

## **BLUE FOLDER ITEM**

*Blue folder items are additional back up material to administrative reports and/or public comments received after the printing and distribution of the agenda packet for receive and file.*

### **PRESERVATION COMMISSION MEETING May 4, 2022**

#### **L.2. LOS ANGELES COUNTY ASSESSOR MILLS ACT PRESENTATION**

- The Certified Local Government (CLG) Program Annual Report
- Mills Act Assessor Examples

# The Certified Local Government (CLG) Program Annual Report

# Certified Local Government Program -- 2020-2021 Annual Report

(Reporting period is from October 1, 2020 through September 30, 2021)

**INSTRUCTIONS:** This is a Word form with expanding text fields and check boxes. It will probably open as Read-Only. Save it to your computer before you begin entering data. This form can be saved and reopened.

Because this is a WORD form, it will behave generally like a regular Word document except that the font, size, and color are set by the text field.

- Start typing where indicated to provide the requested information.
- Click on the check box to mark either yes or no.
- To enter more than one item in a particular text box, just insert an extra line (Enter) between the items.

Save completed form and email as an attachment to [info.calshpo@parks.ca.gov](mailto:info.calshpo@parks.ca.gov). You can also convert it to a PDF and send as an email attachment. Use the Acrobat tab in WORD and select Create and Attach to Email. You can then attach the required documents to that email. If the attachments are too large (greater than 10mb total), you will need to send them in a second or third email.

## Name of CLG

City of Redondo Beach

**Report Prepared by:** Stacey Kinsella, Associate Planner

**Date of commission/board review:** Pending

## MINIMUM REQUIREMENTS FOR CERTIFICATION

### I. Enforce Appropriate State or Local Legislation for the Designation and Protection of Historic Properties.

#### A. Preservation Laws

1. What amendments or revisions, if any, are you considering to the certified ordinance? Please forward drafts or proposals.

**REMINDER:** Pursuant to the CLG Agreement, OHP must have the opportunity to review and comment on ordinance changes prior to adoption. Changes that do not meet the CLG requirements could affect certification status.

**We are not considering any amendments at this time.**

2. Provide an electronic link to your ordinance or appropriate section(s) of the municipal/zoning code.

[https://library.gcode.us/lib/redondo\\_beach\\_ca/pub/municipal\\_code/item/title\\_10-chapter\\_4](https://library.gcode.us/lib/redondo_beach_ca/pub/municipal_code/item/title_10-chapter_4)

#### B. New Local Landmark Designations (Comprehensive list of properties/districts designated during the reporting.

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1. During the reporting period, October 1, 2020 – September 30, 2021, what properties/districts have been locally designated?

| Property Name/Address | Date Designated | If a district, number of contributors | Date Recorded by County Recorder |
|-----------------------|-----------------|---------------------------------------|----------------------------------|
| 308 N Catalina Avenue | March 3, 2021   | N/A                                   | 8/26/2021                        |
| 523 S Catalina Avenue | May 5, 2021     | N/A                                   | 8/26/2021                        |

**REMINDER:** Pursuant to California Government Code § 27288.2, “the county recorder shall record a certified resolution establishing an historical resources designation issued by the State Historical Resources Commission or a local agency, or unit thereof.”

2. What properties/districts have been de-designated this past year? For districts, include the total number of resource contributors?

| Property Name/Address | Date Removed | Reason |
|-----------------------|--------------|--------|
| None                  | N/A          | N/A    |

## C. Historic Preservation Element/Plan

1. Do you address historic preservation in your general plan? ☒ No  
☐ Yes, in a separate historic preservation element. ☐ Yes, it is included in another element.

Provide an electronic link to the historic preservation section(s) of the General Plan or to the separate historic preservation element. [Type here.](#)

## D. Review Responsibilities

1. Who takes responsibility for design review or Certificates of Appropriateness?

☐ All projects subject to design review go the commission.

☒ Some projects are reviewed at the staff level without commission review. What is the threshold between staff-only review and full-commission review? **Minor alterations such as changes to an opening are reviewed with our appointed**

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Minor Alterations Subcommittee comprised of two Preservation Commission members. Projects that involve major alterations such as additional square footage or changes to character-defining or street-facing features are reviewed with the Preservation Commission. Staff reviews ongoing maintenance.

## 2. California Environmental Quality Act

- What is the role of historic preservation staff and commission in *providing input* to CEQA documents prepared for or by the local government? Staff is responsible for preparing and presenting CEQA documents. The Preservation Commission provides input regarding those documents during the public hearing process.

What is the role of the staff and commission in *reviewing* CEQA documents for projects that are proposed within the jurisdiction of the local government? The Preservation Commission makes findings to adopt a CEQA determination, most commonly for a categorical exemption.

## 3. Section 106 of the National Historic Preservation Act

- What is the role of the staff and commission in *providing input* to Section 106 documents prepared for or by; the local government? Staff reviews Section 106 documents and determines the level of significance, if any, of the proposed work.
- What is the role of the staff and commission in *reviewing* Section 106 documents for projects that are proposed within the jurisdiction of the local government? Work that may have impacts, per Staff' review, would be forwarded to the Preservation Commission for review and determination.

## II. Establish an Adequate and Qualified Historic Preservation Review Commission by State or Local Legislation.

### A. Commission Membership

| Name          | Professional Discipline             | Date Appointed | Date Term Ends | Email Address  |
|---------------|-------------------------------------|----------------|----------------|--|
| David Jackson | Insurance Broker/Historical Society | 10/1/2018      | 9/30/2022      | <a href="mailto:jacksondavidw@aol.com">jacksondavidw@aol.com</a>   |
| Jeff Matsuno  | Teacher/Artist                      | 10/1/2021      | 9/30/2025      | <a href="mailto:jeff.matsuno@yahoo.com">jeff.matsuno@yahoo.com</a> |

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|                   |                                      |            |            |  |
|-------------------|--------------------------------------|------------|------------|--|
| Edward Caldwell   | Attorney                             | 10/1/2019  | 9/30/2023  | <a href="mailto:edwardc@westbasin.org">edwardc@westbasin.org</a>               |
| Michele McNearney | Real Estate                          | 10/1/2019  | 9/30/2023  | <a href="mailto:mickeymcnearney@yahoo.com">mickeymcnearney@yahoo.com</a>       |
| Peter Aziz        | Urban Planning/Public Administration | 12/1/2020  | 9/30/2024  | <a href="mailto:aziz.peter.elhamey@gmail.com">aziz.peter.elhamey@gmail.com</a> |
| Jamil Gittens     | Attorney                             | 12/1/2020  | 9/30/2021  | <a href="mailto:jamil.gittens@gmail.com">jamil.gittens@gmail.com</a>           |
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| Type here.        | Type here.                           | Type here. | Type here. | Type here.   |
| Type here.        | Type here.                           | Type here. | Type here. | Type here.   |

Attach resumes and Statement of Qualifications forms for all members.

1. If you do not have two qualified professionals on your commission, explain why the professional qualifications not been met and how professional expertise is otherwise being provided. **David Jackson is a long-time board member of the Redondo Beach Historical Society and is actively involved in their events and activities. He is well-versed in the local historic properties. Jeff Matsuno is an artist and teacher with a strong understanding of historic architecture. Jeff also lives in a historic residence near the original townsite.**
2. If all positions are not currently filled, why is there a vacancy, and when will the position will be filled? **There was one vacancy left by past Commissioner Sharon Ritums. She stopped attending meetings and stopped responding to staff correspondence. We attempted to appoint another member who ultimately decided not to serve on this commission.**

### B. Staff to the Commission/CLG staff

1. Is the staff to your commission the same as your CLG coordinator? ☒ Yes ☐ No If not, who serves as staff? [Click or tap here to enter text.](#)
2. If the position(s) is not currently filled, why is there a vacancy? Type here.

| Name/Title                 | Discipline   | Dept. Affiliation     | Email Address  |
|----------------------------|--------------|-----------------------|--|
| Stacey Kinsella, Associate | City Planner | Community Development | <a href="mailto:Stacey.kinsella@redondo.org">Stacey.kinsella@redondo.org</a> |

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|                        |              |                       |  |
|------------------------|--------------|-----------------------|--|
| Antonio Gardea, Senior | City Planner | Community Development | <a href="mailto:Antonio.gardea@redondo.org">Antonio.gardea@redondo.org</a> |
|------------------------|--------------|-----------------------|--|

Attach resumes and Statement of Qualifications forms for staff.

## C. Attendance Record

Please complete attendance chart for each commissioner and staff member. Commissions are required to meet four times a year, at a minimum. If you haven't met at least four times, explain why not.

The Preservation Commission did not meet in the Fall of 2020 due to COVID. By early 2021, we were given access and training for Zoom public meetings (whole new online agenda system), which is how we hosted the March and May public hearings. We did host one Minor Alterations Subcommittee meeting in November 2020, which only included the two appointed members plus staff. After May, many of our applicants were hesitant to commit to projects and several were placed on hold by the owners. We experienced this for all of our Planning projects, not just the Preservation items. Uncertainty about the economy during COVID halted a variety of projects.

| Commissioner/Staff | Oct                      | Nov                                 | Dec                      | Jan                      | Feb                      | Mar                                 | Apr                      | May                                 | Jun                      | Jul                      | Aug                      | Sep                      |
|--------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| David Jackson      | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Jeff Matsuno       | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edward Caldwell    | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Michele McNearney  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Peter Aziz         | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Jamil Gittens      | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Stacey Kinsella    | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Antonio Gardea     | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Type here.         | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Type here.         | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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### D. Training Received

Indicate what training each commissioner and staff member has received. Remember it is a CLG requirement is that all commissioners and staff to the commission attend at least one training program relevant to your commission each year. It is up to the CLG to determine the relevancy of the training.

| Commissioner/Staff Name           | Training Title & Description (including method presentation, e.g., webinar, workshop) | Duration of Training | Training Provider          | Date            |
|-----------------------------------|---|----------------------|----------------------------|-----------------|
| Stacey Kinsella                   | Palm Springs Modernism  | 1 hour               | CA Preservation Foundation | 2/9/2021        |
| Antonio Gardea<br>Stacey Kinsella | Ghostlore vs. Fakelore  | 1 hour               | CA Preservation Foundation | 3/11/2021       |
| Stacey Kinsella                   | Prince & Paisley Park   | 1 hour               | CA Preservation Foundation | 4/13/2021       |
| Antonio Gardea                    | Preservation Online Conference  | 1 Day                | CA Preservation Foundation | 6/10/2021       |
| Stacey Kinsella                   | Preservation Online Conference  | 3 days               | CA Preservation Foundation | 6/8 - 6/10/2021 |
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| Type here.                        | Type here.  | Type here.           | Type here.                 | Type here.      |
| Type here.                        | Type here.  | Type here.           | Type here.                 | Type here.      |

### III. Maintain a System for the Survey and Inventory of Properties that Furthers the Purposes of the National Historic Preservation Act

#### A. Historical Contexts: initiated, researched, or developed in the reporting year (excluding those funded by OHP)

**NOTE:** California CLG procedures require CLGs to submit survey results, including historic contexts, to OHP. (If you have not done so, submit an electronic copy or link if available online with this report.)

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| Context Name               | Description                        | How it is Being Used    | Date Submitted to OHP            |
|----------------------------|------------------------------------|-------------------------|----------------------------------|
| Historic Context Statement | Created in 1995, remains unchanged | Ongoing reference guide | Click or tap here to enter text. |

## B. New Surveys or Survey Updates (excluding those funded by OHP)

**NOTE:** The evaluation of a single property is not a survey. Also, material changes to a property that is included in a survey, is not a change to the survey and should not be reported here.

| Survey Area                  | Context Based-yes/no | Level: Reconnaissance or Intensive | Acreage    | # of Properties Surveyed | Date Completed | Date Submitted to OHP |
|------------------------------|----------------------|------------------------------------|------------|--------------------------|----------------|-----------------------|
| No updated surveys completed | Type here.           | Type here.                         | Type here. | Type here.               | Type here.     | Type here.            |

How are you using the survey data? Type here.

## IV. Provide for Adequate Public Participation in the Local Historic Preservation Program

### A. Public Education

What public outreach, training, or publications programs has the CLG undertaken? How were the commissioners and staff involved? Please provide an electronic link to all publications or other products not previously provided to OHP.

| Item or Event               | Description   | Date    |
|-----------------------------|---|---------|
| Cable Television Commercial | A television commercial advertising the City's Preservation Program broadcast on local cable network. | Ongoing |

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| Item or Event   | Description   | Date |
|---|---|------|
| Book – Photographic Collection of Historic Landmark Properties  | This book contains photos and descriptions of landmark sites within the City. Copies of 2009 edition are available at City Hall and the public library.   |      |
| City of Redondo Beach Historic Preservation video and documents | A video is available at the City's main library which describes the benefits of the local historic preservation program. All City preservation documents are filed at the main library and available to the public. |      |
| Redondo Beach Historical Society Events                         | The Redondo Beach Historical Society holds several events each year at the historic Morrell House. They also host an annual historic homes tour that is very popular.   |      |

## **ADDITIONAL INFORMATION FOR NATIONAL PARK SERVICE ANNUAL PRODUCTS REPORTS FOR CLGS**

### **NOTE: OHP will forward this information to NPS on your behalf. CLG Inventory Program**

During the reporting period (October 1, 2020-September 30, 2021) how many historic properties did your local government **add** to the CLG inventory? This is the total number of historic properties and contributors to districts (or your best estimate of the number) added to your inventory **from all programs**, local, state, and Federal, during the reporting year. These might include National Register, California Register, California Historic Landmarks, locally funded surveys, CLG surveys, and local designations.

| Program area | Number of Properties added |
|--------------|----------------------------|
| Citywide     | Two locally designated     |

### **A. Local Register (i.e., Local Landmarks and Historic Districts) Program**

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1. During the reporting period (October 1, 2020-September 30, 2021) did you have a local register program to create local landmarks and/or local districts (or a similar list of designations) created by local law? ☒ Yes ☐ No
2. If the answer is yes, then how many properties have been added to your register or designated from October 1, 2020 to September 30, 2021? **We added two new locally designated historic landmarks**

### C. Local Tax Incentives Program

1. During the reporting period (October 1, 2020-September 30, 2021) did you have a Local Tax Incentives Program, such as the Mills Act? ☒ Yes ☐ No
2. If the answer is yes, how many properties have been added to this program from October 1, 2020 to September 30, 2021? **The two designated properties were added to the Mills Act program**

| Name of Program | Number of Properties Added During 2020-2021 | Total Number of Properties Benefiting From Program |
|-----------------|---|--|
| Mills Act       | Two   | 107  |

### D. Local "bricks and mortar" grants/loan program

1. During the reporting period (October 1, 2020-September 30, 2021) did you have a local government historic preservation grant and/or loan program for rehabilitating/restoring historic properties? ☐ Yes ☒ No
2. If the answer is yes, then how many properties have been assisted under the program(s) from October 1, 2020 to September 30, 2021? **Type here.**

| Name of Program | Number of Properties that have Benefited |
|-----------------|--|
| Type here.      | Type here.                               |

### E. Design Review/Local Regulatory Program

1. During the reporting period (October 1, 2020-September 30, 2021) did your local government have a historic preservation regulatory law(s) (e.g., an ordinance) authorizing Commission and/or staff review of local government projects or impacts on historic properties? ☒ Yes ☐ No

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2. If the answer is yes, how many historic properties did your local government review for compliance with your local government's historic preservation regulatory law(s) from October 1, 2020 to September 30, 2021? **Staff assessed 22 properties overall, some of which went to the Preservation Commission for Certificate of Appropriateness and/or Landmark designation.**

### F. Local Property Acquisition Program

1. During the reporting period (October 1, 2020--September 30, 2021) did you have a local program to acquire (or help to acquire) historic properties in whole or in part through purchase, donation, or other means? ☐ Yes ☒ No
2. If the answer is yes, then how many properties have been assisted under the program(s) from October 1, 2020 to September 30, 2021 *Type here.*

| Name of Program   | Number of Properties that have Benefited |
|-------------------|--|
| <i>Type here.</i> | <i>Type here.</i>                        |

### **IN ADDITION TO THE MINIMUM CLG REQUIREMENTS, OHP IS INTERESTED IN YOUR FEEDBACK ABOUT THE RECENT CAMP TRAINING**

- Did anyone from your local government participate in the free CAMP training opportunities in Fall 2021? **No**
- If yes, which training session(s) did you find the most informative and useful?
- Whether or not you were able to take advantage of any of the CAMP trainings in 2021, would you like to see OHP to provide free additional CAMPs in the future? **We would like to know more about it and potentially participate.**

### **XII Attachments (electronic)**

- ☒ Resumes and Statement of Qualifications forms for **all** commission members/alternatives and staff
- ☒ Minutes from commission meetings

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- ☐ Drafts of proposed changes to the ordinance
- ☐ Drafts of proposed changes to the General Plan
- ☐ Public outreach publications

Email to: [info.calshpo@parks.ca.gov](mailto:info.calshpo@parks.ca.gov)

# Mills Act Assessor Examples

| TRENDED BASE YEAR VALUE (UNRESTRICTED)   |      | 726 SF Addition                   |
|--|------|-----------------------------------|
| Appraiser  | Date | 5/23/2020                         |
| Unrestricted Base Year Value   |      | \$1,034,068                       |
| SALES DATA - MARKET VALUE  |      |                                   |
| Subject Indicated Market Value:  |      | \$1,250,000                       |
| CAPITALIZED VALUE CALCULATION (Mills Act Value)  |      |                                   |
| Total Capitalized Property Value   |      | \$403,000                         |
| Remarks:   |      | TRENDED NCC 5/23/2012 = \$113,468 |
| Blended Mills Act & Base Year Value  |      | \$516,468                         |
| When valuing enforceably restricted historical property,<br>R&T Code Section 439.2 mandates that the final valuation be the lesser of the following three: |      |                                   |
| Unrestricted Base Year Value   |      | \$1,034,068                       |
| Unrestricted Market Value  |      | \$1,250,000                       |
| Capitalized Value/Blended Value  |      | \$516,468                         |
| <b>FINAL VALUE</b>   |      | <b>\$516,468</b>                  |

| TRENDING BASE YEAR VALUE (UNRESTRICTED)  |      | 1,102 SF Addition & 2,858 SF 2nd SFR |
|--|------|--------------------------------------|
| Appraiser  | Date | 5/23/2020                            |
| Unrestricted Base Year Value   |      | \$1,118,939                          |
| SALES DATA - MARKET VALUE  |      |                                      |
| Subject Indicated Market Value:  |      | \$2,200,000                          |
| CAPITALIZED VALUE CALCULATION (Mills Act Value)  |      |                                      |
| Total Capitalized Property Value   |      | \$445,000                            |
| Remarks:   |      | SEE BLENDED VAL CALC A               |
| Blended Mills Act & Base Year Value  |      | \$1,017,271                          |
| When valuing enforceably restricted historical property,<br>R&T Code Section 439.2 mandates that the final valuation be the lesser of the following three: |      |                                      |
| Unrestricted Base Year Value   |      | \$1,118,939                          |
| Unrestricted Market Value  |      | \$2,200,000                          |
| Capitalized Value/Blended Value  |      | \$1,017,271                          |
| <b>FINAL VALUE</b>   |      | <b>\$1,017,271</b>                   |

|             |                  |  |                  |                  |                |
|-------------|------------------|--|------------------|------------------|----------------|
| <b>2020</b> | <b>Mills Act</b> | This is the Mills Act for 1930 1016sf SFR    | 445,000          | 410,000          | 35,000         |
|             |                  | Subtract: 50% x 410,000 Mills Act Land       |                  | <u>(205,000)</u> |                |
|             |                  |  |                  | 205,000          |                |
|             |                  | Add: 50% x 582,695 Prop 13 Non Protected     |                  | <u>291,348</u>   |                |
|             |                  | Add: Trended value for 2nd Sty Add + New SFR |                  |                  | <u>485,923</u> |
|             |                  | <b>TOTAL</b>                                 | <b>1,017,271</b> | <b>496,348</b>   | <b>520,923</b> |

| TRENDING BASE YEAR VALUE (UNRESTRICTED)  |                                 | Add 280sf Gst Qtr (\$19200) (75% P.I.T.) |             |
|--|---------------------------------|--|-------------|
| Appraiser  | Date                            |  | 5/23/2020   |
| Unrestricted Base Year Value   |                                 |  | \$1,335,880 |
| SALES DATA - MARKET VALUE  |                                 |  |             |
| Subject Indicated Market Value:  |                                 |  | \$1,400,000 |
| CAPITALIZED VALUE CALCULATION (Mills Act Value)  |                                 |  |             |
| Total Capitalized Property Value   |                                 |  | \$548,000   |
| Remarks:   | Value of Non-Mills Act Property |  | \$55,452    |
| Blended Mills Act & Base Year Value  |                                 |  | \$603,452   |
| When valuing enforceably restricted historical property,<br>R&T Code Section 439.2 mandates that the final valuation be the lesser of the following three: |                                 |  |             |
| Unrestricted Base Year Value   |                                 |  | \$1,335,880 |
| Unrestricted Market Value  |                                 |  | \$1,400,000 |
| Capitalized Value/Blended Value  |                                 |  | \$603,452   |
| <b>FINAL VALUE</b>   |                                 |  | \$603,452   |

# 2020 Trended Base Value Summary Report

APN :

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## Base Values of Active Historical Events

| # | Name                              | BY   | Land % | Imp % | Date      | Land Base   | Imp Base  |
|---|-----------------------------------|------|--------|-------|-----------|-------------|-----------|
| 1 | 75% Partial Interest transfer     | 2017 | 75.0%  | 75.0% | 5/12/2017 | \$1,050,000 | \$510,000 |
| 2 | Original transfer now 25%         | 1984 | 25.0%  | 25.0% | 5/3/1984  | \$93,300    | \$91,700  |
| 3 | RES ADD (pre-MA, included in MA)* | 1985 |        | 25.0% | 7/14/1984 | \$0         | \$14,449  |
| 4 | Add GST HSE (NON-MA)              | 2000 |        | 25.0% | 3/15/2000 | \$0         | \$19,200  |
| 5 |                                   |      |        |       |           |             |           |
| 6 |                                   |      |        |       |           |             |           |

## Trended Base Values of Active Historical Base Values

| #      | Name                              | BY   | Land % | Imp % | CPI Trend* | Land Base   | Imp Base  |
|--------|-----------------------------------|------|--------|-------|------------|-------------|-----------|
| 1      | 75% Partial Interest transfer     | 2017 | 75.0%  | 75.0% | 1.0612     | \$835,701   | \$405,912 |
| 2      | Original transfer now 25%         | 1984 | 25.0%  | 25.0% | 1.89357    | \$44,170    | \$43,408  |
| 3      | RES ADD (pre-MA, included in MA)* | 1985 |        | 25.0% | 1.85188    | \$0         | \$6,689   |
| 4      | Add GST HSE (NON-MA)              | 2000 |        | 25.0% | 1.40312    | \$0         | \$6,735   |
| 5      |                                   |      |        |       |            |             |           |
| 6      |                                   |      |        |       |            |             |           |
| TOTAL: |                                   |      |        |       |            | \$1,335,880 | \$879,871 |
|        |                                   |      |        |       |            |             | \$456,009 |

## NOTES ON 2020 BLENDED VALUE

**NOTE (Partial Interest Transfer):** The above blended values are calculated in the Blended Trended Base Value Calculator. It was created due to the 75% transfer and reassessment for the 2017 Base Year. The transfer resulted in the TBV being 75% (2017 BY) and 25% (1984 BY).

**NOTE (New Construction)** The Mills Act value also needs to be calculated in a blend for any portion that is not Mills Act. The portion that is not Mills Act is the add guest quarters in 2000, in the amt of \$19,200.

**NOTE: (Blended IMP Value)** To calculate the amount retained by the 25% owner, the trended NCC amount (from \$19,200 added for 2000) is multiplied by 25%. The other 75% is trended from the 2017 Base Year. To find the amount to trend it was determined that the guest QTR is 12% of IMP value. This was calculated by taking the original 2000 added value of \$19,200 and dividing it by the total 2000 roll value. The next step is to take that percentage (12%) and multiply it by the 2017 IMP Base Year value (\$510,000), which equals \$45,900. The \$45,900 is then trended going forward and added to the 25% figure to get the blended Proposition 13 value.

**NOTE: (Blended Land):** There is no blending of the land value for this property, due to the size and minimal impact the new construction has on the historical character of the property.

### 2020 SUMMARY:

2020 MA Land: 378,489

2020 MA IMP: 169,511

2020 Non-MA IMP: 55,452 [75% 2017 BY/25% 1984 BY]

Total 2020 MA Value: 603,452