



## **OPEN SESSION**

### **REGULAR OPEN MEETING OF THIRD LAGUNA WOODS MUTUAL ARCHITECTURAL CONTROL AND STANDARDS COMMITTEE**

**Tuesday, March 23, 2021 – 10:30AM  
VIRTUAL MEETING**

Laguna Woods Village owners/residents are welcome to participate in all open committee meetings and submit comments or questions regarding virtual meetings using one of three options:

1. Via Zoom : <https://zoom.us/j/93156707417>
2. Via email to [meeting@vmsinc.org](mailto:meeting@vmsinc.org) any time before the meeting is scheduled to begin or during the meeting. Please use the name of the committee in the subject line of the email. Name and unit number must be included.
3. By calling (949) 268-2020 beginning one half hour before the meeting begins and throughout the remainder of the meeting. You must provide your name and unit number.

### **NOTICE and AGENDA**

*This Meeting May Be Recorded*

1. Call to Order
2. Acknowledgement of Media
3. Approval of Agenda
4. Approval of Meeting Minutes – Monday February 22, 2021
5. Chair's Remarks
6. Member Comments - (Items Not on the Agenda)
7. Division Manager Update

### **Consent:**

*All matters listed under the Consent Calendar are considered routine and will be enacted by the Committee by one motion. In the event that an item is removed from the Consent Calendar by members of the Committee, such item(s) shall be the subject of further discussion and action by the Committee.*

### **Items for Discussion:**

8. Asbestos Rules & Regulations Meeting
9. Contractor Newsletter (Attachment #1)
10. Staff Hire Memo (Attachment #2)
11. Permit SOP and Website Integration (Attachment #3)
12. Permitless Proposal - Website Display

### **Items for Future Discussion & Agendas:**

- Standard Details Update Cost Estimates

### **Concluding Business:**

13. Committee Member Comments
14. Date of Next Meeting – April 26, 2021
15. Adjournment

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**OPEN MEETING**

**REGULAR OPEN MEETING OF THE THIRD LAGUNA WOODS MUTUAL  
ARCHITECTURAL CONTROL AND STANDARDS COMMITTEE**

Monday, February 22, 2021 - 9:30 AM  
Laguna Woods Village Community Center (Virtual GoToMeeting)  
24351 El Toro Road, Laguna Woods, CA 92637

**REPORT**

**COMMITTEE MEMBERS PRESENT:** Chair Steve Parson, Jon Frankel, Ralph Engdahl, Robert Mutchnick,  
Craig Wayne

**DIRECTORS PRESENT:**

**COMMITTEE MEMBERS ABSENT:** Reza Karimi

**ADVISORS PRESENT:** Mike Butler, Mike Plean

**STAFF PRESENT:** Robbi Doncost, Lauryn Varnum, Gavin Fogg, Richard DeLaFuentes

**1. Call to Order**

Chair Parsons called the meeting to order at 9:41am.

**2. Acknowledgement of Media**

None present.

**3. Approval of Agenda**

Chair Parsons moved to accept the agenda, Director Mutchnick seconded.

**4. Approval of Meeting Report for February 22, 2021**

The committee approved the meeting report as presented.

**5. Chair's Remarks**

Chair Parsons inquired if the Permitless Alteration proposal was approved by the United ACSC and United Board. Staff Officer Doncost confirmed that it has been approved.

**6. Member Comments - (Items Not on the Agenda)**

None.

**7. Manor Alterations Division Update**



Mr. Doncost updated the current status of the Manor Alterations staff, with the onboarding of multiple staff, including a new inspector. Mr. Doncost further explained the updates coming to the VMS website, a conveyor belt system of processing requests, and a full log updated bi-weekly which will be posted to the VMS website.

#### **Consent:**

*All matters listed under the Consent Calendar are considered routine and will be enacted by the Committee by one motion. In the event that an item is removed from the Consent Calendar by members of the Committee, such item(s) shall be the subject of further discussion and action by the Committee.*

#### **8. Status of Mutual Consents**

Mr. Doncost explained that the onboarding and training of staff has resulted in a reduced wait time, reduction in backlog, and that MA has started to involve other departments to create metrics.

Director Parsons inquired as to the ration of Open v Closed permits. Mr. Doncost explained that once a permit is open, it may remain open for extended periods of time due to completion of work. Director Mutchnick requested a breakdown of incoming inquiries, classification of permits, quantity of variances, etc. Director Plean requested to have the information disseminated between Third Mutual and United Mutual, and inquired as to when the counter would be open, as in-person appointments are much more effective. Director Mutchnick discussed the Classification system proposed by the Permitless Alteration, explaining that the committee would require further review before approving.

#### **Items for Discussion**

#### **9. Ongoing Communication with 3<sup>rd</sup> Party Vendors and Community Members**

Mr. Doncost summarized how MA is meeting with Tech Support and the Website Team to update forms available via the website. Discussion ensued on the efficacy of the Permitless Alteration Proposal, and the potential adjustment of alteration fees, including variances. Mr. Doncost explained that adjusting fees is involved within the proposal being reviewed by M&C Committee and the ACSC committees. Staff Officer Fogg gave a historical account of fee adjustment, but these are required to be approved by the Board. Mr. Doncost discussed the full breadth of work required for a variance, and for the initiation of a newsletter within the next 2-3 weeks.

#### **10. Asbestos Rules & Regulations Meeting**

Mr. Doncost explained that United ACSC cancelled the meeting due to AQMD denying MA's request for a speaker. Director Parsons requested to move forward with the meeting regardless of AQMD's presence.

#### **Variance Requests:**

11. Variance Request - Mr. and Mrs. York and Angela Bennett of 3493-C (La Quinta, LH06) – Request to Retain Removing an Interior Bearing Wall Between the Kitchen and Living Room



Mr. Doncost introduced Staff Officer Richard DeLaFuenta who gave a summary of the Variance Request. After discussion ensued, Director Parsons made a motion to approve the Variance Request, which passed with no objection, however Director Mutchnick approved with the caveat that Mr. Doncost be present while the City representative and contractors meet onsite.

**Items for Future Agendas:**

- **Standard Details Update – Cost Estimates**
- **Path to Provide More Information to Members**

Chair Parsons requested more information be provided to members, such as highlighting weekly standards or material updates. Discussion ensued regarding pathway materials.

**Concluding Business:**

**12. Committee Member Comments:**

No comments were made, however Director Parsons requested committee members review and provide feedback on the Permitless Alteration Proposal.

**13. Date of Next Meeting – March 22, 2021**

**14. Adjournment at 11:01 AM**

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Steve Parsons, Chair

Robbi Doncost, Staff Officer

Telephone: (949) 268-2281

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News Bulletin: 21-01  
March 14, 2021

## Manor Alterations News

### Welcome to Our Biweekly News Bulletin

The intent of this news bulletin is to better inform members, realtors and contractors regarding important Manor Alterations issues. It will address specific content and be distributed via email every two weeks. The information shared is not intended to be all inclusive, but many of the topics covered will be explained in greater detail in future editions.

News bulletin topics will address overall news, rules changes in effect or expected changes, expected changes in insurance requirements, new team members and backlog status. Further, the bulletin includes a spreadsheet denoting the status of permits submitted for approval.

This news bulletin is a work in progress. If we have omitted information you believe should be included, please share your feedback by emailing [alterations@vmsinc.org](mailto:alterations@vmsinc.org).

### General Update

Wait times in Manor Alterations for application inquiries, as well as phone and email communications, have been drastically reduced to less than two days. Also, permit issuance time has been reduced across the spectrum of permit types.

A new permit classification system—Class I, Class II and Class III—has been implemented and staff has established a “conveyor” type system of communication, system information and permit issuance leading to a log for all to view. Please visit [\[website link here\]](#) to view the log. Additional information regarding the permit classification system will be shared in future editions.

### Changes to Rules in Effect/Expected Changes

At this time, Manor Alterations is implementing a permitless alterations policy for United Mutual members only. This initiative provides United members the opportunity to make minor alterations within their manor/unit without the need for a permit. Please [click here](#) or visit [lagunawoodsvillage.com/residents/resident-services#manor-alterations](http://lagunawoodsvillage.com/residents/resident-services#manor-alterations) to view the form.

### Six-Month Variance Moratorium (United Only)

Future consideration regarding suspending variance reviews is to go in effect on April 9. No variance moratorium is in place at this time.

### Track Current Response Times

Below is the general turnaround time for current correspondence reply and permit processing:

- Return phone call - Two days
- Email - Two to three days
- Completed permit: Five to 14 days, depending on whether permit is Class I, Class II or Class III (Class III requires longer periods of review). Additional information regarding the permit classification system will be shared in future editions.

## Permit Status

Please [click here](#) to view permit status, which is updated every two weeks. If your permit is not shown on the spreadsheet, it is not yet in the queue. Please contact us if you believe your permit should be on this list.

## New Team Members

- **Operations Specialists:** Noell Ahern, Andrea Cornejo, Kaitlyn Frain and Lauren Olss
- **Third Mutual Inspector:** Richard de la Fuente, AIA
- New Inspector personnel to be considered in the near future

The new team members are undergoing Manor Alterations training and are not up to full speed at this time but are making substantial contributions.

## Contractors

Contractors who wish to receive this information via email must provide their address to Lauryn Varnum at [lauryn.varnum@vmsinc.org](mailto:lauryn.varnum@vmsinc.org). Manor Alterations will send this news bulletin to all contractors as long as we have your current email address on file. All inquiries and permit questions must be routed through the Manor Alterations email address, [alterations@vmsinc.org](mailto:alterations@vmsinc.org). Please do not contact Ms. Varnum for Alteration questions or permit status.

Please note the log provides Manor Alterations permit status only. All contractors must consult with the City of Laguna Woods in regard to city-required permits.

It is important you do not exceed the boundary of work defined in the mutual consent. If work is expanded beyond what is permitted, both contractor and member are subject to potential penalties and governance disciplinary action.

## Insurance Requirements

At this time, no new insurance requirements have been implemented. Please [click here](#) to review our sample COLI sheet to view our standard requirements.

## Realtors

More news is forthcoming in future editions of this bulletin. Manor Alterations wants to encourage owners and realtors to order the first resale inspection as soon as possible to allow for identification of any requirements needed to be completed by the manor owner prior to a closing. This may include but not be limited to the following:



- Non-permitted interior alteration work such as lighting, plumbing and electrical modifications
- Non-permitted exterior common area and exclusive common area work such as pavers, gates and landscaping

Manor Alterations will consider future discussion sessions in which explanations regarding permit processes, first and final inspection reports, and resale closure (from a Manor Alterations perspective) are addressed.

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## STAFF REPORT

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**DATE:** March 23, 2021  
**FOR:** Third Architectural Control & Standards Committee  
**SUBJECT:** Manor Alterations Staff Additions  
Historical Context & Additional Staff Request

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### **RECOMMENDATION**

- I. Recommend to the Board the following full-time permanent positions be added to the Manor Alterations Division (MA):
  1. Counter Staff (2) Operations Specialists,
  2. Phone Staff (2) Operations Specialists,
  3. Resales (1) Float Inspector, and (1) Operation Specialist,
  4. Float Inspector (1).

The above adds seven (7) staff members to the Manor Alterations Division. A financial analysis is provided as Attachment One - Financial Analysis which describes the fiscal impact of the added staff by the valid adjustment of increased fees and fines to the Fee Schedule. Attachment Two - Organization Chart Division 925 is included to graphically depict the added positions within the division. Attachment Three – Revised Fee Schedule indicating modifications to the fees for certain items noted in the Financial Analysis.

- II. Recommend a six (6) month moratorium on Variance review and report preparation.

### **BACKGROUND**

Past circumstances relating to the Pandemic, computer malware issues, and high demands from both resales and mutual consent applications have placed significant stress on the Manor Alterations division operations resulting in long wait times, delays in responding to emails and phone calls, long processing of mutual consents, and resale inspection processing. The following is a more descriptive example of the causes:

#### **Changes Driven by COVID 19:**

- The Pandemic required a drastic change in the standard operational procedures of how applications, payments, and inquiries were managed. In an effort to continue service to members, the public counter was closed and all submittals were then made, and continue to be made, by digital submission. This caused a large dynamic shift in the interaction with the members, contractors, and realtors as follows:

- Member phone calls increased exponentially, creating an unprecedented backlog of calls, resulting in significant delays in responding to phone messages; which in turn created additional phone calls in the queue. The Manor Alterations Division simply does not have adequate staffing to address the new volume of calls and questions resulting from the new Pandemic-operational requirements. This shift to a new digital model will have a permanent impact on the Division's operations which requires additional staffing to address the resulting service deficiency. On average, it requires three or more conversations to explain to members/contractors how to complete an application and explain how the permit process works. This is due to the complex rules and regulations which must be administered by staff on behalf of the two mutuals, which directly affect the architectural, restoration, asbestos regulations, and escrow requirements for the resale of Manors.
- Website changes are needed. Permit submittals require additional processing time as multiple submissions have to be made due to the difficulties the members face when obtaining information from the website. The members are required to download floor plans, certificates of insurance, and mutual consent forms. This information may be difficult to find on the website, and presents a challenge to walk members/contractors through it step-by-step via the phone, requiring significant man-hours to handle in a timely manner.

#### **Changes Driven by Malware:**

- **Website and Application Procedural Revisions:**
  - A prior report requested revisions to the website content and simplification of the location of links for ease of member access and to information. This revisions have been delayed due to the malware problem.
  - Application documents, check lists, asbestos hand-out material, insurance certificate changes, and mutual consent modifications were marked up to better assist in the completion of applications. Many electronic versions of these files were lost during the malware problem prompting a re-type of the forms.
  - Standard details to be revised. United Mutual ACSC agreed to review cost estimates to revise the standard details to facilitate faster review time and expedient counter permit issuance. This revision has also been delayed due to the malware problem.
  - Classification of the permit process was suggested and well received by VMS and the ACSC committees.
    - This new process of classifying the applications into three (3) classes was well received and tied to the standard drawing revision concept. The mutual consents "MC" would be placed into three distinct classifications of either I, II, or III.
    - Their classification was dependent on the complexity of the Scope of Work. The restructuring of the Division's "intake" group would allow Classification I permits to be issued out-right without the burden to inspectors' further review, thereby streamlining the process.

- **Asbestos Containing Materials or “ACM” Management Burden:**
  - Asbestos is known to exist in many buildings in the Village and became a prominent part of mutual concern as early as 2018. It is commonly found in the Village in materials such as stucco, drywall tape and joint compound, floor tile, and tile mastic. The presence of this highly regulated material forced MA to manage the receipt of separate demolition documents to prove the completion of demolition work in accordance with SCAQMD, CalOSHA, and local City guidelines. This procedure is in place to protect the Mutual, members, contractors and VMS employees. This requires additional work and submission from the members of:
    - Issuance of a separate demolition permit
    - Initial ACM testing
    - Air Clearance Testing at work completion
    - Regulated removal and manifest processing
  - The completion of an additional demolition permit adds more time and confusion to the member/contractor. The distinction between the two permits and scope of work requires causes frustration among permit applicants.
  - ACM has caused an additional burden to the mutual consent process and staff manpower allocation.

The above conditions have caused increased phone and consent wait times even with the revisions to mutual consent classifications. The asbestos regulations are governed by SCAQMD and CalOSHA. VMS staff does not add or subtract from these stringent requirements. Staff simply ensures they be met to protect the mutual, staff, and residents. The future website revisions will not dramatically reduce the wait times associated with meeting asbestos requirements. Additional staffing and restructuring of the Manor Alterations Division is required to improve service in this area overall.

## **DISCUSSION**

The long wait times are not the result of a single event and have taken place over a long length of time. Clearly there is not one modification, but changes on many levels, that are needed to decrease wait times in areas of phone inquiry, mutual consent review, and process communications. The addition of staff, reclassification of certain permits (for “over the counter” issuance), and website revision all contribute to cure the current service deficiencies, which will result in a better service experience for the members.

As a temporary measure to assist with the management of the large volume of un-answered email and phone calls VMS is lending existing VMS staff to supplement Manor Alterations. There are four (4) people providing assistance to MA by contributing a total of 32 hours cumulatively per week to answering calls and respond to emails. This has been an asset as the VMS staff is familiar with the Stellar program and can record information in the system. The Manor Alterations Coordinator is providing 8 hours/week to this specific endeavor as well. These added personnel are helping greatly to: 1) acknowledge receipt of resident inquiries and applications; and 2) provide a general timeframe of when their applications will be processed,

and 3) log in information into the Log. This is provided as interim assistance to the members while new staff is hired and trained.

The following are staffing recommendations:

- **Division 925 Intake Revisions:**
  - Promoted Geovany Cortez (completed) to a Sr. Operations Specialist
  - Request of (4) additional staff members for “Intake” supplement to phone and email responses.
  - Request of (1) Float (work between both mutual) Inspector.
- **Division 925 Resales Personnel Revisions:**
  - Add new resales Inspector (1) and Operation Specialist (1).
- **Division 925 Variance Inspector:**
  - Fill this previously approved and budgeted position (not yet filled)

*A complete organization chart for the Manor Alterations Division 925 staff has been assembled and provided with this Report as **Attachment Two**. The suggested new positions are not considered to be a “short-term” solution but will be needed for a “long-term” solution to meeting member service.*

- **Inclusion of Resale Inspections:**
  - Resale inspections and real estate agents’ demands have further burdened the division with expedited requests for closings as unauthorized work continues to occur. Realtors and escrow companies demands have grown exponentially. A Virtual Realtor meeting was held last month in an effort to exchange information to better communication and provide consents in a timely manner.

MA suggested that realtors request a 1<sup>st</sup> Inspection as soon as possible to give MA more time to complete the report and allow the owner to make corrections for a final release. The outcome of this request is not yet known. Adding a new resale inspector and operations specialist positions is a critical component to faster inspection and processing of documents to escrow.

- **Classification of Mutual Consents**

**CLASSIFICATION I** - Elementary permit: This level involves a type of Alterations permit issuance that can be made “over-the-counter” in a one visit or single request to Alterations. Provide minor Stellar program search for any extenuating circumstances. Permits in this classification will only require a final inspection for close-out and no city permit is required. A completed application for Consent, COLI, and permit fee are all that is required. The following are permits allowed in this classification:

1. Solar Tubes, Carport Cabinets, A/C replacements, water heater replacements, minor flooring alterations,
2. Wall Hangers, gates.

Standard Plans Needed: Revisions to details would be of assistance for permit issuance. Many of these current standard details are not legible and the information contained therein should be changed due to erroneous or incomplete information. Revise standard details are needed to update readability, and ease of constructability.

**CLASSIFICATION II – Medium Complexity:** This level involves a type of Alterations permit issuance that would be accepted “over-the-counter” and will require an Alterations Inspector review and approval. Some will require a Demolition permit as well. A City permit is likely required depending on any minor structural and mechanical permits (like plumbing, electrical, mechanical) needed. Permits in this classification will only require an Alterations final inspection for close-out and member submittal of final city permit. However, if a variance of any item is required, then it becomes a Classification III. The following are permits grouped in this classification:

1. Kitchen Renovation, Bathroom Renovation, HVAC unit modifications, Partition Wall modifications,
2. Patio Covers, window replacements, ceiling lighting, mechanical alterations of electrical, HVAC ducting, plumbing (waste and/or water line revisions).
3. Doorway extensions.

**CLASSIFICATION III:** This level involves a type of Alterations permit issuance that must be reviewed in depth by an Inspector. Permits in this classification will require a demolition consent, asbestos monitoring, reporting, and clearances, improvement permit, city permit, and final inspection for close-out. There may be a need for a variance approval and land covenant processing. The following are permits grouped in this classification:

1. Atrium Enclosure, Breakfast Room Addition,
2. Modifications to exclusive common area,
3. Structural modification of any nature,
4. Solar Roof Panels,
5. Garage encroachment build-out.

The above revisions are intending to yield the following results:

Classification I: Processing Timing: 6 Working Days

Water heater, A/C or Heater replacement Like for Like,

Classification II: Processing Timing 14 Working Days

Bathroom splits, Garage Door Replacements, Solar Tube, Kitchen Remodel, Bathroom Remodel.

Classification III: Processing Timing 21 Working Days (not including Mutual processing)

Variances of any kind (suspended for 6 months), full manor renovations, balcony modifications, existing common area modification, new common area modifications

- **Moratorium on New Variance Applications**

The current work load necessitates a reduction in some of the work in an attempt to get past the backlog of prior requests, and to allow education of new staff hired. A typical variance for a patio enclosure, or building structural modification requires on average 17 hours to produce. The process involves site visits, extensive document review,

comment and communications with design professionals, reporting, and project tracking. The Mutual would place a temporary hold of 6 months on all variance requests to allow staff some reduction in the work load.

**Prepared By:** Robbi Doncost – Manor Alterations Manager

**Reviewed By:** Gavin Fogg – Manor Alterations Supervisor

Ernesto Munoz – Maintenance & Construction Director

**ATTACHMENT(S)**

**Attachment One – Financial Analysis**

**Attachment Two - Organization Chart Division 925**

**Attachment Three – Revised Fee Schedule**

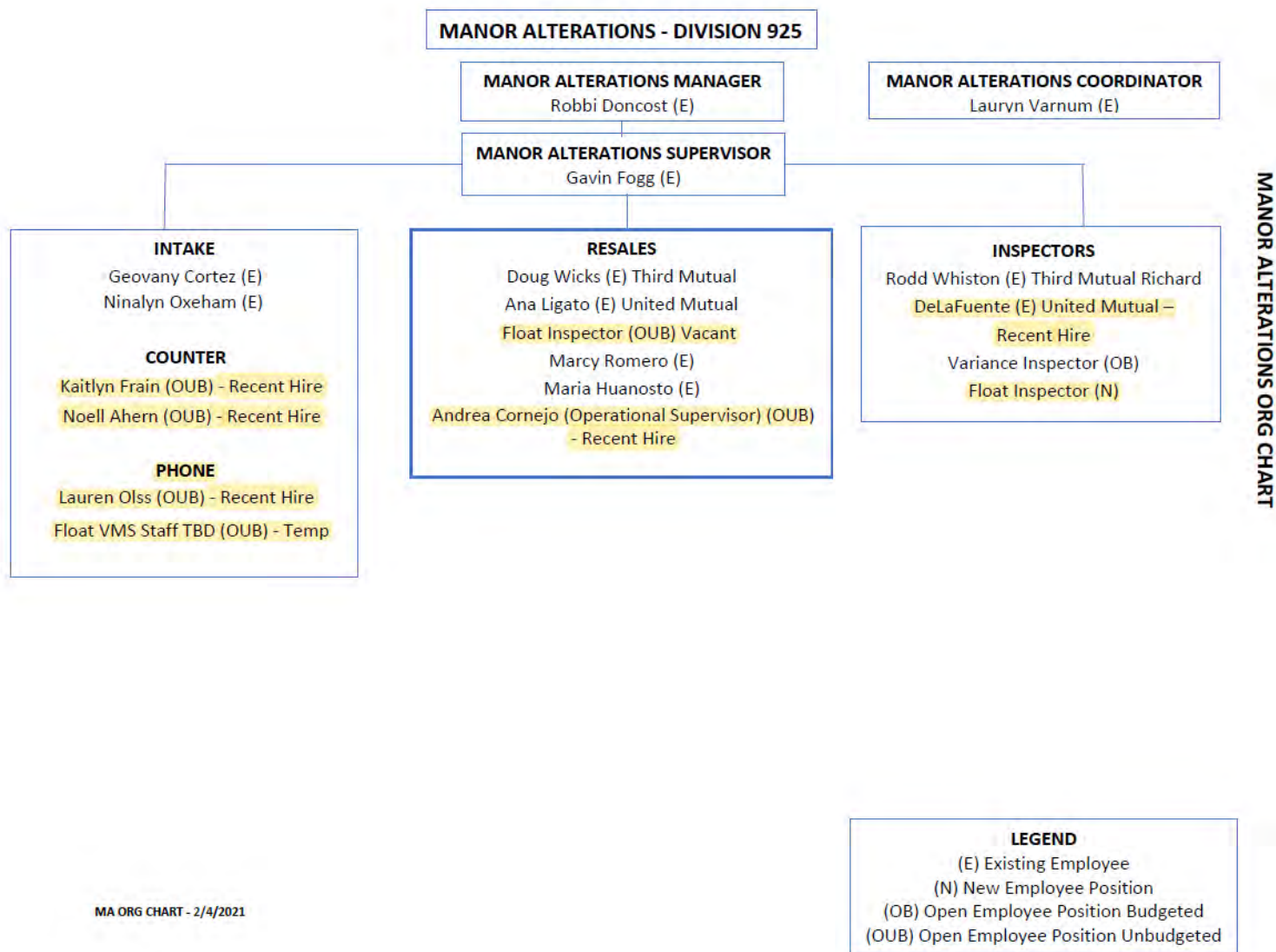


## Attachment One – Financial Analysis

925 ADDED STAFF FINANCIAL ANALYSIS					
DIVISION 925		January 15, 2020			
See Organizational Chart for listing of new positions and new staff added.					
STAFF ADDITIONS		Economical Impact			
<u>Counter Staff Added</u>		<u>Rate/Hr.</u>	<u>Yearly Pay</u>		
0	promotion-Sr. Op Specialist	2.2	\$ 4,576	1) Previously Appv'd position	
1	1 Counter Operational Specialist	19	\$ 39,520		
2	2 Counter Operational Specialist	19	\$ 39,520		
<u>Phone Staff Added</u>					
3	3 Phone Operational Specialist	19	\$ 39,520		
4	4 Phone Operational Specialist	19	\$ 39,520		
<u>Resales Staff Added</u>					
5	5 Inspector Float	28.85	\$ 60,000		
6	6 Operational Specialist	19	\$ 39,520		
<u>Inspectors Staff Added</u>					
7	7 Float Inspector (3rd & United)	28.85	\$ 60,000		
			<b>Total Salary Increase Per Org Chart</b>	<b>\$</b>	<b>(322,176)</b>
<u>Economical Resource Alternatives</u>					
<u>Mutual Consents</u>		Current Fees	MC Proposed Fee Increase		
MC Permit Fees Collected 2020		\$ 110,500	\$ 120,000.00	2) MC Permit Fees Calculated See Exhibit "A"	
<u>Resale Inspection &amp; Report Fees</u>		Current Fees	Proposed Fee Increase		
Third Resale Inspections		\$ 37,375	\$ 45,000.00	3) Resale Inspection & Report Fees Calculated See	
United Resale Inspections		\$ 48,750	\$ 45,000.00	Exhibit "A" for Fees	
		\$ 86,125	\$ 90,000		
			Proposed Fee Increase		
		Current Fees			
			4) Resale Inspection & Report Fees See Exhibit "A"		
<u>Variances</u>		24	24		
		VARs/YEAR	VARs Actual	Additional Fee Generated	
Variance Fee \$150/VAR.		\$ 3,600	\$ 7,944	\$ 4,344	5) 24 Variances per year average.
<u>Added Fines</u>					
MA Issued IN110 Stop Notice		Fine of \$500 X 17 events	\$ 8,500	6) 1.42 per month	
MA Issued N of Correction 9378		Fine of \$250 X 43 events	\$ 10,740	7) 3.58 per month	
			<b>Added Proceeds for Various Cost Revisions</b>	<b>\$</b>	<b>323,584</b>
			<b>Total Financial Impact</b>	<b>\$</b>	<b>1,408 per year</b>
			Added Income		
NOTES:					
1) This rate is noted as the increase from prior position to new position rate increase as previously approved.					
2) MC Permit Fees see Exhibit "A" for Current & Proposed Fees					
3) Resale Fees see Exhibit "A" for Current & Proposed Fees					
4) Resale Inspection & Report Fees See Exhibit "A"					
5) Increase of Variance fee proposed to cover acutual cost to owner					
6) MA Stop Notice Fee- Many are issued for illegal work or ACM P-5 Cleanup					
7) Correction Notice Issuance for work not conforming to Standards and Policy					
The current variance fee of \$150 doesn't come close to covering the site visits, staff reporting, and preparation					

EXHIBIT "A"				
MUTUAL CONSENT CURRENT FEES				
Mutual Consent Current fee based on Average of records searched in 2020				
MCs processed '2020	325 records for the AV yr.			
MC Fee Av 2020	\$ 340	for PA01 & PA02 Mutual Consent		
MC FEES COLLECTED 2020	\$ 110,500			
MUTUAL CONSENT PROPOSED FEE INCREASE				
United \$100 Fee Increase X 600 AV MC's/yr	\$ 60,000	Fee Increase only		
Third \$100 Fee Increase X 600 AV MC's/yr.	\$ 60,000	Fee Increase only		
MC PROPOSED FEE INCREASE	\$ 120,000	Proposed Fee Increase		
RESALE INSPECTION & REPORT FEES CURRENT & PROPOSED				
Current Fees 2020				
Third Report Cost Current : \$115	\$ 37,375	325 resales inspections		
United Report Cost Current: \$150	\$ 48,750	325 resales inspections		
	\$ 86,125	Current Fees		
Fee Increase				
Resale Inspections in 20211				
United \$100 Fee Increase X 450 Insp't	\$ 45,000.00	Fee Increase only		
Third \$100 Fee Increase X 450 Insp't	\$ 45,000.00	Fee Increase only		
	\$ 90,000	Proposed Fee Increase		
Projected an increase in Resale Inspections due to staff and no malware problems				
VARIANCE FEES ACTUAL				
Per 2021 Bill Rates Schedule				
	\$ 38.94			
		Hrs.	Total	
Inspection Site Visit & Gen. Data	\$ 38.94	1.5	\$ 58.41	
Manor Research Tickets/MC's/Violations	\$ 38.94	2.5	\$ 97.35	
Operations Specialist Report	\$ 38.94	1.5	\$ 58.41	
Operations Specialist Filing & Transmittal	\$ 38.94	1.5	\$ 58.41	
Misc. Reissue & Resale Coord. O.S.	\$ 38.94	1.5	\$ 58.41	
		8.50	\$ 330.99	
		Hrs	per report	
			Actual Cost	
	Actual Fee 24 X @330.99 =		\$ 7,943.76	
EXHIBIT "B"				
VARIANCE ASSEMBLY & REPORT PROCESSING FEE ALLOCATION				
Per 2021 Bill Rates Schedule				
	\$ 38.94	Hrs.	Total	
Rev of Variance Initial Req. & Discssions	\$ 38.94	0.5	\$ 19.47	
Initial Stellar & Policy Review	\$ 38.94	1	\$ 38.94	
Site Visit & Doc Assembly	\$ 38.94	4	\$ 155.76	
Report Assembly	\$ 38.94	7	\$ 272.58	
Added Plan Coordination/MC	\$ 38.94	2	\$ 77.88	
Supervisor Review & Comments	\$ 38.94	1.5	\$ 58.41	
Manager Review & Edits	\$ 38.94	1	\$ 38.94	
		17	\$ 661.98	
		Hrs	Per Variance	
			Actual Cost	

## Attachment Two - Organization Chart Division 925





## Attachment Three – Revised Fee Schedule

Rev. January 25, 2021 : Alteration Fee Schedule Proposed



Laguna Woods Village®

### Alteration Fee Schedule

#### Mutual Consent for alteration(s) fee schedule

For items not listed, please call the Alterations Department at 949-597-4818

[alterations@vmsinc.org](mailto:alterations@vmsinc.org)

Visit [www.lagunawoodsvillage.com](http://www.lagunawoodsvillage.com) for Mutual Standards and Standard Plans

All items require HOA Mutual Consent for manor alterations; city permit required as shown.

All construction, with a value of \$500 or greater, is subject to a refundable \$250 conformance deposit.

Unauthorized Alteration Fee	\$500
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\$50 Alteration Processing Fee	
Alteration Type	City Permit Required
Acoustic ceiling removal	Yes
Awnings (standard, less than 54")	No
Awnings (powered)	Yes
Air conditioner, central (replacement)	Yes*
Bath tub replacement	Yes
Block walls (less than 4 feet high)	No
Block walls (more than 4 feet high)	Yes
Planter wall	No
Dishwasher	Yes
Doors revisions (exterior)	No
Electrical	Yes
Exhaust fan	Yes
Fences and gates	No
Floor coverings (exterior)	No
Flooring (vinyl)	Yes
Gutters and downspouts	Yes
Metal drop shades	No
Modesty panels (balcony)	No
Patio slab revision	No
Patio wall revision	No
Plumbing (Minor)	No
Soft water system	Yes
Soft water system (connected to water heater)	Yes
Storage cabinets (carport)	No
Shades (roll-up)	No

\* Replacement A/C and Heat Pumps will not require City permit so long as the Amperage remains the same as current installed unit.

\* Resale Expedition Fee is \$1200 to provide 1st Inspection, issue report, and process a single Mutual Consent over the counter for like-for-like water heater, A/C unit switch-out, or Class I Mutual Consent issuance for a 45 Calendar Day expedite.

Stop Work Fee Schedule	
Violation of Unauthorized Work	Fee
1st Violation by Contractor	\$500
2nd Violation by Contractor	\$1200**

\*Each subsequent violation doubles prior Violation Fee

\*\*Notice of Asbestos Release is \$1500 + Clean Up and Testing Fees

Variance Processing Fee	\$331
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Inspection Fees Based on Value	
Alteration Type	City Permit Required
Air conditioner (through the wall)	Yes
Bathroom addition (split)	Yes
Central heating & air (new)	Yes
Covers (atrium, balcony, patio)	Yes
Replace or New	Yes
Doors (new)	Yes
Enclosures atrium/balcony/patio	Yes
French doors (new)	Yes
Garden room/solarium	Yes
Heat pumps (through the wall)	Yes
Man doors (new)	Yes
Plumbing (new or relocation)	Yes
Room addition	Yes
Shower to shower	Yes
Skylights	Yes
Sliding glass doors (new)	Yes
Sliding glass door (retrofit)	Yes
Solatubes	Yes
Solar panels	Yes
Tub to shower	Yes
Wall revisions	Yes
Washer and dryer	Yes
Water heater (relocation)	Yes
Windows (new construction)	Yes
Windows (retrofit)	Yes

Inspection Fee Schedule			
Valuation	Current Fee	Proposed Fee	% of Increase
Less than \$750	\$50	\$70	40%
\$750 to \$2,000	\$77	\$108	40%
\$2,001 to \$4,000	\$168	\$235	40%
\$4,001 to \$6,000	\$280	\$392	40%
\$6,001 to \$8,000	\$392	\$549	40%
\$8,001 to \$10,000	\$504	\$706	40%
Above \$10,000	\$700	\$980	40%

MA Issuance of IN110 Stop Notice Fee : \$500

MA Issuance of Notice of Correction Fee : \$250

# Mutual Consent Application

## Processing SOP

The below steps are a guide for how to track a Mutual Consent Application Form for both Demo and Construction projects by utilizing the status codes of the ticketing tracking system Stellar. The steps are for status updates only. All regular notes and attachments to tickets should be made, as per SOP for Mutual Consent processing.

Both Intake Staff and Inspectors are expected to update status of tickets as they process applications.

### **New application received**

MA receives a new application of a Demo or Construction Mutual Consent via e-mail:

1. **Intake Staff creates PA01/PA02 ticket in Stellar for the related Manor.**
  - i. NEW (Default status) – Application submitted and received by MA.
2. **Intake staff reviews application for completeness.**
  - i. PN – Pending – Application printed for Front Desk Review
  - ii. DOC – Documentation Process – Front Desk reviewing Application for Completeness
3. **Following Intake Staff Review** - respond to e-mail application with appropriate information to obtain more information or acknowledge receipt of completed application:
  - i. RV – Being Revised – Requested Info from Member/Applicant – Incomplete submission request for more supportive documents sent.
  - ii. PCP – Plan Check in Process – Application has passed Intake review and processed for Inspector Plan Check.
4. **Inspector Plan Check** – Inspector determines if the application can be approved at a technical level. Determines if any supplemental documents are needed and generates supplemental documents as needed.
  - i. POP – Pending Obtaining Payment – Application approved and placed in approved folder ready for Intake staff to call applicant and take payment prior to release.
  - ii. RQST – Requested Info from Member/Applicant Inspector has contacted applicant for additional technical documents e.g. elevation drawings, specs etc.
  - iii. OH – On Hold – Inspector Requires Neighbor Awareness Forms, Common Area Usage Agreements or City permit/air clearance for DEMO (Applies to PA01s only).
  - iv. DEN – Denied – Inspector is not able to approve e.g. None standard alterations.
5. **Intake Staff COLI Request/Payment/Release** – Intake Staff review application from Inspector 'Approved folder'. Take appropriate action dependent on if final documents are complete.
  - i. RV – Being Revised – Incomplete COLI documents.
  - ii. CLM – Called Member/Applicant – Left Message – Unsuccessful attempt to take payment.
  - iii. MC – Member Contacted/Work Pending – Payment has been taken and Application released. Instead of "Work Pending" consider "Permit Ready for Issuance" or ("PRI")
6. **City Permits/Request for Final Inspection received** – Intake staff receive finalized City permit or receives request for final inspection for non-city permit alterations.
  - i. FW – Final Walk – Application has been placed in Final Inspection request folder.
  - ii. CM – Completed – Approved Application has been sent to applicant, Final date entered into permit database and ticket can be closed.

Legend:			
Code	Stellar Description	Manor Alteration Meaning	Responsibility of
CLM	Contact Attempted/Left Message	Called Member/Applicant - Left Message	Applicant
CM	Completed	Completed	N/A
CN	Cancelled	Cancelled by Member/Staff – for Errors only. Member cancel is considered completed for staff due to the time spend working the ticket.	N/A
DEN	Denied	Denied	Applicant
DOC	Documentation Process	Front Desk Reviewing Application for Completeness	MA
FW	Final Walk	City Permits/Air Clearance provided/Request for Final Inspection	MA
MC	Member Contacted / Work Pending	Complete MC released	Applicant
NEW	New	Application Submitted and Received by MA	MA
OH	On Hold	On Hold for Neighbor Awareness Notices or Common Area Usage Agreement to be provided	Applicant
PCP	Plan Check in Process	Receiving Plan Check by Inspector	MA
PN	Pending	Application Printed for Front Desk Review	MA
POP	Pending Obtaining Payment	Payment Required for Submission	MA
RQST	Requested info from Member	Revisions to plans/scope of work have been requested by MA	Applicant
RV	Being Revised	Non technical documents requested by MA (e.g. COLI, Signatures)	Applicant