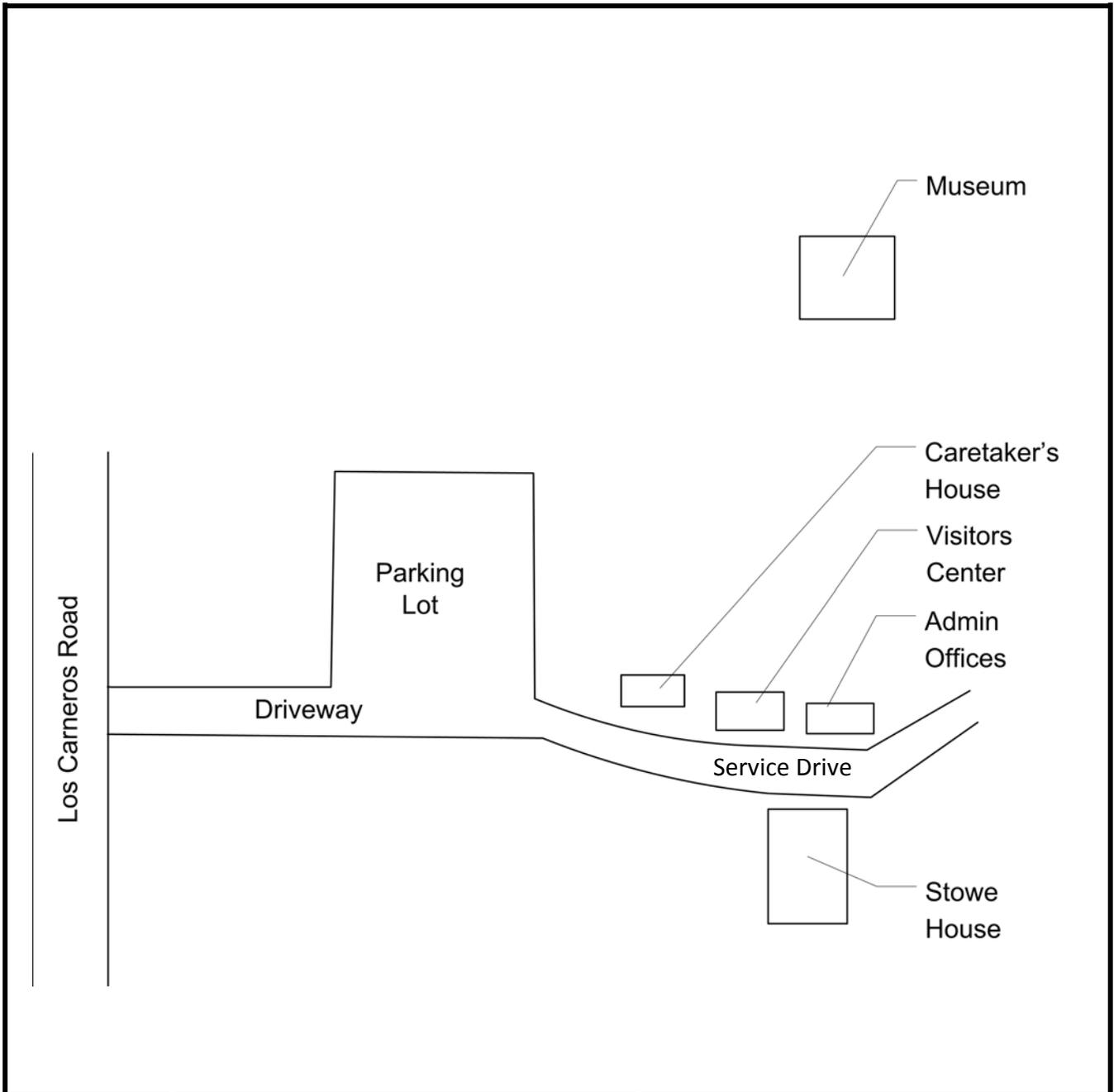
| | |
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| Photo #79: | Stow House driveway |
|------------|---------------------|



| | |
|------------|-----------|
| Photo #80: | Dumpsters |
|------------|-----------|

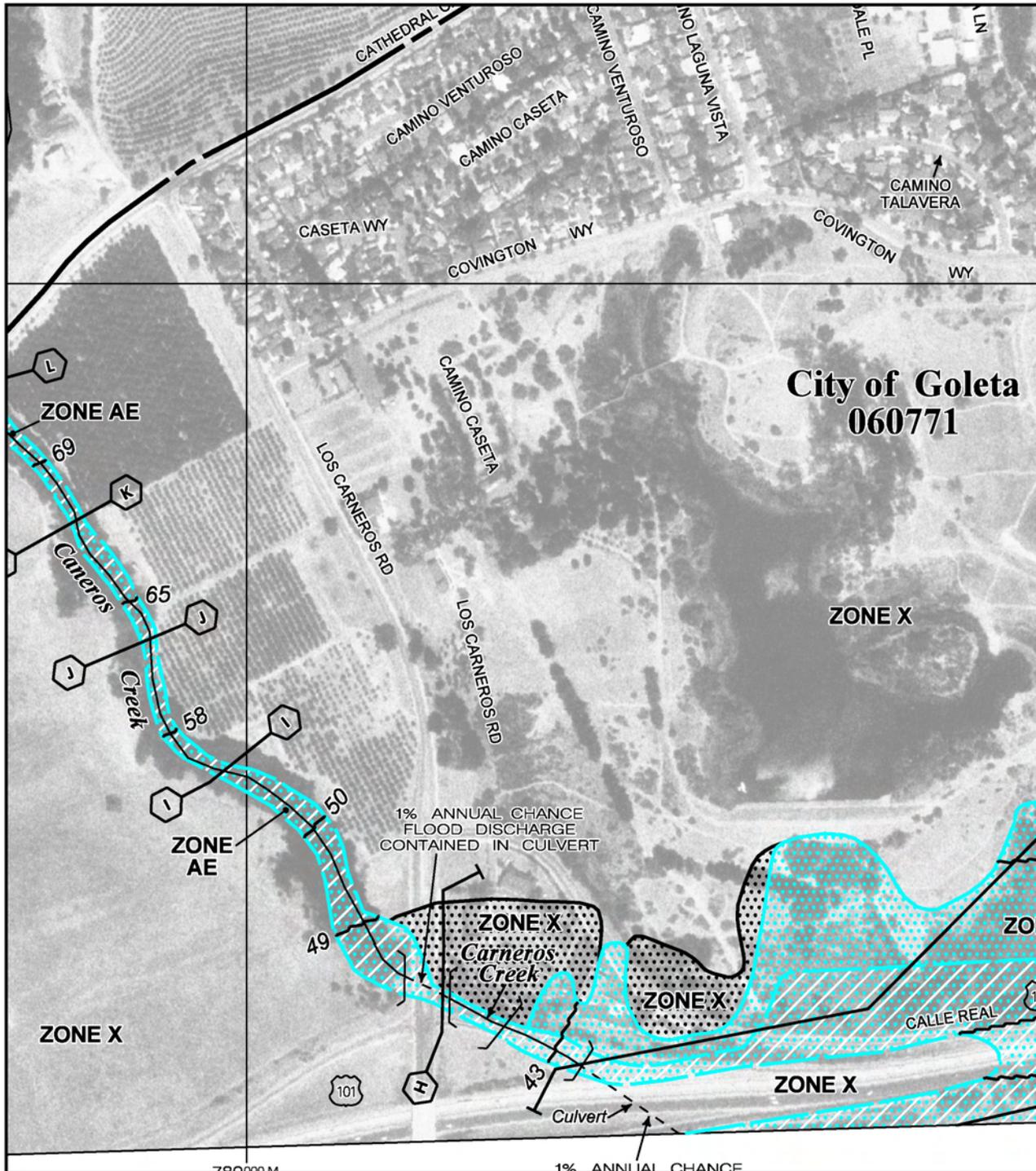
**APPENDIX B:
SITE PLAN**

Field Sketch

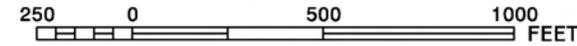


| | | |
|---|---|---|
|  | | <p><u>Project Number:</u> 92184.10R-003.052</p> |
|  | | <p><u>Project Name:</u> Rancho La Patera and Stowe House</p> |
| | <p>Not drawn to scale. The north arrow indicator is an approximation of 0° North.</p> | <p><u>On-Site Date:</u> April 27, 2010</p> |

**APPENDIX C:
SUPPORTING DOCUMENTATION**



MAP SCALE 1" = 500'



NFIP

PANEL 1353F

FIRM
FLOOD INSURANCE RATE MAP
 SANTA BARBARA COUNTY,
 CALIFORNIA
 AND INCORPORATED AREAS

PANEL 1353 OF 1835

(SEE MAP INDEX FOR FIRM PANEL LAYOUT)

CONTAINS:

| COMMUNITY | NUMBER | PANEL | SUFFIX |
|----------------------|--------|-------|--------|
| GOLETA, CITY OF | 060771 | 1353 | F |
| SANTA BARBARA COUNTY | 060331 | 1353 | F |

Notice to User: The **Map Number** shown below should be used when placing map orders; the **Community Number** shown above should be used on insurance applications for the subject community.



MAP NUMBER
 06083C1353F

EFFECTIVE DATE
 SEPTEMBER 30, 2005

Federal Emergency Management Agency

NATIONAL FLOOD INSURANCE PROGRAM

This is an official copy of a portion of the above referenced flood map. It was extracted using F-MIT On-Line. This map does not reflect changes or amendments which may have been made subsequent to the date on the title block. For the latest product information about National Flood Insurance Program flood maps check the FEMA Flood Map Store at www.msc.fema.gov

MANAGEMENT AND LEASE AGREEMENT

BETWEEN THE CITY OF GOLETA

AND THE GOLETA VALLEY HISTORICAL SOCIETY

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**MANAGEMENT AND LEASE AGREEMENT
BETWEEN THE CITY OF GOLETA
AND THE GOLETA VALLEY HISTORICAL SOCIETY**

This Management and Lease Agreement is made and entered into this 20th day of September 2004, by and among the City of Goleta, a California municipal corporation, hereinafter referred to as "CITY," and the Goleta Valley Historical Society, a non-profit corporation, hereinafter referred to as "SOCIETY." In consideration of the mutual covenants and conditions set forth herein, the parties agree as follows:

WHEREAS, upon incorporation, CITY assumed ownership of the real property known as Los Carneros Park, a community park which includes several buildings and grounds appurtenant thereto, including the Stow House, its grounds and all associated buildings and facilities, and used by the private and public sectors, and more particularly described as a portion of Assessor's Parcel Number 77-160-57; and

WHEREAS, the County of Santa Barbara, the prior owner of Los Carneros Park, previously entered into a Lease Agreement with SOCIETY, dated February 4, 1980 and subsequently amended on August 19, 1985; and

WHEREAS, the Lease Agreement has terminated pursuant to its terms; and

WHEREAS, Government Code Section 37396 allows CITY to lease City-owned property for park, recreational and exhibition purposes; and

WHEREAS, the SOCIETY desires to continue to occupy and operate the premises to serve the educational and recreational needs of the general public; and

WHEREAS, the CITY deems the leasing of the premises and buildings to SOCIETY and the management of the premises by SOCIETY to be in the best interests of the CITY,

NOW, THEREFORE, CITY hereby leases to SOCIETY and SOCIETY hereby takes the property described herein subject to the following terms and conditions:

1. **ADMINISTRATION:** The provisions of this Management and Lease Agreement (hereinafter "Agreement") shall be administered and enforced for CITY by the City Manager or designee. SOCIETY'S occupancy shall at all times be subject to all provisions of the rules and regulations of the City of Goleta Municipal Code, and any applicable permits. SOCIETY shall perform its part of this Agreement as a lessee and nothing herein contained shall be construed to be inconsistent with this relationship or status.

2. **PREMISES:** The real property and improvements leased to SOCIETY and covered by this Agreement (hereinafter "Premises") are located in City of Goleta, State of California, and commonly known as a portion of Santa Barbara County Assessor's Parcel Number: 77-160-57 and said Premises are shown on Exhibit "A" which is attached hereto and made a part hereof by reference. The parking lot adjacent to the Premises shall remain common space and will be a joint use area to be shared by SOCIETY and occupants of and visitors to the Goleta Depot and Los Carneros Park.

3. **PURPOSE:** CITY leases the Premises to SOCIETY for the purpose of obtaining management, operation, and maintenance of said Premises for historical preservation, educational purposes and recreational use by the public in a manner consistent with public park use. SOCIETY shall properly maintain and repair the buildings and improvements appurtenant thereto to keep them clean, neat and sanitary for the use of the private and public sectors.

4. **TERM:** The term of the Agreement shall be for fifteen (15) years commencing on September 20, 2004, and shall run through September 20, 2019, unless sooner terminated as herein provided.

SOCIETY may elect to extend this Agreement for an additional period of five (5) years. Should SOCIETY elect to exercise such option, then SOCIETY shall notify CITY of such election in writing no less than ninety (90) calendar days prior to the termination date of this Agreement.

5. **HOLDOVER:** CITY and SOCIETY agree that in the event this Agreement is not renewed by the date of expiration stated herein, and in the event that CITY does not otherwise make arrangements for maintenance of the Premises, a hold over period from month to month, and not to exceed a total of twelve months, shall commence and all terms and conditions in this Agreement shall remain in full force and effect.

6. **ASSIGNMENT:** SOCIETY shall not assign this Agreement or any interest, or any part thereof, or any right, or privilege appurtenant thereto without the written consent of CITY. Any attempt to assign shall be void and without legal effect.

7. **CONSIDERATION:** The SOCIETY agrees to pay CITY, ONE DOLLAR (\$1.00) per year during the term of this lease (due and payable for the full lease term of fifteen years in advance) and to perform such services as specified herein. SOCIETY'S payment of Fifteen Dollars (\$15) shall be made to CITY and sent within thirty (30) calendar days of the execution of this agreement to the address shown in Section 25, NOTICES, or such other place as the parties shall agree upon.

8. **MAINTENANCE AND REPAIRS:** SOCIETY hereby agrees to maintain the interior of Stow House and to maintain the interior and exterior of all accessory buildings now on the Premises; provided, however, that CITY will maintain the exterior and structure of Stow House and the landscaped grounds leased hereby. CITY also shall be responsible for maintenance of fire equipment on the Premises. CITY and SOCIETY further agree to perform maintenance and repair work on the subject properties and appurtenances as said maintenance and repair responsibilities are set forth in Exhibit "B", attached hereto and incorporated herein by reference. In the event of a disagreement between the provisions of this section and Exhibit "B", the exhibit shall prevail. SOCIETY agrees that CITY has the right to revise said Exhibit "B" as part of its approval of any new structures and/or improvements to the Premises proposed by SOCIETY.

All maintenance and repair work will be done in a competent and workmanlike manner. SOCIETY shall send written notice to CITY that such maintenance and repair work is needed at least thirty (30) calendar days prior to the commencement of said work. CITY shall confer with SOCIETY prior to the commencement of any repair or replacement work on the exterior of Stow House or on the adjacent landscaped grounds.

SOCIETY shall employ all persons required for the performance of SOCIETY'S responsibilities under this Agreement and such persons shall be and remain employees of SOCIETY and shall not be the agents or employees of CITY. SOCIETY hereby promises and agrees to comply with all of the provisions of the Federal Immigration and Nationality Act, 8 U.S.C.A. §§ 1101, et seq., as amended, and in connection therewith, shall not employ unauthorized aliens as defined therein. Should SOCIETY so employ such unauthorized aliens for the performance of work and/or services covered by this Agreement, and should any liability or sanctions be imposed against CITY for such use of unauthorized aliens, SOCIETY hereby agrees to and shall reimburse CITY for the cost of all such liabilities or sanctions imposed, together with any and all costs, including attorneys' fees, incurred by CITY.

SOCIETY agrees not to employ help, purchase or rent supplies, equipment or services, or incur any expenses in the name of CITY.

9. UTILITIES AND SERVICES:

A. WATER SERVICE. CITY shall pay for and make arrangements for water service to the Premises.

B. WASTEWATER COLLECTION SERVICE. SOCIETY shall make arrangements for and pay all service and connection charges for wastewater removal services at the Premises. SOCIETY shall be directly billed by the Goleta West Sanitary District for said service on an annual basis.

C. SOLID WASTE REMOVAL AND RECYCLING. SOCIETY shall make arrangements for and pay all charges for the removal of solid waste from the Premises. This service shall include routine weekly pick-up of waste, recycling, and any additional removal of waste needed for periodic events and activities conducted on the Premises. CITY reserves the right to assume responsibility for the removal of all waste from the Premises, at such time as CITY has established a City solid waste franchise within the City of Goleta.

D. ELECTRICAL SERVICE. SOCIETY shall also make arrangements for and pay all service and connection charges for electrical service on the Premises.

E. NATURAL GAS SERVICE. SOCIETY shall make all arrangements and pay all service and connection charges for natural gas service on the Premises.

F. TELEPHONE SERVICE. SOCIETY shall be responsible for making arrangements for and paying all service and connection fees for telephone service at the Premises as well.

G. CABLE SERVICE. Cable service for the Caretaker's House shall be the responsibility of the caretaker(s) hired from time to time by the Society to maintain portions of the Premises and to provide security. Said caretaker(s) shall at all times be responsible for making arrangements for and payment of all cable service and connection charges.

If SOCIETY'S utility or service requirements increase over the existing level of utility or service use as of the date the term commences, SOCIETY shall be required to pay for any and all new utility or services used and/or installed on said Premises. Installation costs shall include not only the costs of installing utilities or services on the Premises, but also the cost of bringing such utilities or services to the Premises. If SOCIETY is constructing or remodeling improvement(s) and additional utility or service installation is required (i.e. wiring, plumbing, conduits, and mains) as a result from SOCIETY'S changes or increased

utility or service requirements, SOCIETY shall pay on demand by the public utility or service company(s) the total costs of said utility and/or service.

It is further agreed by the parties that CITY shall make provisions to maintain and repair all exterior water and sewer lines as per Exhibit B of this Agreement.

10. **USE OF PREMISES:** SOCIETY shall manage and operate the Premises and shall not permit the Premises to be used for any other purposes than as defined herein, without first obtaining the written consent of CITY. SOCIETY shall not encourage, or permit to continue within the Premises, acts which are unlawful. To do so constitutes a material breach of this Agreement. At all times, use of the Premises shall be subject to all applicable rules and regulations pertaining to developed parks of CITY, and to any applicable permits.

SOCIETY hereby agrees to use, and to permit the use of the Premises leased herein solely for community activities and for the benefit and enjoyment of the general public, and further agrees to make said Premises available to members of the public and civic groups and organizations of similar nature on a nondiscriminatory basis. SOCIETY may consider and approve any uses to be made to the Stow House grounds which are consistent with the policies set forth herein. All such uses are subject to all applicable rules and regulations pertaining to developed parks of CITY, any applicable permits, and the conditions set forth in Exhibit "C", "Agreement for Use of Stow House and Grounds", which is attached hereto and incorporated herein by reference.

SOCIETY shall limit its use of the grounds of Stow House to those uses that are compatible with the purposes set forth above, do not constitute an undue burden on or risk to the facilities or the grounds and Stow House, are sponsored by or approved by the SOCIETY as per SOCIETY'S rules and regulations, and are designed to foster and further the primary purposes of the SOCIETY, including, but not limited to:

- A. Publicizing the Stow House facilities.
- B. Raising funds for maintenance, improvement and restoration of the facilities.
- C. Conducting Society functions: including but not limited to tours, meetings of the Society's membership, and open houses.
- D. Making the Stow House facilities reasonably available to the public for appropriate and limited public and private functions.

Furthermore, SOCIETY agrees that all users will pay a fee which is sufficient to defray the costs the Society incurs in connection with such event. Such costs may include utilities, cleaning, personnel stationed to monitor the event, and such other costs as are incidental thereto. All events must be conducted in accordance with the rules adopted by CITY with respect to the use of CITY parks by private groups.

A "SCHEDULE OF ACTIVITIES" is included in this Agreement as Exhibit "D" and is made a part hereof by reference herein. SOCIETY agrees to furnish quarterly to CITY, the schedule of events and activities planned for the ensuing year, and to notify CITY of any additions or deletions to the schedule at least seven (7) calendar days prior to the date of the scheduled event.

SOCIETY and CITY hereby acknowledge and agree that no alcoholic beverages other than beer or wine may be served in Los Carneros Park, or any other of CITY'S parks. SOCIETY hereby agrees not to permit alcoholic beverages to be sold, served, consumed or brought upon the Premises unless specifically authorized by CITY. CITY may allow beer and wine (including champagne) to be served at events conducted on the Premises if users comply with SOCIETY'S rules and regulations as outlined in Exhibit "C," as well as all applicable rules then in effect with respect to developed parks of CITY. Sale of beer and/or wine by SOCIETY, or any other users of the Premises, is prohibited unless the seller obtains a Temporary Liquor License from the Alcoholic Beverage Control Board in compliance with

County Ordinance No. 2543. Any party desiring to sell beer or wine on the Premises must first obtain an Authorization Form from CITY, and then submit the Form to the Alcoholic Beverage Control Board for final approval of a Temporary Liquor License. A copy of CITY'S Authorization Form is attached hereto in Exhibit "E."

SOCIETY agrees that at any time during the term of this Agreement, if SOCIETY discontinues the use of the Premises for community recreation and historical preservation, this discontinuance shall constitute a material breach of this Agreement.

11. **FEE SCHEDULES:** SOCIETY agrees that it will not impose or levy any discriminatory or otherwise unreasonable charges or fees for the public use of the Premises.

CITY shall have the right, at any time, to review any and all fees, charges and prices established or made by SOCIETY and to notify SOCIETY if they find any fees, charges and prices are unreasonable or unlawfully discriminatory. A schedule of fees is incorporated into EXHIBIT "C". SOCIETY shall submit any proposed changes to the schedule of fees to CITY for review.

12. **REVENUES/EXPENSES:** SOCIETY agrees that any and all revenues received by SOCIETY shall be used for the benefit of the Premises and that any shortfall between the income and the expenditures shall be paid for by SOCIETY. SOCIETY agrees to submit to CITY its annual budget for review within thirty (30) calendar days of adoption. The purpose of such inspection shall be for verifying the proper use of the aforementioned revenues.

13. **TAXES AND ASSESSMENTS:** SOCIETY, by their signature herein, acknowledges that the use or occupancy of the Premises by SOCIETY may constitute a possessory interest which may be subject a to property taxation. SOCIETY shall pay and discharge all taxes and assessments, including special and/or possessory interest taxes, if any, levied upon said property, based on the use or occupancy of the Premises.

14. **CONSTRUCTION:** SOCIETY may construct or make reasonable structural changes to the existing facilities in, on, or about the Premises. Such changes shall be made solely at the expense of SOCIETY and SOCIETY shall obtain prior written authorization from the CITY for construction or alterations on the Premises.

Any construction or alterations in, on, or about the Premises shall be presented to CITY in written form with proposed plans prior to any constructions or alterations. The CITY'S consent shall be deemed conditioned upon SOCIETY acquiring appropriate permits from governmental agencies, the furnishing of a copy thereof to CITY prior to the commencement of the work, and the compliance by SOCIETY with all conditions of said permit in a prompt and expeditious manner. Any and all permits or clearances required shall be made only on the merits of the application thereof, and nothing in this Agreement shall be construed to require that CITY, or any other government agency, is required to grant such permits or clearances. SOCIETY shall give CITY not less than thirty (30) calendar days written notice prior to the commencement of any work in, or about the Premises, and CITY shall have the right to post Notices of Non-responsibility in or on the Premises as provided by law.

Any construction or alterations by SOCIETY pursuant to this section shall keep the leasehold and improvements free and clear of liens for labor and material expended by or for SOCIETY or on its behalf and shall hold CITY harmless with respect to any such improvements.

15. **ABANDONMENT:** SOCIETY shall not vacate or abandon the Premises at any time during the term of this Agreement, and if SOCIETY shall abandon, vacate, or surrender such Premises, any personal property belonging to SOCIETY and left on the Premises thirty (30) calendar days thereafter shall be deemed abandoned, at the option of CITY.

16. **CITY ACCESS:** SOCIETY agrees to permit CITY and its authorized agents, employees, and independent contractors access to the Premises at all reasonable times for the purpose of inspection or for making necessary improvements or repairs, as deemed

necessary by CITY.

17. **INDEMNIFICATION:** SOCIETY agrees to defend, indemnify and hold harmless CITY, its officers, agents, and employees from and against loss, personal injury, property damages, claims, suits, proceedings (including reasonable attorney's fees), judgments or liabilities arising from negligent or willful acts or omissions of SOCIETY, their officers, agents, employees, and contractors occasioned by or in connection with the use of the Premises by SOCIETY, whether such loss, personal injury, or property damage is sustained by SOCIETY, their officers, agents, or employees, or any other person.

CITY agrees to defend, indemnify and hold harmless SOCIETY, its officers, agents, and employees from and against loss, personal injury, property damages, claims, suits, proceedings (including reasonable attorney's fees), judgments or liabilities arising from negligent or willful acts or omissions of CITY, their officers, agents, employees, and contractors occasioned by or in connection with the use of the Premises by CITY, whether such loss, personal injury, or property damage is sustained by CITY, their officers, agents, or employees, or any other person.

18. **INSURANCE:** SOCIETY shall procure the following required insurance coverage. Certificate(s) of Insurance shall be furnished to the CITY upon the execution of this Agreement. Certification of all required policies shall be signed by a person authorized by that insurer to bind coverage on its behalf and must be filed with CITY prior to exercising any right or performing any activities pursuant to the Agreement. Said policies shall be endorsed to state that coverage shall not be cancelled by either party, without thirty (30) calendar days prior notice in writing to CITY. Furthermore, all policies, excluding Workers' Compensation, shall contain an endorsement naming CITY as an additional insured. SOCIETY shall give CITY prompt and timely notice of claim made or lawsuit arising out of SOCIETY'S operations hereunder.

Insurance coverage in the minimum limits as specified below shall be maintained during the term of this Agreement. All insurance coverage shall be placed with insurers which; 1) have a Best's rating of no less than A-VII or equivalent rating, and 2) are admitted insurance companies in the State of California. All other insurers require prior approval of the CITY. Failure to comply with the insurance requirements and to furnish Certificates of Insurance shall constitute a material breach of this Agreement. CITY may periodically review the minimum limits as established below. In the event of a change in the minimum limits, the CITY shall inform SOCIETY of such change by giving written notice to SOCIETY no less than sixty (60) calendar days prior to the expiration date of any existing insurance policy or policies. Upon request by CITY, SOCIETY shall provide certified copies of any insurance policies to CITY within ten (10) calendar days.

A. GENERAL AND AUT OMOBILE LIABILITY INSURANCE: The general liability insurance shall include personal injury liability coverage, shall afford coverage for all Premises and operations of SOCIETY, shall include contractual liability for the agreement between CITY and SOCIETY, and in the event SOCIETY sells merchandise and/or services to the public shall include products/completed operations liability coverage. The automobile liability insurance shall cover all owned, non-owned and hired motor vehicles which are operated on behalf of SOCIETY pursuant to SOCIETY'S activities hereunder. CITY, its officers, employees, and agents shall be named as "Additional Insured" on any policy. The limit of liability of said policy or policies for general and automobile liability insurance shall not be less than \$1,000,000.00 per occurrence combined single limit for bodily injury and property damage. Personal injury coverage should also be in the amount of not less than \$1,000,000.00 per occurrence and aggregate. Said policy or policies shall contain a provision that such insurance as is afforded by this policy shall be primary and contributory to the full limits stated in the declarations, and if the CITY has other valid and collectible insurance for a loss covered by this policy, that other insurance shall be excess only.

B. PROPERTY INSURANCE: SOCIETY shall maintain insurance coverage of all of the contents of the interiors of Stow House and all out buildings which it owns. Any insurance policy shall include provisions denying to the insurer acquisition by subrogation of rights of recovery against the other party to the extent the rights have been waived by the insured prior to occurrence of loss or injury.

C. WORKERS' COMPENSATION INSURANCE: Statutory Workers' Compensation and Employer's Liability Insurance shall cover all SOCIETY'S staff while performing any work incidental to the performance of this Agreement. The policy shall provide that no cancellation, major change in coverage, or expiration shall be effective or occur until at least thirty (30) calendar days after receipt of such notice by CITY.

19. CITY INSURANCE: CITY shall maintain All-Risk Property Insurance coverage and General Liability Insurance coverage for the Stow House, its grounds, and all associated buildings and facilities on the Premises.

20. AGENTS' INSURANCE: SOCIETY shall require all contractors, permittees, and licensees (hereinafter "agents") performing any activities or duties on said Premises, to carry such general liability insurance and workers' compensation insurance according to the terms and in the limits detailed below. Certification of all required policies shall be signed by a person authorized by that insurer to bind coverage on its behalf and must be filed with SOCIETY prior to the commencement of any work on the Premises. Said policies shall be endorsed to state that coverage shall not be cancelled by either party, without thirty (30) calendar days prior notice in writing to SOCIETY. Furthermore, all policies, excluding Workers' Compensation, shall contain an endorsement naming CITY as an additional insured. SOCIETY shall give CITY prompt and timely notice of claim made or suit instituted arising out of the agent's operations hereunder.

All insurance coverage shall be placed with insurers which; 1) have a Best's rating of no less than A-VII or equivalent rating, and 2) are admitted insurance companies in the State of California. All other insurers require prior approval of the CITY. Failure of agents to comply with the insurance requirements and to furnish Certificates of Insurance shall constitute a material breach of this Agreement.

A. GENERAL LIABILITY INSURANCE. The general liability insurance shall include personal injury liability coverage, and shall afford coverage for all operations of the agents on the Premises. SOCIETY, its officers, employees, and agents and CITY, its officers, employees, and agents shall be named as "Additional Insured" on any policy. The limit of liability of said policy or policies for general liability insurance shall not be less than \$1,000,000.00 per occurrence combined single limit for bodily injury and property damage. Personal injury coverage should also be in the amount of not less than \$1,000,000.00 per occurrence and aggregate. Said policy or policies shall contain a provision that such insurance as is afforded by this policy shall be primary and contributory to the full limits stated in the declarations, and if the SOCIETY or CITY have other valid and collectible insurance for a loss covered by this policy, that other insurance shall be excess only.

B. WORKERS' COMPENSATION INSURANCE: Statutory Workers' Compensation and Employer's Liability Insurance shall cover the agent's staff while performing any work on the Premises. The policy shall provide that no cancellation, major change in coverage, or expiration shall be effective or occur until at least thirty (30) calendar days after receipt of such notice by CITY.

21. **REMOVAL OF IMPROVEMENTS:** Upon termination of this Agreement (including any extension thereof) by default, expiration, or any other reason, SOCIETY shall vacate and return possession of said Premises to CITY. Prior to returning possession of said Premises, SOCIETY, shall upon request of CITY: 1) remove all SOCIETY owned structures and improvements constructed by SOCIETY on said CITY property, and restore said CITY

property to a condition satisfactory to CITY, or; 2) transfer to CITY title and interest to said SOCIETY owned structures and improvements constructed on said CITY property, to be conveyed at no cost, to the CITY.

Upon expiration or termination of this Agreement for any reason, SOCIETY shall remove from said CITY land, any personal property owned by it or any personal property owned by third parties. Any and all personal property left on the Premises for a period of more than thirty (30) calendar days after termination shall be deemed abandoned, at the option of CITY.

22. **CITY INTEREST:** CITY'S interest in SOCIETY'S operations hereunder shall be deemed that of a landlord, and SOCIETY'S operations hereunder shall not be considered as an operation of the City of Goleta, and shall be as an independent contractor and not an agent, employee, or officer of CITY.

23. **UNLAWFUL DISCRIMINATION:** SOCIETY, in the use and operation to be conducted pursuant to the provisions of this Agreement, will not discriminate or permit discrimination against any person or class of persons by reason of race, color, creed, religion, ancestry, age, sex, or national origin in any manner prohibited by the laws of the United States, the State of California, or any ordinance or policy of CITY. Noncompliance with provisions of this article shall constitute a material breach hereof and, in addition to any remedies provided by law, CITY shall have the right to terminate this Agreement and the interest hereby created without liability thereof.

24. **MATERIAL BREACH OF LEASE:** When the term material breach is used in this Agreement, it shall be construed to mean that, in addition to other remedies as provided by law, CITY has the right to terminate this Agreement, and the interest hereby created, without liability thereof.

SOCIETY shall assume no responsibility for any contamination which may be discovered on the Premises if such contamination was caused by occupants of the Premises prior to its use by SOCIETY.

29. **DEFAULT:** The occurrence of any one of the following events shall constitute a material breach under this Agreement as well as items cited in various sections above:

A. Failure of SOCIETY to perform, or violation of, any provisions of this Agreement, if such failure and/or violation is not cured within thirty (30) calendar days after mailing of written notice has been given to SOCIETY unless another time is specified herein. If the nature of SOCIETY'S default is such that more than thirty (30) calendar days are reasonably required for its cure, SOCIETY shall not be in default if SOCIETY commences such cure diligently and in good faith of completion.

B. Failure of SOCIETY to make any payment of rent or other required payment when due and such failure continues for a period of ten (10) calendar days.

C. Failure to provide Insurance as required in Sections 18 and 20 herein.

D. The making of a general assignment for the benefit of creditors by SOCIETY.

E. The appointment of a receiver or trustee to take possession of all or substantially all the assets of SOCIETY.

30. **REMEDY IN EVENT OF DEFAULT:** Upon the occurrence of any event of default, CITY shall have at its option, at the expiration of the cure period provided in Section 29 above and in addition to and not in limitation of any other remedy permitted by law, the right to terminate this Agreement by written notice to SOCIETY, in which event SOCIETY shall immediately surrender the Premises to CITY. If SOCIETY shall fail to do so, CITY may without notice enter and take possession of the Premises and remove anyone occupying

the Premises and the effects of such occupant without hereby incurring any liability for such entry and removal.

31. **WAIVER:** The waiver by CITY of a breach of any term of this Agreement shall not be construed to be a waiver of any future breach of the same or any other requirement contained in this Agreement. The acceptance of any fees or charges by CITY shall not be treated as a waiver of any breach of any term of this Agreement, other than the failure of SOCIETY to pay the particular fees or charges so accepted, regardless of CITY'S knowledge of a previous breach at the time of acceptance thereof.

32. **COMPLIANCE WITH THE LAW:** The SOCIETY shall comply with all local, city, state and federal laws, rules, and regulations relating to the use of the Premises.

33. **ACCEPTANCE OF PREMISES:** The SOCIETY has examined the Premises and has determined that the Premises are suitable for the needs and operations of the SOCIETY.

34. **PROHIBITION ON ENCUMBRANCES:** SOCIETY shall have no right to grant any security interest in this Agreement, the Premises or any improvements thereon. Any attempt to grant a security interest or otherwise encumber the Premises or its improvements, even if constructed by or at the direction of SOCIETY, shall be void and without legal effect.

35. **AMENDMENTS:** This Agreement may be modified by written agreement of CITY and SOCIETY. The parties acknowledge that circumstances may arise which may call for or require mutual good faith negotiations for the amendment of the Agreement. Without limitation due to enumeration, the parties agree to meet and confer regarding the possible mutual amendment of this Agreement within thirty (30) calendar days of the written notice by one party to the other party that an amendment is desired.

36. **TERMINATION:** This Agreement shall terminate and all rights of SOCIETY hereunder shall cease and SOCIETY shall quietly and peacefully deliver to CITY possession and interest in the Premises:

A. At the expiration of the term as provided in Section 4, TERM, hereof.

B. Upon failure of SOCIETY to satisfy, observe or perform any of the covenants, conditions or reservations set forth in this Agreement and the expiration of the cure period as provided in Section 29, DEFAULT, hereof.

C. Either party shall have the right to terminate this Agreement upon the giving of ninety (90) calendar days prior written notice.

37. **PRIOR AGREEMENTS AND LEASE:** This Agreement hereby replaces and revokes all prior agreements and/or leases between the County of Santa Barbara and SOCIETY.

IN WITNESS WHEREOF, SOCIETY and CITY have executed this Agreement by the respective authorized officers as set forth below.

CITY OF GOLETA

GOLETA VALLEY HISTORICAL SOCIETY

FREDERICK C. STOUDE
City Manager

ATTEST:

APPROVED AS TO FORM:

CYNTHIA M. RODRIGUEZ
City Clerk

JULIE HAYWARD BIGGS
City Attorney

EXHIBIT A
MAP OF PREMISES

EXHIBIT B

MAINTENANCE AND REPAIR RESPONSIBILITY

| Item No. | ITEM | SOCIETY | CITY |
|-----------------|-------------------------------|----------------|-----------------|
| 1. | Building Exteriors | | |
| | Repair Walls | X | Stow House Only |
| | Painted Surfaces | X | Stow House Only |
| | Door and Window Trim | X | Stow House Only |
| | Doors, Hardware | X | Stow House Only |
| | Windows: Hardware and Screens | X | Stow House Only |
| | Locks | X | |
| | Roof | | X |
| | Rain Gutters/Drains | | X |
| | Flashing | | X |
| | Down Spouts | | X |
| | Lighting | X | |
| | Bulbs | X | |
| | Features | X | |
| | Transformers | X | |
| | Fluorescent Lights | X | |
| | Ballast | X | |
| | Handrails | X | Stow House Only |
| | Signs | X | Stow House Only |
| | Decking | X | Stow House Only |
| | Stairs | X | Stow House Only |
| | Gates | X | |
| | Timers | X | |
| | Gas/Water Lines | | X |
| | Phones/Elect. Lines | | X |
| | Sewer Lines | | X |
| 2. | Building Interiors | | |
| | Walls | X | |
| | Painted Surfaces | X | |
| | Door Hardware | X | |
| | Locks | X | |
| | Carpet, Vacuum and Cleaning | X | |
| | Floor, Sweeping and Cleaning | X | |
| | Floor, Wax and Cleaning | X | |
| | Drapes | X | |

| Item No. | ITEM | SOCIETY | CITY |
|----------|--|---------|------|
| | Lighting | X | |
| | Bulbs | X | |
| | Fixtures | X | |
| | Transformers | X | |
| | Fluorescent Lights | X | |
| | Ballast | X | |
| | Handrails | X | |
| | Signs | X | |
| | Timers | X | |
| | Drinking Fountains | X | |
| | Ceiling | X | |
| | Showers | X | |
| | Toilet/Urinals: Replacement | X | |
| | Toilet/Urinals: Maintenance and Janitorial Service | X | |
| | Sink & Faucets: Replacement | X | |
| | Sink & Faucets: Maintenance and Janitorial Service | X | |
| | Gas Lines | X | |
| | Water Lines | X | |
| | Sewer Lines/Drains | X | |
| | Phone Lines & Jacks | X | |
| | Computer Lines & Jacks | X | |
| | TV Cable & Jacks | X | |
| | Phones | X | |
| | Towel Racks | X | |
| | Garbage Disposal | X | |
| | Refrigerator | X | |
| | Stove | X | |
| | Counter Tops | X | |
| | Cabinets | X | |
| | Blinds | X | |
| | Window Shades | X | |
| | Trash Compactor | X | |

| Item No. | ITEM | SOCIETY | CITY |
|-----------|---|---------|------|
| 3. | Grounds | | |
| | Mail Boxes | X | |
| | Drinking Fountains | | X |
| | Fences | | X |
| | Trash Bins | | X |
| | Signs | | X |
| | Litter Pick-Up | | X |
| | Lighting | | X |
| | Parking Lot | | X |
| | Driveways | | X |
| | Walkways | | X |
| | Timers (external) | | X |
| | Timers (internal) | | X |
| | Signs | | X |
| | Cleaning, Sidewalks, Walkway, Parking Lot | | X |
| 4. | Landscaping | | |
| | Trees | | X |
| | Shrubs | | X |
| | Flowers | | X |
| | Lawn Mowing | | X |
| | Watering | | X |
| | Weed Abatement | | X |
| | Sprinkler, Repair and Replace | | X |
| | Rodent/Pest | | X |
| | Seeding | | X |
| | Fertilizer | | X |
| | Plant Trimming | | X |
| | Plant Removal | | X |
| | Plant Replacement | | X |
| | Fire Protection: Clearing of dry brush, undergrowth, dead or fallen trees | | X |
| | Major Tree Trimming | | X |

| Item No. | ITEM | SOCIETY | CITY |
|-----------|---|---------|-----------------------------|
| 5. | Mechanical Systems | | |
| | Electrical Panels, Breakers | | X |
| | Electrical Central Switches | | X |
| | Electrical Fuses | X | |
| | Electrical Receptacles | X | |
| | Heating | X | |
| | Air Conditioning | X | |
| | Water Heater | X | |
| 6. | Roadways/Parking Lots Repair & Maintenance | | |
| | Striping | | X |
| | Handicap Signage | | X |
| | Asphalt Surface, Curbing | | X |
| | Cement Surface, Curbing | | X |
| | Wheel Stops | | X |
| | Drainage | | X |
| | Signs | | X |
| 7. | Fire Equipment | | |
| | Extinguishers | | X |
| | Alarm Systems | | X |
| | Smoke Detectors | | X |
| 8. | Other Items | | |
| | Paper supplies, dispensers waste containers, soap in restrooms and kitchens | X | |
| | Interior janitorial product and services | X | |
| | Interior Floor Waxing, Sweeping | X | |
| | Window Washing (Interior & Exterior) | X | |
| | Exterior sweeping entry, sidewalks, walkways and porches | X | |
| | Janitorial service for Premises | X | |
| | Broken window glass or door glass including plate glass window | X | Exterior of Stow House Only |
| | Refuse, Rubbish and Garbage Disposal | X | |
| | Cleaning Storage Rooms, Utility Rooms | X | |
| | Exterminating | | X |
| | Carpet, Tile and Linoleum Replacement | X | |

EXHIBIT C
AGREEMENT FOR USE OF STOW HOUSE GROUNDS

EXHIBIT D
SCHEDULE OF ACTIVITIES

TO BE PROVIDED BY
GOLETA VALLEY HISTORICAL SOCIETY

EXHIBIT E



City of Goleta, California

Parks Department

130 Cremona Drive, Suite B, Goleta, CA 93117

| | |
|----------|---|
| To: | Alcoholic Beverage Control Board |
| From: | Steven Wagner, Community Services Directors |
| Subject: | Permission to Sell Beer and/or Wine on City of Goleta Park Property |

In accordance with County Ordinance No. 2543, permission is granted to the group named below to sell beer and/or wine on The City of Goleta Park property on the date and time listed below.

Date of Event: _____ Time: _____

Location: _____ Area: _____

Estimated Attendance: _____ Res Confirm #: _____

Approved:

By: _____ Date: _____
Steven Wagner, Community Services Dir.

As the responsible person of the reserving group, I certify that we will observe the rules and regulations pertaining to this event.

Name of Group: _____

Name of Responsible Representative: _____

Address: _____ Telephone: _____

Signature of Representative

Date of Application

**APPENDIX D:
EMG ABBREVIATED ACCESSIBILITY CHECKLIST**

Date Completed: April 27, 2010
Property Name: Rancho La Patera and Stow House
EMG Project Number: 92184.10R-003.052

| Abbreviated Accessibility Checklist | | | | | |
|-------------------------------------|--|-----|----|----|--|
| | Building History | Yes | No | NA | Comments |
| 1 | Has an ADA survey previously been completed for this property? | | X | | |
| 2 | Have any ADA improvements been made to the property? | X | | | Ramp at Packing Shed, doors widened at Garage. |
| 3 | Does a Barrier Removal Plan exist for the property? | | X | | |
| 4 | Has the Barrier Removal Plan been reviewed/approved by an arms-length third party such as an engineering firm, architectural firm, building department, other agencies, etc.? | | | X | |
| 5 | Has building ownership or management received any ADA related complaints that have not been resolved? | | X | | |
| 6 | Is any litigation pending related to ADA issues? | | X | | |
| | Parking | Yes | No | NA | Comments |
| 1 | Are there sufficient accessible parking spaces with respect to the total number of reported spaces? | X | | | |
| 2 | Are there sufficient van-accessible parking spaces available (96" wide by 96" aisle)? | | X | | |
| 3 | Are accessible spaces marked with the International Symbol of Accessibility? Are there signs reading "Van Accessible" at van spaces? | X | X | | No van accessible space or sign. |
| 4 | Is there at least one accessible route provided within the boundary of the site from public transportation stops, accessible parking spaces, passenger loading zones, if provided, and public streets and sidewalks? | | X | | No accessible route from the public right-of-way to the buildings. |
| 5 | Do curbs on the accessible route have depressed, ramped curb cuts at drives, paths, and drop-offs? | | | X | |
| 6 | Does signage exist directing you to accessible parking and an accessible building entrance? | | X | | |

| Abbreviated Accessibility Checklist | | | | | |
|-------------------------------------|---|-----|----|----|--|
| | Ramps | Yes | No | NA | Comments |
| 1* | If there is a ramp from parking to an accessible building entrance, does it meet slope requirements? (1:12) | X | | | Ramp at rear of Packing Shed. Ramp at restrooms. |
| 2 | Are ramps longer than 6 ft complete with railings on both sides? | X | | | |
| 3 | Is the width between railings at least 36 inches? | X | | | |
| 4 | Is there a level landing for every 30 ft horizontal length of ramp, at the top and at the bottom of ramps and switchbacks? | X | | | |
| | Entrances/Exits | Yes | No | NA | Comments |
| 1 | Is the main accessible entrance doorway at least 32 inches wide? | X | | | |
| 2 | If the main entrance is inaccessible, are there alternate accessible entrances? | X | | | Packing Shed accessible entrance is in the rear. |
| 3 | Can the alternate accessible entrance be used independently? | X | | | |
| 4 | Is the door hardware easy to operate (lever/push type hardware, no twisting required and not higher than 48 inches above the floor)? | X | | | |
| 5 | Are main entry doors other than revolving door available? | X | | | |
| 6 | If there are two main doors in series, is the minimum space between the doors 48 inches plus the width of any door swinging into the space? | | | X | |
| | Paths of Travel | Yes | No | NA | Comments |
| 1 | Is the main path of travel free of obstruction and wide enough for a wheelchair (at least 36 inches wide)? | X | | | |
| 2 | Does a visual scan of the main path reveal any obstacles (phones, fountains, etc.) that protrude more than 4 inches into walkways or corridors? | | X | | |

| Abbreviated Accessibility Checklist | | | | | |
|-------------------------------------|--|-----|----|----|--|
| | Paths of Travel | Yes | No | NA | Comments |
| 3 | Is at least one wheelchair-accessible public telephone available? | | | X | |
| 4 | Are wheelchair-accessible facilities (toilet rooms, exits, etc.) identified with signage? | X | | | |
| 5 | Is there a path of travel that does not require the use of stairs? | | X | | Access to Stow house requires use of stairs. Interior path of travel has stairs. |
| | Elevators | Yes | No | NA | Comments |
| 1 | Do the call buttons have visual signals to indicate when a call is registered and answered? | | | X | |
| 2 | Is the "UP" button above the "DOWN" button? | | | X | |
| 3 | Are there visual and audible signals inside cars indicating floor change? | | | X | |
| 4 | Are there standard raised and Braille marking on both jambs of each hoist way entrance? | | | X | |
| 5 | Do elevator doors have a reopening device that will stop and reopen a car door if an object or a person obstructs the door? | | | X | |
| 6 | Do elevator lobbies have visual and audible indicators of car arrival? | | | X | |
| 7 | Are elevator controls low enough to be reached from a wheelchair (48 inches front approach/54 inches side approach)? | | | X | |
| 8 | Are elevator control buttons designated by Braille and by raised standard alphabet characters (mounted to the left of the button)? | | | X | |
| 9 | If a two-way emergency communication system is provided within the elevator cab, is it usable without voice communication? | | | X | |

| Abbreviated Accessibility Checklist | | | | | |
|-------------------------------------|--|-----|----|----|----------|
| | Toilet Rooms | Yes | No | NA | Comments |
| 1 | Are common area public restrooms located on an accessible route? | X | | | |
| 2 | Are pull handles push/pull or lever type? | X | | | |
| 3 | Are there audible and visual fire alarm devices in the toilet rooms? | | | X | |
| 4 | Are corridor access doors wheelchair-accessible (at least 32 inches wide)? | X | | | |
| 5 | Are public restrooms large enough to accommodate a wheelchair turnaround (60" turning diameter)? | X | | | |
| 6 | In unisex toilet rooms, are there safety alarms with pull cords? | | | X | |
| 7 | Are toilet stall doors wheelchair accessible (at least 32" wide)? | X | | | |
| 8 | Are grab bars provided in toilet stalls? | X | | | |
| 9 | Are sinks provided with clearance for a wheelchair to roll under (29" clearance)? | X | | | |
| 10 | Are sink handles operable with one hand without grasping, pinching or twisting? | X | | | |
| 11 | Are exposed pipes under sink sufficiently insulated against contact? | X | | | |
| | Guest Rooms | Yes | No | NA | Comments |
| 1 | Are there sufficient reported accessible sleeping rooms with respect to the total number of reported guestrooms? | | | X | |

| Abbreviated Accessibility Checklist | | | | | |
|-------------------------------------|---|-----|----|----|----------|
| | Guest Rooms | Yes | No | NA | Comments |
| 2 | Are there sufficient reported accessible rooms with roll-in showers with respect to the total number of reported accessible guestrooms? | | | X | |

*Based on visual observation only. The slope was not confirmed through measurements.

**APPENDIX E:
PRE SURVEY QUESTIONNAIRE**

PROPERTY CONDITION ASSESSMENT : PRE-SURVEY QUESTIONNAIRE

This questionnaire must be completed by the property owner, the owner's designated representative, or someone knowledgeable about the subject property. **The completed form must be presented to EMG's Field Observer on the day of the site visit.** If the form is not completed, EMG's Project Manager will require **additional time** during the on-site visit with such a knowledgeable person in order to complete the questionnaire. During the site visit, EMG's Field Observer may ask for details associated with selected questions. This questionnaire will be utilized as an exhibit in EMG's final Property Condition Report.

Name of person completing questionnaire: James Kyriaco Jr.

Association with property: Executive Director, Goleta Valley Historical Society

Length of association with property: 2 years

Date Completed: April 27, 2010

Phone Number: 805.681.7216

Property Name: Rancho La Patera and Stow House

EMG Project Number: 92184.10R-003.052

Directions: Please answer all questions to the best of your knowledge and in good faith. Please provide additional details in the Comments column, or backup documentation for any Yes responses.

| INSPECTIONS | | DATE LAST INSPECTED | LIST ANY OUTSTANDING REPAIRS REQUIRED |
|-------------|--|--|---------------------------------------|
| 1 | Elevators | NA | |
| 2 | HVAC, Mechanical, Electric, Plumbing | NA | |
| 3 | Life-Safety/Fire | | |
| 4 | Roofs | | |
| QUESTION | | RESPONSE | |
| 5 | List any major capital improvement within the last three years. | Garage, Bunk House and Packing Shed completely renovated and seismically retrofitted in 2006-7. Caretaker's Residence, new kitchen in 2008, new bath 2007. | |
| 6 | List any major capital expenditures planned for the next year. | None | |
| 7 | What is the age of the roof(s)? | All 3-4 years old except Stow house 15-20 years old. | |
| 8 | What building systems (HVAC, roof, interior/exterior finishes, paving, etc.) are the responsibilities of the tenant to maintain and replace? | All | |

Mark the column corresponding to the appropriate response. Please provide additional details in the Comments column, or backup documentation for any Yes responses. (NA indicates "Not Applicable", Unk indicates "Unknown")

| QUESTION | | RESPONSE | | | | COMMENTS |
|----------|--|----------|---|-----|----|---|
| | | Y | N | Unk | NA | |
| 9 | Are there any unresolved building, fire, or zoning code issues? | | X | | | |
| 10 | Are there any "down" or unusable units? | | X | | | |
| 11 | Are there any problems with erosion, stormwater drainage or areas of paving that do not drain? | X | | | | Water ponding and flooding at the front and side of the Bunk House. |
| 12 | Is the property served by a private water well? | | X | | | |
| 13 | Is the property served by a private septic system or other waste treatment systems? | | X | | | |
| 14 | Are there any problems with foundations or structures? | | X | | | |
| 15 | Is there any water infiltration in basements or crawl spaces? | X | | | | Stow house has sump pump to remove water from crawl space. |
| 16 | Are there any wall, or window leaks? | X | | | | Stow house. |
| 17 | Are there any roof leaks? | X | | | | Stow house. |
| 18 | Is the roofing covered by a warranty or bond? | | | | | |
| 19 | Are there any poorly insulated areas? | X | | | | Stow house. |
| 20 | Is Fire Retardant Treated (FRT) plywood used? | | | X | | |
| 21 | Is exterior insulation and finish system (EIFS) or a synthetic stucco finish used? | | | | X | |
| 22 | Are there any problems with the utilities, such as inadequate capacities? | | X | | | |
| 23 | Are there any problems with the landscape irrigation systems? | | X | | | |
| 24 | Has a termite/wood boring insect inspection been performed within the last year? | X | | | | |
| 25 | Do any of the HVAC systems use R-11, 12, or 22 refrigerants? | | | X | | |

Mark the column corresponding to the appropriate response. Please provide additional details in the Comments column, or backup documentation for any Yes responses. (NA indicates "Not Applicable", Unk indicates "Unknown")

| QUESTION | | RESPONSE | | | | COMMENTS |
|----------|---|----------|---|-----|----|---|
| | | Y | N | Unk | NA | |
| 26 | Has any part of the property ever contained visible suspect mold growth? | | X | | | |
| 27 | Is there a mold Operations and Maintenance Plan? | | X | | | |
| 28 | Have there been indoor air quality or mold related complaints from tenants? | | X | | | |
| 29 | Is polybutylene piping used? | | | X | | |
| 30 | Are there any plumbing leaks or water pressure problems? | | X | | | |
| 31 | Are there any leaks or pressure problems with natural gas service? | | X | | | |
| 32 | Does any part of the electrical system use aluminum wiring? | | X | | | |
| 33 | Do Residential units have a less than 60-Amp service? | | X | | | |
| 34 | Do Commercial units have less than 200-Amp service? | | X | | | |
| 35 | Are there any recalled fire sprinkler heads (Star, GEM, Central, Omega)? | | | | X | |
| 36 | Is there any pending litigation concerning the property? | | X | | | |
| 37 | Has the management previously completed an ADA review? | | X | | | |
| 38 | Have any ADA improvements been made to the property? | X | | | | Ramp at Packing Shed. Raised floor in one room. Door widened at Garage. |
| 39 | Does a Barrier Removal Plan exist for the property? | | X | | | |
| 40 | Has the Barrier Removal Plan been approved by an arms-length third party? | | | | X | |
| 41 | Has building ownership or management received any ADA related complaints? | | X | | | |
| 42 | Does elevator equipment require upgrades to meet ADA standards? | | | | X | |
| 43 | Are there any problems with exterior lighting? | X | | | | Not enough. |

Mark the column corresponding to the appropriate response. Please provide additional details in the Comments column, or backup documentation for any Yes responses. (NA indicates "Not Applicable", Unk indicates "Unknown")

| QUESTION | | RESPONSE | | | | COMMENTS |
|----------|---|----------|---|-----|----|----------|
| | | Y | N | Unk | NA | |
| 44 | Are there any other significant issues/hazards with the property? | | X | | | |
| 45 | Are there any unresolved construction defects at the property? | | X | | | |

PROPERTY CONDITION ASSESSMENT: DOCUMENT REQUEST

On the day of the site visit, provide EMG's Field Observer access to all of the available documents listed below. Provide copies if possible.

Your timely compliance with this request is greatly appreciated.

- All available construction documents (blueprints) for the original construction of the building or for any tenant improvement work or other recent construction work.
- A site plan, preferably 8 1/2" X 11", which depicts the arrangement of buildings, roads, parking stalls, and other site features.
- For commercial properties, provide a tenant list which identifies the names of each tenant, vacant tenant units, the floor area of each tenant space, and the gross and net leasable area of the building(s).
- For apartment properties, provide a summary of the apartment unit types and apartment unit type quantities, including the floor area of each apartment unit as measured in square feet.
- For hotel or nursing home properties, provide a summary of the room types and room type quantities.
- Copies of Certificates of Occupancy, building permits, fire or health department inspection reports, elevator inspection certificates, roof or HVAC warranties, or any other similar, relevant documents.
- The names of the local utility companies which serve the property, including the water, sewer, electric, gas, and phone companies.
- The company name, phone number, and contact person of all outside vendors who serve the property, such as mechanical contractors, roof contractors, fire sprinkler or fire extinguisher testing contractors, and elevator contractors.
- A summary of recent (over the last 5 years) capital improvement work which describes the scope of the work and the estimated cost of the improvements. Executed contracts or proposals for improvements. Historical costs for repairs, improvements, and replacements.
- Records of system & material ages (roof, MEP, paving, finishes, and furnishings).
- Any brochures or marketing information.
- Appraisal, either current or previously prepared.
- Current occupancy percentage and typical turnover rate records (for commercial and apartment properties).
- Previous reports pertaining to the physical condition of property.
- ADA survey and status of improvements implemented.
- Current / pending litigation related to property condition.

**APPENDIX F:
TERMINOLOGY**

The following are definitions of terms utilized in this report.

| TERMINOLOGY | |
|------------------------------------|--|
| Actual Knowledge | Information or observations known first hand by EMG. |
| ADA | The Americans with Disabilities Act |
| Ancillary Structures | Structures that are not the primary improvements of the Property but which may have been constructed to provide support uses. |
| Appropriate Inquiry | A request for information from appropriate entity conducted by a Freedom of Information Letter (FOIL), verbal request, or by written request made either by fax, electronic mail, or mail. A good-faith one time effort conducted to obtain the information in light of the time constraints to deliver the FRS. |
| ASTM | American Society for Testing and Materials |
| Base Building | That portion of the building (common area) and its systems that are not typically subject to improvements to suit tenant requirements. |
| Baseline | A minimum scope level of observation, inquiry, research, documentation review, and cost estimating for conducting a Facility Reserve Study as normally conducted by EMG. |
| BOMA | Building Owners and Managers Association |
| Building | Referring to the primary building or buildings on the Property, which are within the scope of the FRS as defined under Section 2. |
| Building Codes | A compilation of rules adopted by the municipal, county and/or state governments having jurisdiction over the Property that govern the property's design and/or construction of buildings. |
| Building Department Records | Information concerning the Property's compliance with applicable Building, Fire and Zoning Codes that is readily available for use by EMG within the time frame required for production of the Property Condition Assessment. |
| Building Systems | Interacting or interdependent components that comprise a building such as structural, roofing, side wall, plumbing, HVAC, water, sanitary sewer and electrical systems. |
| BUR | Built Up Roof |
| Client | The entity identified on the cover of this document as the Client. |
| Commercial Real Estate | Real property used for industrial, retail, office, agricultural, other commercial, medical, or educational purposes, and property used for residential purposes that has more than four (4) residential dwelling units. |
| Commercial Real Estate Transaction | The transfer of either a mortgage, lease, or deed; the re-financing of a commercial property by an existing mortgagee; or the transferring of an equity interest in commercial property. |
| Component | A piece of equipment or element in its entirety that is part of a system. |
| Consultant | The entity or individual that prepares the Facility Reserve Study and that is responsible for the observance of, and reporting on the physical condition of Commercial Property. |
| Dangerous or Adverse Conditions | Situations which may pose a threat or possible injury to the Project Manager, or those situations which may require the use of special protective clothing, safety equipment, access equipment, or any precautionary measures. |
| Deferred Maintenance | Deficiencies that result from postponed maintenance, or repairs that have been put off until a later time and that require repair or replacement to an acceptable condition relative to the age of the system or property. |
| Dismantle | To take apart; disassemble; tear down any component, device or piece of equipment that is bolted, screwed, secured, or fastened by other means. |
| DWV | Drainage Waste Ventilation |
| EIFS | Exterior Insulation and Finish System |

| TERMINOLOGY | |
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| EMS | Energy Management System |
| Engineering | Analysis or design work requiring extensive formal education, preparation and experience in the use of mathematics, chemistry, physics, and the engineering sciences as provided by a Professional Engineer licensed to practice engineering by any state of the 50 states. |
| Expected Useful Life (EUL) | The average amount of time in years that a system or component is estimated to function when installed new. |
| FEMA | Federal Emergency Management Agency |
| FFHA | Federal Fair Housing Act |
| Fire Department Records | Information generated or acquired by the Fire Department having jurisdiction over the Property, and that is readily available to EMG within the time frame required for production of the FRS. |
| FIRM | Flood Insurance Rate Maps |
| FM | Factory Mutual |
| FOIA | U.S. Freedom of Information Act (5 USC 552 et seq.) |
| FOIL | Freedom of Information Letter |
| FRT | Fire Retardant Treated |
| FRS | Facility Reserve Study that includes a Property Condition Assessment, the Purpose and Scope of which is defined in Section 2 of this report. |
| Guide | A series of options or instructions that do not recommend a specific course of action. |
| His | Referring to either a male or female Project Manager, or individuals interviewed by the Project Manager. |
| HVAC | Heating, Ventilating and Air-conditioning |
| IAQ | Indoor Air Quality |
| Immediate Repairs | Physical deficiencies that require immediate action as a result of: (i) existing or potentially material unsafe conditions, (ii) significant negative conditions impacting tenancy/marketability, (iii) material building code violations, or (iv) poor or deteriorated condition of critical element or system, or (v) a condition that if left "as is", with an extensive delay in addressing same, has the potential to result in or contribute to critical element or system failure within one (1) year. |
| Interviews | Interrogatory with those knowledgeable about the Property. |
| Material | Having significant importance or great consequence to the asset's intended use or physical condition. |
| MEP | Mechanical, Electrical, and Plumbing |
| NFPA | National Fire Protection Association |
| Observations | The results of the Project Manager's Walk-through Survey. |
| Observe | The act of conducting a visual, unaided survey of items, systems or conditions that are readily accessible and easily visible on a given day as a result of the Project Manager's walk-through. |
| Obvious | That which is plain or evident; a condition that is readily accessible and can be easily seen by the Project Manager as a result of his Walk-through without the removal of materials, moving of chattel, or the aid of any instrument, device, or equipment. |
| Owner | The entity holding the deed to the Property that is the subject of the FRS. |

| TERMINOLOGY | |
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| Physical Deficiency | <p>Patent, conspicuous defects, or significant deferred maintenance of the Property's material systems, components, or equipment as observed during the Project Manager's Walk-through Survey.</p> <p>Material systems, components, or equipment that are approaching, have realized, or have exceeded their typical Expected Useful Life (EUL); or, that have exceeded their useful life result of abuse, excessive wear and tear, exposure to the elements, or lack of proper or adequate maintenance.</p> <p>This definition specifically excludes deficiencies that may be remedied with routine maintenance, miscellaneous repairs, normal operating maintenance, and conditions that do not present a material deficiency to the Property.</p> |
| PML | Probable Maximum Loss |
| Practically Reviewable | Information that is practically reviewable means that the information is provided by the source in a manner and form that, upon examination, yields information relevant to the property without the need for extraordinary analysis of irrelevant data. |
| Practice | A definitive procedure for performing one or more specific operations or functions that does not produce a test result. |
| Primary Improvements | The site and building improvements that are of fundamental importance with respect to the Property. |
| Project Manager | The individual Professional Engineer or Registered Architect having a general, well rounded knowledge of all pertinent site and building systems and components that conducts the on-site visit and walk-through observation. |
| Property | The site and building improvements, which are specifically within the scope of the FRS to be prepared in accordance with the agreement between the Client and EMG. |
| Readily Accessible | Those areas of the Property that are promptly made available for observation by the Project Manager without the removal of materials or chattel, or the aid of any instrument, device, or equipment at the time of the Walk-through Survey. |
| Reasonably Ascertainable | Information that is publicly available, provided to EMG's offices from either its source or an information research/retrieval concern, practically reviewable, and available at a nominal cost for either retrieval, reproduction or forwarding. |
| Recreational Facilities | Spas, saunas, steam baths, swimming pools, tennis courts, playground equipment, and other exercise, entertainment, or athletic facilities. |
| Remaining Useful Life (RUL) | <p>The consultant's professional opinion of the number of years before a system or component will require replacement or reconditioning. The estimate is based upon observation, available maintenance records, and accepted EUL's for similar items or systems.</p> <p>Inclement weather, exposure to the elements, demand on the system, quality of installation, extent of use, and the degree and quality of preventive maintenance exercised are all factors that could impact the RUL of a system or component. As a result, a system or component may have an effective age greater or less than its actual age. The RUL may be greater or less than its Expected Useful Life (EUL) less actual age.</p> |
| Replacement Costs | Costs to replace the system or component "in kind" based on Invoices or Bid Documents provided by the current owner or the client, construction costs developed by construction resources such as <i>Means</i> and <i>Dodge</i> , EMG's experience with past costs for similar properties, or the current owner's historical incurred costs. |
| Replacement Reserves | Major recurring probable expenditures, which are neither commonly classified as an operation or maintenance expense. Replacement Reserves are reasonably predictable both in terms of frequency and cost. However, they may also include components or systems that have an indeterminable life but nonetheless have a potential liability for failure within the reserve term. |

| TERMINOLOGY | |
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| RTU | Rooftop Unit |
| RUL | Remaining Useful Life (See definition) |
| Shut-Down | Equipment or systems that are not operating at the time of the Project Manager's Walk-through Survey. Equipment or systems may be considered shutdown if it is not in operation as a result of seasonal temperatures. |
| Significant | Important, material, and/or serious. |
| Site Visit | The visit to the property by EMG's Project Manager including walk-through visual observations of the Property, interviews of available project personnel and tenants (if appropriate), review of available documents and interviews of available municipal personnel at municipal offices, all in accordance with the agreement for the Property Condition Assessment. |
| Specialty Consultants | Practitioners in the fields of engineering, architecture; or, building system mechanics, specialized service personnel or other specialized individuals that have experience in the maintenance and repair of a particular building component, equipment, or system that have acquired detailed, specialized knowledge in the design, assessment, operation, repair, or installation of the particular component, equipment, or system. |
| Structural Component | A component of the building, which supports non-variable forces or weights (dead loads) and variable forces or weights (live loads). |
| Suggested Remedy | A preliminary opinion as to a course of action to remedy or repair a physical deficiency. There may be alternate methods that may be more commensurate with the Client's requirements. Further investigation might make other schemes more appropriate or the suggested remedy unworkable. The suggested remedy may be to conduct further research or testing, or to employ Specialty Consultants to gain a better understanding of the cause, extent of a deficiency (whether observed or highly probable), and the appropriate remedy. |
| Survey | Observations as the result of a walk-through scan or reconnaissance to obtain information by EMG of the Property's readily accessible and easily visible components or systems. |
| System | A combination of interacting or interdependent components assembled to carry out one or more functions. |
| Technically Exhaustive | The use of measurements, instruments, testing, calculations, exploratory probing or discover, and/or other means to discover and/or troubleshoot Physical Deficiencies, develop scientific or Engineering findings, conclusions, and recommendations. Such efforts are not part of this report unless specifically called for under Section 2.2. |
| Term | Reserve Term: The number of years that Replacement Reserves are projected for as specified in the Replacement Reserves Cost Estimate. |
| Timely Access | Entry provided to the Project Manager at the time of his site visit. |
| UST | Underground Storage Tank |
| Walk-through Survey | The Project Manager's site visit of the Property consisting of his visual reconnaissance and scan of readily accessible and easily visible components and systems. This definition connotes that such a survey should not be considered in depth, and is to be conducted without the aid of special protective clothing, exploratory probing, removal of materials, testing, or the use of special equipment such as ladders, scaffolding, binoculars, moisture meters, air flow meters, or metering/testing equipment or devices of any kind. It is literally the Project Manager's walk of the Property and observations. |

**APPENDIX G:
RESUMES FOR REPORT REVIEWER AND FIELD
OBSERVER**

MATTHEW F. ANDERSON, RA

Program Manager

Education

- Denmark's International Studies Program, Copenhagen Denmark, 1981
- Bachelor of Architecture from California Polytechnic State University, 1982

Project Experience

- **Hotel Portfolio Purchase, National** -- Mr. Anderson led the engineering review team during the review of a 21 property hotel purchase. The properties were in locations throughout the eastern part of the country.
- **Hotel Portfolio Sale** – Mr. Anderson led the engineering review team during the sale of 32 national and international hotels by one company to multiple buyers. The scope of work was completed in 30 days.
- **Multi Family Portfolio Purchase** - Mr. Anderson led the engineering review team during the evaluation of 4 apartment complexes containing over 1,400 units. The evaluations included individual reviews of over 900 apartments. During substantial renovation work after the sale EMG provided construction monitoring for the purchaser.
- **Office Portfolio Purchase** - Mr. Anderson led the engineering review team during the evaluation of 45 medical office buildings located throughout the country. After the purchase the reports were modified in accordance with a national lender's guidelines as part of the financing package.
- **Childcare Facilities** – Mr. Anderson has provided multiple types of services to various organizations over a number of years. His work has included review of sites prior to purchase to identify deferred maintenance, defense of claims by property owners of leased properties, and corporate training to corporate staff members in ADA assessments.

Industry Tenure

- A/E: 1982
- EMG: July, 1998-2006
2008 to present

Related Experience

- Multifamily Housing Portfolios
- Instructor at ADA training seminars
- Project Manager Trainer

Industry Experience

- Healthcare
- Hospitality
- Retail
- Multi-Family

Special Skills & Training

- EPA Asbestos Assessor Training, 1999
- Trained in HUD MAP Program process

Active Licenses/Registration

- California Registered Architect since 1985

Regional Location

- Santa Rosa, CA

ARTHUR M. BALOURDAS*Project Manager****Education***

- Master of Architecture, University of Illinois at Chicago, 1982
- BS, Architecture, The Ohio State University, 1980

Project Experience

- ***U.S. Department of Housing and Urban Development (HUD), San Francisco, California*** – Under two consecutive five-year Technical Disciplines contracts with the U.S. Department of Housing and Urban Development (HUD), Mr. Balourdas performed, and managed the performance of, construction monitoring inspections and technical disciplines review of plans, specifications and costs of new and rehabilitation multi-family developments receiving government cash advance grants (Section 202/811) and mortgage insurance (Section 221d). The work was performed for the San Francisco regional office of HUD for projects the states of California, Hawaii and Nevada.
- ***HUD 223f Multi-family Property Condition Assessments, California*** – Mr. Balourdas performed property condition assessments/capital needs assessments for 100's of multi-family units undergoing refinancing utilizing Section 223f government mortgage. Assessments were performed for multiple clients including GMAC, Bank of America, PFC, and others.
- ***Simply Kids Convalescent Hospital, Elk Grove, California***– As a Project Manager, Mr. Balourdas performed a property condition assessment of this 106 bed convalescent care hospital. He reviewed the condition of the building structure and systems and developed a thorough report. His work helped EMG complete this project on schedule and within the budget.
- ***Hampstead Partners, La Jolla, California*** – As the Director of Architecture and Planning for affordable housing developer Hampstead Partners, Mr. Balourdas was responsible for the preparation and management of rehabilitation plans for numerous multi-family housing project acquisitions and rehabilitations throughout the US. Mr. Balourdas' duties included managing physical due diligence investigations, preparation of conceptual and final rehabilitation plans, acting as the owner's representative during construction and performing construction administration and monitoring for the projects.

Industry Tenure

- A/E: 1980
- EMG: 2010

Related Experience

- Multifamily Housing Condition Assessment reports
- Commercial Condition Assessment reports
- Construction Document Review
- Construction Monitoring and Administration
- Site Planning
- Architectural Design

Industry Experience

- Office
- Industrial
- Housing/Multi-family
- Housing/Subsidized and Affordable Multi-family
- Hospitality
- Retail/Wholesale

Active Licenses/Registration

- California Registered Architect C15734, Maryland Registered Architect 13268, DC Registered Architect ARC 101100, NCARB Certified, 2003
- California State Office of Emergency Services Disaster Damage Assessment Inspector

Special Skills & Training

- Fluent in Greek

Regional Location

- San Diego, CA