



## **OPEN SESSION**

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

**Thursday, March 18, 2021 – 9:30AM  
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. Join the Zoom meeting at <https://zoom.us/j/91432172027>
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 Minutes – Thursday February 18, 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.*

#### **Status of Mutual Consents:**

8. Current Inquiry Status – Processing Times

#### **Items for Discussion:**

9. Staff Report – Manor Alterations Staff Additions; Budget Status, Historical Context & Additional Staff Request (Attachment #1)
10. Ongoing Communication- (Attachment #2)
  - i. Village Breeze Article
  - ii. Contractor Newsletter
11. Permit & Variance Process Map – (Attachment #3)
  - i. Basic Process Map
  - ii. Manor Alterations SOP
  - iii. Quantity & Type of SOPs
  - iv. Clarification on Where in SOP Spreadsheets are Utilized
  - v. Clarification on Where Automation is Utilized
  - vi. Is There a Discrepancy Between Proposed SOP and Current Practice?
12. Website Updates
  - i. Permitless Alteration
  - ii. Application Tracking Portal



13. Asbestos Regulations Meeting (Attachment #4)
14. Asbestos Resolution Draft (Attachment #5)
15. 483-D Manor Update
16. KPI Update from Andre Torng

Items for Future Discussion:

- Standard Details Update – Cost Estimates

Concluding Business:

17. Committee Member Comments
18. Date of Next Meeting – April 15, 2021 at 9:30AM
19. Adjournment



**OPEN MEETING**

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

Thursday, February 18, 2021 - 9:30 AM  
Laguna Woods Village Community Center (Virtual GoToMeeting)  
24351 El Toro Road, Laguna Woods, CA 92637

**REPORT**

**COMMITTEE MEMBERS PRESENT:** Chair Brian Gilmore, Elsie Addington, Carl Randazzo, Neda Ardani,  
Reza Bastani, Andre Torng

**DIRECTORS PRESENT:**

**COMMITTEE MEMBERS ABSENT:** None

**ADVISORS PRESENT:** Walter Ridley, Mike Mehrair, Juanita Skillman

**STAFF PRESENT:** Ernesto Munoz, Gavin Fogg, Robbi Doncost, Richard DeLeFuentes, Lauryn Varnum,

**1. Call to Order**

Chair Gilmore called the meeting was called to order at 9:30am.

**2. Acknowledgement of Media**

None present.

**3. Approval of Agenda**

Director Randazzo moved to accept the agenda. Director Bastani seconded. The committee approved the agenda as presented.

**4. Approval of Meeting Report for Thursday January 21, 2021 & Tuesday February 2, 2021**

The committee approved the meeting reports as presented by acclamation.

**5. Chair's Remarks**

Chair Gilmore gave his remarks to keeping the ACSC meeting on topic and completed within the proposed 2-hour timeframe.

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



None.

## **7. Manor Alterations Division Update**

Staff Officer Doncost provided an update on the implementation of the newsletter correspondence, Permit-Less Alteration form provided via email for further review, website updates are in progress with Marketing Division, and the onboarding of new staff is having a great effect in the reduction of wait times in both phone call and email inquiries.

### **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.*

### **Status of Mutual Consents:**

## **8. Snapshot of Current & Past Permit Inquiries**

Mr. Doncost highlighted the Open and In Progress permits issued by Manor Alterations both current and previous years. Mr. Doncost discussed the decrease in backlogged inquiries due to increase in staff. Chair Gilmore and Director Randazzo inquired as to the classification, and Director Torng clarified the distinction between “open” and “outstanding”, and offered to assist in tracking and assimilation of data.

### **Variance Requests:**

#### **A. Variance Request – Ms. Patricia Gothard of 61-Q (Calle Cadiz, 6A) – Request to Retain Stair Lift on Common Area Stair Case**

Discussion ensued regarding the Variance Request. A member provided comments in opposition of the Variance Request, Staff Officer DeLaFuente explained the Conditions of Approval, including a dedicated electrical outlet required at the outside wall of the Manor.

A motion was passed to approve the Variance Request and recommend approval to the United Board with the condition the lift meets fire and building code.

#### **B. Variance Request – Mr. Andre Torng of 188-B (Avenida Majorca, 5) – Request to Complete a Loft Extension**

Discussion ensued regarding the Variance Request. Staff Officer DeLaFuente explained the conditions of approval. Advisor Ridley inquired as to the addition of electrical outlets, Director Torng agreed to the inclusion of outlets as necessary to meet code.

A motion was passed to approve the Variance Request and recommend approval to the United Board with the condition it is compliant with the electrical code regarding new outlets in living space.



### **Items for Discussion:**

#### **9. Asbestos Meeting – Proposed Date: February 26, 2021 at 2:00PM**

Mr. Doncost confirmed that AQMD had denied the request to present at the proposed meeting. He confirmed AQMD recommended interested parties visit their website, attend outreach programs, and review the FAQ section of their website.

Discussion ensued and Chair Gilmore read Rule 1403 and the Federal Register 40 CFR, part 61 and could not find the numbers cited on the MA forms. Chair Gilmore also cited the MA Form stating the ACM in an area of <100 sq ft, which seems to be in conflict with other information and a question was raised about greater than 100 sq ft? Staff Officer Ernesto Munoz recommended submitting all questions directly to the IHS consultant scheduled to present. A discussion ensued about where the 0.1% limit comes from. CALOSHA was cited by staff, which Chair Gilmore questioned after reading CalOSHA regulations which state 1%. Chair Gilmore requested MA to forward to the committee their citations stating the 0.1% limit.

Director Randazzo stated a lack of faith in the capability of the IHS consultant slated to speak. Chair Gilmore requested to receive a copy of the IHS consultant's professional resume. Staff agreed. Mr. Doncost recommended that the Asbestos Summit meeting be allowed to continue as schedule. Chair Gilmore and with the consent of the committee recommended to postpone the Asbestos Meeting until a later time with the request CEO Jeff Parker reach out to a member of the AQMD.

Staff Officer Gavin Fogg stated that the point count method was acceptable. Director Randazzo requested MA notify contractors of this policy.

#### **10. Permit-Less Proposal Implementation**

Mr. Doncost discussed the draft of the form, and encouraged feedback from all members of the ACSC. Chair Gilmore requested to have the form distributed to the ACSC members for further comment to receive response within 2 days.

Director Randazzo provided feedback and suggestions for revising the form, and questions regarding the website implementation.

Chair Gilmore inquired as to when the form would be available within the website. Mr. Doncost stated the email address had been created, and Manor Alterations would be meeting with the appropriate division to advance the website revisions and technical support changes. He suggested a realistic timeline would be approximately 2-3 weeks. The ACSC Members expressed concern with the timeline of initiation. A motion to extend the "effective date" was deferred until the ACSC deemed necessary.

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

Discussion delayed until next ACSC meeting.



## **12. KPI Report Generation**

Director Torng explained the process of documenting, measuring, and evaluating KPIs. Director Torng proposed the initiation of a software program to automate this process. Director Randazzo suggested delaying this process until Manor Alterations has addressed the backlog of inquiries. Director Torng offered to provide insight and assistance into the creation of this review process, which Mr. Doncost approved.

## **13. Budget & Staffing Report**

Discussion delayed until next ACSC meeting.

## **14. Procedures Alignment Plan**

Discussion delayed until next ACSC meeting.

### **Items for Future Agendas:**

Standard Details Update Cost Estimates

Ongoing Communication with 3<sup>rd</sup> Party Vendors and Community Members

Budget & Staffing Report

Procedures Alignment Plan

### **Concluding Business:**

## **15. Committee Member Comments:**

None.

## **16. Date of Next Meeting – March 18, 2021**

## **17. Adjournment at 11:33 AM.**

X \_\_\_\_\_

Brian Gilmore, Chair

Robbi Doncost, Staff Officer

Telephone: (949) 268-2281



## STAFF REPORT

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**DATE:** March 18, 2021  
**FOR:** United 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**

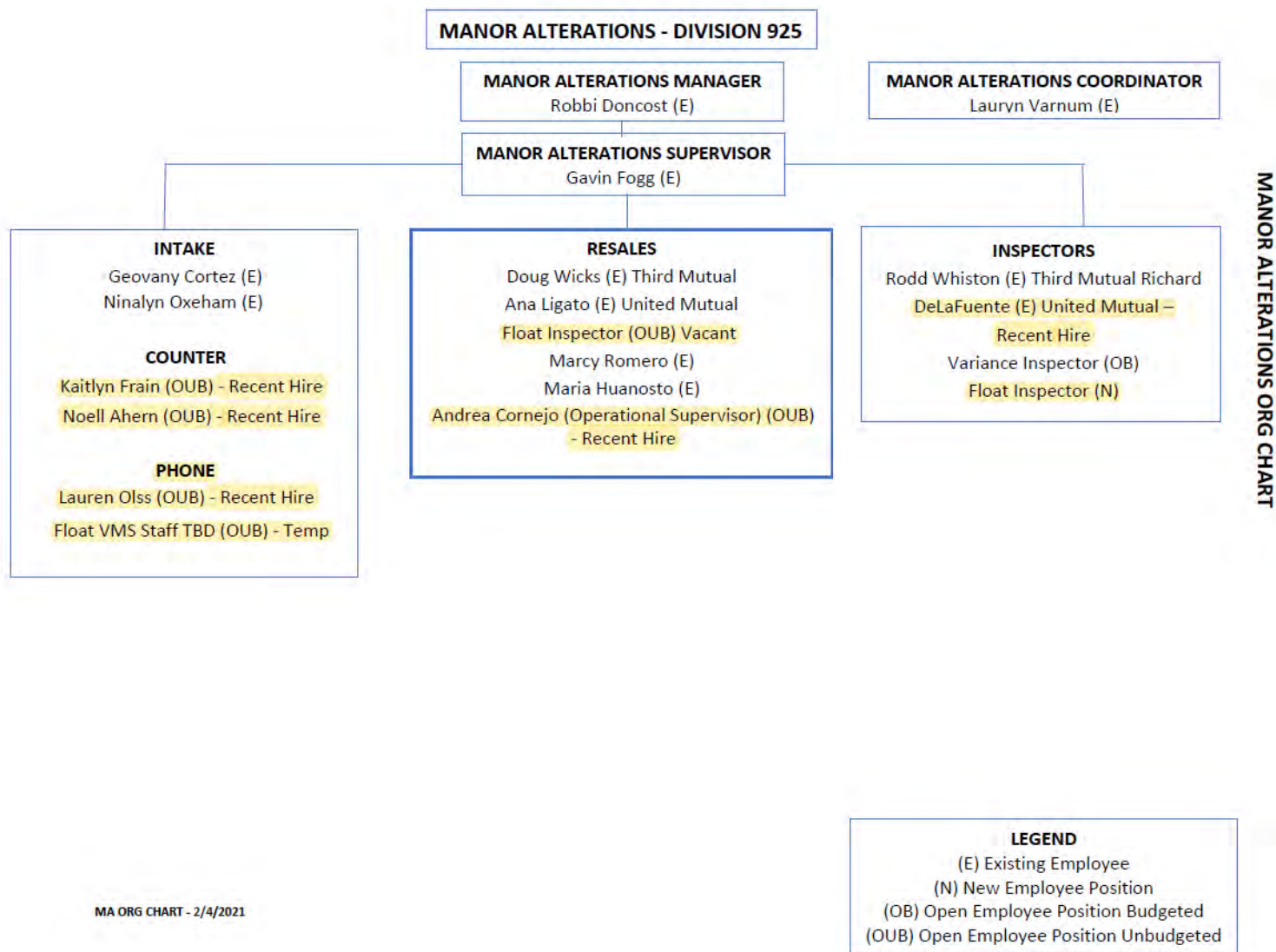
## Attachment One – Financial Analysis

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>\$ (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>\$ 323,584</b>	
			<b>Total Financial Impact</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 actual 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



## **United Sizes Up Permitless Alterations** **By Elsie Addington, Director**

Due to COVID-19, the malware attack and labor shortages, Manor Alterations (MA) staff is experiencing all-time highs in backlogged emails and phone calls. MA management and the Architectural Committee collaborated to develop a permitless alterations policy and resolution that will undergo a six-month trial from the date of implementation to eliminate resident wait times and give VMS needed time to catch up. The permitless process is website based and only requires the resident to fill out information and proceed with the replacement of like-for-like items. If successful, it could become permanent.

This plan requires **no Village permits** for “like-for-like,” or equivalent, replacements of certain manor components. These alterations must be performed without making new cuts into walls, disturbing asbestos or changing mutual electric or plumbing. Residents who choose to participate must sign a waiver accepting responsibility for damages caused by the resident or their contractor. Also, the resident will be responsible for any City of Laguna Woods permits that may be necessary, even though qualifying replacements will need **no permit from the mutual**.

To varying degrees, the plan applies to original and alteration manors.

With some qualifications, the plan includes such items as refrigerators, stoves, microwaves, dishwashers, kitchen countertops and sinks, as well as several bathroom components. All mutual components that are changed out will be returned to the mutual.

A dedicated email address will be established for program requests, and application instructions will be provided. During the process, residents are asked to submit “before” and “after” photos so that any replacements can be noted in the manor file.

Be sure to watch for more information in the “What’s Up in the Village” every-Friday eblasts and on the website. A great deal of work went into making this trial process as easy as possible, and hopefully will become a faster, simpler procedure than, say, reading this article!



## **Manor Alterations News for Contractors**

### **Welcome to Our Biweekly Newsletter**

To help keep contractors up to speed regarding recent rule changes, Laguna Woods Village permit request status and any other news pertinent to contractors so they may start and complete their work within prescribed rules and processes, the Laguna Woods Village Manor Alterations Division will issue a news bulletin to all contractors every two weeks.

Contractors who wish to receive this information must provide their email address to Lauryn Varnum at [lauryl.varnum@vmsinc.org](mailto:lauryl.varnum@vmsinc.org). Manor Alterations will send this newsletter to all contractors who have requested a permit as long as your email address is on file. Other contractors who wish to receive this information must submit a request to [lauryl.varnum@vmsinc.org](mailto:lauryl.varnum@vmsinc.org) and state the reason for the request.

This first news bulletin addresses the following topics: overall news, changes in rules that are in effect or are expected, changes in insurance requirements that are expected, new team members and backlog status, and it will include a spreadsheet denoting the status of permits submitted for approval.

Please note this provides permit status only. All contractors must consult with the City of Laguna Woods in regard to permits.

This news bulletin is a work in progress. If we have omitted information you believe should be included, please send an email to [alterations@vmsinc.org](mailto:alterations@vmsinc.org). Please note: This email address is for correspondence regarding news bulletins only and will be reviewed only periodically. Other unrelated correspondence will not receive the quick reply it may warrant.

### **Changes to Rules in Effect/Expected Changes**

At this time, we are implementing a permitless alterations policy for United Mutual members. This initiative provides United members the opportunity to make minor alterations within their manor/unit without the need for a permit. Please visit [\[website link here\]](#) to view the form.

### **Six-Month Variance Moratorium**

To allow sufficient time for Manor Alterations to train new staff and better manage the current shareholder permit applications currently submitted, the United Board of Directors has approved a six-month temporary hold on variances, effective April 9, 2021.

## **Insurance Requirements**

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

## **Track Current Response Times**

Please see below for expected turnaround for current estimated correspondence reply time and permit processing.

- Phone call: One day
- Email: Five to seven days
- Completed permit: Five to 14 days

## **Permit Status**

If your permit is not shown on the spreadsheet provided at the link below, it is not yet in the queue or it is currently being processed. Please contact us if you believe your permit should be on this list at this time.

Please [click here](#) to view permit status, which is updated every two weeks.

## **New Team Members**

- **Operations Specialists:** Noell Ahern, Andrea Cornejo, Kaitlyn Frain and Lauren Olss
- **Third Mutual Inspector:** Richard DeLaFuente, AIA

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# 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

**Mojdeh (May) Khalighi, MSPH, CIH, CPEA, CAC**



May Khalighi has over 33 years of comprehensive technical experience in the environmental health and safety field in both the public and private sectors.

Her specific areas of expertise include chemical exposure assessments, indoor air quality, hazard communication, health and safety training, and all related issues to comprehensive practice of Industrial Hygiene. Her experience includes designing, directing, and conducting thousands of industrial hygiene investigations and exposure assessments including indoor air quality, mold, asbestos and lead related issues, among other complicated hazardous material site assessments.

Ms. Khalighi conducts training lectures on regular basis with topics varying from health and safety management and liability issues, to general indoor air quality, mold, asbestos, silica, lead, etc.

She has been designated as an expert numerous times in the areas of industrial hygiene and indoor air quality, and has successfully testified in both trials and arbitrations.

**EDUCATION**

- MS in Public Health, Major in Industrial Hygiene, University of Utah-Rocky Mountain Center for Occupational Safety & Health (NIOSH Accredited)-Spring 1991
- BS in Mechanical Engineering: IUST 1980

**PROFESSIONAL CERTIFICATIONS AND ACCREDITATIONS:**

- Certified Industrial Hygienist (CIH)-Cert # CP 7082-May 1996
- Certified Professional Environmental Auditor in Health & Safety (CPEA)- Cert # 667
- CAL-OSHA Certified Asbestos Consultant (CAC)- Cert # 02-3098
- California DHS Certified Lead Inspector/Assessor and Project Monitor- Cert # 8621
- Over 1000 Continuing Education Units received for attending courses related to broad range of Industrial Hygiene, Indoor Air Quality, Asbestos, Lead based paint, and Microbial Contamination Issues

## **PROFESSIONAL EXPERIENCE**

### **President, IHS Environmental, Inc.**

*November 2001-Present*

- Established IHS Environmental, Inc., an environmental consultancy and training firm serving clients in California and the Western U.S.
- Perform expert witness evaluations and testimonies in litigation support related to industrial hygiene/chemical exposures, asbestos, mold, indoor air quality and other environmental and industrial hygiene subjects.
- Direct and conduct comprehensive industrial hygiene, safety and environmental inspections, assessments and audits. Provide clients with control measures, solutions to the problems and prevention programs.
- Direct, develop and conduct training courses and seminars on OSHA required topics and other occupational and environmental related subjects.

### **Instructor- UCLA-NIOSH Resource Center**

*September 2007 to 2012*

- Course Instructor: CIH Exam Preparation Courses at the UCLA-NIOSH Educational Resource Center

### **Director of Industrial Hygiene and Training MED TOX Inc.**

*January 2000-November 2001*

- Directed and conducted comprehensive industrial hygiene, safety and environmental assessments and audits. Provided clients with control measures, solutions to the problems and prevention programs.
- Directed, developed and conducted training for Lab Safety, Asbestos, Hazardous Materials, Injury/Illness Prevention, HAZWOPER, Confined Space Entry, Emergency Preparedness, PPE/Respiratory Protection, Construction Safety, etc.

### **Risk Management Consultant State of Utah**

*September 1991- July 1999*

- Developed and implemented industrial hygiene, safety and environmental programs, audits and training for state agencies, universities, and school districts.
- Conducted statewide accident investigations, facility inspections and audits.
- Conducted work place evaluations and modifications as part of state loss prevention and workers compensation program.

### **Instructor, University of Utah (Part time)**

*March 1997-September 1999*

- Course Instructor: CIH Exam Preparation Courses at the University Of Utah-Rocky Mountain Center for Occupational & Environmental Health (RMCOEH)

### **Industrial Hygienist, IHI Environmental**

*April 1989- August 1991*

- Performed comprehensive industrial hygiene and safety assessments and inspections for identification, exposure evaluation and control of work place hazards. Prepared technical reports and provided training to clients.



## **LEADERSHIP POSITIONS AND AFFILIATIONS**

- Past President & Board Director, Orange County Section American Industrial Hygiene Association (OCAIHA)
- Past President & Treasurer, Utah Section American Industrial Hygiene Association (UTAIHA)
- Member: ABIH (American Board of Industrial Hygiene), AIHA (American Industrial Hygiene Association), BEAC (Board of Environmental Health & Safety Auditor Certification)

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## **RESOLUTION 01-21-XX**

### **Asbestos Construction Material Resolution**

Resolution – Asbestos Containing Materials (Contained in walls and in ceilings without Popcorn texture having been applied or previously abated)

**Whereas**, the United mutual Resolution 01-12-134 defines types of materials that could contain asbestos, referred to as Asbestos Containing Materials (ACM)

**Whereas**, the United Mutual Resolution 01-12-134 defines member/residents responsibilities and liabilities regarding ACM materials.

**Whereas**, many members do not know how to navigate the myriad of rules, written and unwritten, regarding ACM.

The following is to provide further clarity without increasing burdens on the members nor risk to the Mutual or VMS employees.

#### **Definitions:**

Demolition: per AQMD 1403 and EPA 40CFR61 demolition is the removal, relocating, or changing a load-supporting structural member.

Renovation: Per AQMD 1403 and EPA 40CFR61 renovation is “The altering of a facility or the removing or stripping of one or more facility components in any way, including, but not limited to, the stripping or removal of Asbestos Containing Materials from facility components, retrofitting for fire protection, and the installation or removal of heating, ventilation, air conditioning (HVAC) systems”

Asbestos Containing Material (ACM) per CalOSHA is construction material containing more than 0.1% and more than 100 sq ft

**It is Resolved:**

The scope of this resolution is alteration.

Point Count Method is an acceptable method to refine the percent measurement of asbestos contained in a sample. Most of the asbestos contained either in the wall or the paper or the mud that was used on the wall has been found to contain 1% or less ACM. The point count method that is used by testing laboratories can be used as calculated such that the ACM will meet the CalOSHA requirement stated above. If via the point count method it is found to meet the CalOSHA requirement, then removal and disposal of the material can be considered to follow the guidelines for normal construction material that contains no ACM.

Manor alterations do not fall under Class I through IV Asbestos Activities as defined by CA Title 8, section 1529. Nor do these activities fall under the definition of disturbance as defined in CA Title 8, Section 1529. These alterations including but not limited to cabinet replacement, bookcases, picture hangers, smoke detectors, and other activities where a fastener is removed and re-inserted and other household components attached to the wall with fasteners. Therefore, removal of the foregoing items does not fall under the rules for ACM. When the foregoing items are removed from walls that contain ACM, reasonable caution must be taken to ensure that the wall containing the ACM is not disturbed such that the ACM is permitted to be released. This is incumbent on the contractor to make this happen and protect the contractor's people from the affects of friable ACM that is in excess of the CalOSHA requirement.

Contractors working on United Mutual are required to sign a copy of this resolution in acknowledgement they have been informed, are aware and are practicing per the governmental regulations.

Effective May 13, 2021