

**RECORDING REQUESTED BY, AND
WHEN RECORDED, MAIL TO:**

**City Clerk's Office
City of Palm Desert
73-510 Fred Waring Drive
Palm Desert, CA 92260-2578**

**FOR THE BENEFIT OF THE
CITY OF PALM DESERT
- NO FEE -
6103 OF THE GOVT. CODE**

(This Space for Recorder's Use Only)

Historic Property Preservation Agreement ("Mills Act Contract")

Between

City of Palm Desert, California

a Municipal Corporation "City"

and

FRASER LIVING TRUST

"Owner"

Legal Description of Property

APN 640-260-009

362 SANDPIPER ST, PALM DESERT CA 92260-3420

Dated: November 16, 2023

(Resolution No. 2022-08 – Case No. CRPC22-01)

Approved at the Palm Desert City Council Meeting of February 10, 2022)

MILLS ACT CONTRACT APPROVED BY RESOLUTION NO. 2023-

(Title of Document)

HISTORIC PROPERTY PRESERVATION AGREEMENT
(“MILLS ACT CONTRACT or Agreement”)

This agreement is made this November 16, 2023, by and between the City of Palm Desert, a municipal corporation (“City”) and FRASER LIVING TRUST (“Owner”).

RECITALS

1. California Government Code section 50280, et. seq. allows cities the discretion to enter into contracts with the owners of qualified historic properties, as that term is defined in Government Code section 50280.1, for the purpose of providing for the use, maintenance, protection, and restoration of such historic property so as to retain its characteristics as property of historic significance.

2. Owner holds fee title in and to that certain real property, together with associated structures and improvements thereon, generally located at the street address **362 SANDPIPER ST.** Palm Desert, California (“Historic Property”). A legal description of the Historic Property is attached hereto as Exhibit “A,” and incorporated herein by this reference.

3. On **February 10, 2022**, the Cultural Resources Preservation Committee and/or the City Council designated the Historic Property as an historic resource pursuant to the terms and provisions of Title 29 of the Palm Desert Municipal Code.

4. City and Owner desire to enter into this Agreement for the purpose of protecting and preserving the characteristics of historical significance of the Historic Property that help provide the community with its own unique civic identity and character.

5. Owner, in consideration for abiding by the terms of this Agreement, shall be entitled to qualify for a reassessment of valuation of the Historic Property, pursuant to the provisions of Chapter 3, Part 2, of Division 1 of the California Revenue and Taxation Code, and any corresponding adjustment in property taxes resulting therefrom.

TERMS NOW, THEREFORE, the City and Owner in consideration of mutual covenants and conditions set forth herein, do hereby agree as follows:

1. Effective Date and Term of Agreement. This Agreement shall be effective and commence on November 16, 2023, (“Effective Date”) and shall remain in effect for a term of ten (10) years thereafter.

2. Yearly Renewal. Each year upon the anniversary of the Effective Date (“Renewal Date”), an additional one (1) year shall automatically be added to the remaining term of the Agreement unless a notice of nonrenewal is delivered as provided in Section 3 of this Agreement.

3. Nonrenewal. If either the Owner or City desires in any year not to renew this Agreement, Owner or City shall serve a written notice of nonrenewal upon the party in advance of the Renewal Date (“Notice of Nonrenewal”). The Notice of Nonrenewal shall be effective only if served by Owner upon City at least ninety (90) days prior to the Renewal Date, or if served by City upon Owner, the Notice of Nonrenewal shall be effective only if served upon Owner at least sixty (60) days prior to the Renewal Date. If either City or Owner serves a Notice of Nonrenewal in any year, this Agreement shall remain in effect for the balance of the term then remaining.

4. Owner Protest of City Nonrenewal. Within fifteen (15) days of Owner’s receipt of the Notice of Nonrenewal from City, Owner may file with City a written protest of the Notice of Nonrenewal. Upon receipt of the written protect, the City Council shall set a hearing prior to the expiration of the Renewal Date of this Agreement. Owner may furnish the City Council with any information which Owner deems relevant and shall furnish the City Council with any information it may require. The City Council may, at any time prior to the annual Renewal Date, withdraw its Notice of Nonrenewal.

5. Standards for Historical Property. During the term of this Agreement, the Historic Property shall be subject to the following conditions, requirements, and restrictions:

- A. Owner shall preserve and maintain the characteristics of the cultural and historical significance of the Historic Property. Attached hereto as Exhibit "B," and incorporated herein by this reference, is a list of the minimum standards and conditions for maintenance, use, protection, and preservation of the Historic Property, which shall apply to the Historic Property and be complied with by Owner throughout the term of this Agreement. In addition, Owner shall comply with the terms of the City's Cultural Resources Ordinance 1168 (Title 29 of the Palm Desert Municipal Code), and shall obtain any applicable permits necessary to protect, preserve, restore, and rehabilitate the Historic Property so as to maintain its historical and cultural significance.
- B. Owner shall, where necessary, repair, maintain, restore, and rehabilitate the Historic Property according to the rules and regulations of the Office of Historic Preservation of the State Department of Parks and Recreation and the City of Palm Desert. The condition of the exterior of the Historic Property on the effective date of this Agreement is documented in photographs attached as Exhibit "C" and incorporated herein by this reference. At a minimum, Owner shall continually maintain the exterior of the Historic Property in the same condition as documented in Exhibit "C."
- C. Owner shall carry out specific restoration, repair, maintenance, and/or rehabilitation projects on the Historic Property, as outlined in the attached Exhibit "D," which is incorporated herein by this reference. All such projects shall be undertaken and completed in accordance with the Secretary of Interior Standards for Rehabilitation and the City of Palm Desert design guidelines.
- D. Owner shall not be permitted to block the view corridor with any new structure, such as walls, fences, or shrubbery, so as to prevent the viewing of the Historic Property from the public right-of-way.

6. Periodic Examinations. Upon reasonable advance notice, Owner shall allow reasonable periodic examinations of the interior and exterior of the Historic Property by representatives of the County Assessor, the State Department of Parks and Recreation, the State Board of Equalization and/or City, as may be necessary to determine Owner's compliance with the terms and provisions of this Agreement. City shall inspect Historic Property prior to entering into this Agreement and at least every five years thereafter to determine Owner's continued compliance with Agreement.

7. Provision of Information of Compliance. Owner hereby agrees to furnish City with any and all information requested by City, which City deems necessary or advisable to determine eligibility of the Historic Property and compliance with the terms and provisions of this Agreement.

8. Breach of Agreement; Remedies.

A. Notice of Breach; Opportunity to Cure. If Owner breaches any provision of this Agreement, City may give written notice to Owner by registered or certified mail detailing Owner's violations. If such violation is not corrected to the reasonable satisfaction of City within thirty (30) days after the date of notice of violation, or within such a reasonable time as may be required to cure the violation (provided the acts to cure the violation are commenced within thirty (30) days and thereafter diligently pursued to completion), the City may, without further notice, declare Owner to be in breach of this Agreement. Upon City's declaration of Owner's breach, City may pursue any remedy available under local, state, or federal law, including those specifically provided for in this section.

B. Remedy - Cancellation. City may cancel this Agreement if City determines, following a duly noticed public hearing in accordance with Government Code section 50286, that Owner breached any of the conditions of the Agreement, Owner allowed the Historic Property to deteriorate to the point that it no longer meets the standards for a

qualified historic property, or Owner failed to maintain and preserve the Historic Property in accordance with the terms of this Agreement. If this Agreement is cancelled, under this paragraph, Owner shall pay a cancellation fee to the Office of the Auditor for the County of Riverside as required by Government Code section 50286.

C. Alternative Remedies. As an alternative to cancellation of this Agreement for Owner's breach of any condition, City may bring an action in court necessary to enforce this Agreement including, but not limited to, an action to enforce this Agreement by specific performance, injunction, or receivership.

9. Destruction of Property; Eminent Domain; Cancellation. If the Historic Property is destroyed by earthquake, fire, flood, or other natural disaster such that in the opinion of the City Building Official more than sixty percent (60%) of the original fabric of the structure must be replaced, this Agreement shall be cancelled because the historic value of the structure will have been destroyed. If the Historic Property is acquired in whole or in part by eminent domain or other acquisition by any entity authorized to exercise the power of eminent domain, and the acquisition is determined by the City Council to frustrate the purpose of this Agreement, this Agreement shall be cancelled. No cancellation fee pursuant to Government Code section 50286 shall be imposed if the Agreement is cancelled pursuant to this Section.

10. Waiver. City does not waive any claim of default by Owner if City does not enforce or cancel this Agreement. All other remedies at law or in equity which are not otherwise provided for in this Agreement or in City's regulations governing historic properties are available to the City to pursue in the event that there is a breach of this Agreement. No waiver by City of any breach or default under this Agreement shall be deemed to be a waiver of any other subsequent breach thereof or default hereunder.

11. Binding Effect of Agreement. Owner hereby subjects the Historic Property to the covenants, conditions, and restrictions set forth in this Agreement. City and Owner hereby declare their specific intent that the covenants, conditions, and

restrictions set forth herein shall be deemed covenants running with the land and shall inure to and be binding upon Owner's successors and assigns in title or interest to the Historic Property. Each and every contract, deed or other instrument herein after executed, covering or conveying the Historic Property, or any portion thereof, shall conclusively be held to have been executed, delivered and accepted subject to the covenants, reservations and restrictions are set forth in such contract, deed or other instrument.

12. Covenants Run with the Land. City and Owner hereby declare their understanding and intent that the burden of the covenants, reservations and restrictions set forth herein touch and concern the land in that it restricts development of the Historic Property. City and Owner hereby further declare their understanding and intent that the benefit of such covenants, reservations and restrictions touch and concern the land by enhancing and maintaining the cultural and historical characteristics and significance of the Historic Property for the benefit of the public and the Owner.

13. Notice. Any notice required to be given by the terms of this Agreement shall be provided at the address of the respective parties as specified below or at any other address as may be later specified by the parties hereto:

City: City of Palm Desert
Planning Division
73-510 Fred Waring Drive
Palm Desert, CA 92260

Owner: FRASER LIVING TRUST
362 SANDPIPER ST.
PALM DESERT CA 92260-3420 C035

14. Effect of Agreement. None of the terms, provisions or conditions of this Agreement shall be deemed to create a partnership between the parties hereto and any of their heirs, successors or assigns, nor shall such terms, provisions or conditions cause the parties to be considered joint venturers or members of any joint enterprise.

15. Indemnity of City. Owner shall defend, indemnify, and hold harmless City and its elected officials, officers, agents and employees from any actual or alleged claims, demands, causes of action, liability, loss, damage, or injury to property or persons, including wrongful death, whether imposed by a court of law or by administrative action of any federal, state or local governmental agency, arising out of or incident to (i) the direct or indirect use operation, or maintenance of the Historic Property by Owner or any contractor, subcontractor, employee, agent, lessee, licensee, invitee, or any other person; (ii) Owner's activities in connection with the Historic Property; and (iii) any restrictions on the use or development of the Historic Property, from application or enforcement of Title 29 of the City's Municipal Code, or from the enforcement of this Agreement. This indemnification includes, without limitation, the payment of all penalties, fines, judgments, awards, decrees, attorneys' fees, and related costs or expenses, and the reimbursement of City, its elected officials, employees, and/or agents for all legal expenses and costs incurred by each of them.

Owner's obligation to indemnify shall survive the termination, cancellation, or expiration of this Agreement and shall not be restricted to insurance proceeds, if any, received by City, its elected officials, employees, or agents.

16. Binding Upon Successors. All of the agreements, rights, covenants, reservations and restrictions contained in this Agreement shall be binding upon and shall inure to the benefit of the parties herein, their heirs, successors, legal representatives, assigns and all persons acquiring any part or portion of the Historic Property, whether by operation of law or in any manner whatsoever.

17. Legal Costs. In the event legal proceedings are brought by any party or parties to enforce or restrain a violation of any of the covenants, conditions or restrictions contained herein, or to determine the rights and duties of any party hereunder, the prevailing party in such proceeding may recover all reasonable

attorneys' fees to be fixed by the court, in addition to court costs and other relief ordered by the court.

18. Severability. In the event that any of the provisions of this Agreement are held to be unenforceable or invalid by any court of competent jurisdiction, or by subsequent preemptive legislation, the validity and enforceability of the remaining provisions, or portions thereof, shall not be affected thereby.

19. Recordation. No later than twenty (20) days after the Effective Date, City shall cause this Agreement to be recorded in the office of the County Recorder of the County of Riverside.

20. Amendments. This Agreement may be amended, in whole or in part, only by written recorded instrument executed by the parties hereto.

21. Governing Law and Venue. This Agreement shall be construed and governed in accordance with the laws of the State of California. Any action at law or in equity brought by either of the parties hereto for the purpose of enforcing a right or rights provided for by this Agreement shall be tried in a court of competent jurisdiction in the County of Riverside, State of California, and the parties hereby waive all provisions of law providing for a change of venue in such proceedings to any other county.

IN WITNESS WHEREOF, City and Owner have executed this Agreement on the day and year first above written.

Dated: _____

CITY OF PALM DESERT

By _____
KATHLEEN KELLY, MAYOR

ATTEST:

By _____
ANTHONY J. MEJIA, CITY CLERK
CITY OF PALM DESERT, CALIFORNIA

APPROVED AS TO FORM

ISRA SHAH
CITY ATTORNEY

Dated: _____

OWNER

By: _____
BARBARA FRASER, OWNER

By: _____
BRENT FRASER, OWNER

By: _____
OWNER

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of _____ }
County of _____ } SS.

On _____, **2023**, before me, _____, a Notary Public, personally appeared _____, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature _____

Exhibit "A"

LEGAL DESCRIPTION OF HISTORIC PROPERTY

PARCEL 1:

LOT 77 OF TRACT NO. 3103, IN THE CITY OF PALM DESERT, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA, AS SHOWN BY MAP ON FILE IN BOOK 54 PAGES 36, 37 AND 38 OF MAPS, RECORDS OF RIVERSIDE COUNTY, CALIFORNIA.

PARCEL 2:

AN UNDIVIDED 1/24TH INTEREST IN AND TO LOT 99 OF TRACT NO. 3103 AS SHOWN BY MAP ON FILE IN BOOK 54 PAGES 36, 37 AND 38 OF MAPS, RECORDS OF RIVERSIDE COUNTY, CALIFORNIA.

EXCEPTING THEREFROM ALL THAT PORTION IN LOT 99 AS CONVEYED TO COUNTRY CLUB COTTAGES, INC., BY DEED RECORDED SEPTEMBER 1, 1965 AS INSTRUMENT NO. 101369, OFFICIAL RECORDS.

*****END OF LEGAL DESCRIPTION*****

Exhibit “B”
Property Maintenance Minimum Standards

1. The Historic District Property shall comply with all regulations of Title 8 and Title 9 of the Palm Desert Municipal Code, including the definition of “Good Repair” as outlined in Section 29.20 and 29.60.160;
2. The Historic Property shall continue to be maintained in a manner consistent with the level of maintenance that has customarily been employed at the property and consistent with the typical condominium development in the Palm Desert Area.
3. The Historic Property shall not have non-operational vehicles or portions of them in public view.
4. The Historic Property Shall not have stagnant or standing water.
5. The Historic Property Shall not have overgrown or decaying landscaping. All landscape features should be maintained including, but not limited to, grass, trees, and any plantings.
6. The Historic Property shall prominently display and properly maintain its City Landmark plaque.

Exhibit "C"
Exterior Photographs of Historic Property



Exhibit "D"

10-Year Improvement Plan

10 Year Project Improvement Plan		362 Sandpiper St. Palm Desert, CA 92260		
Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		HOA	Per Homeowner	
1 (2024-25)	1.1 HOA Annual Maintenance/Repairs			<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>
	1.1.1 Operating Expenditures			<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2023-24 fiscal year (07/01-06/30)</i>
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	● Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091 Seed, Fertilizer, Plants	4,320.01	180.00	● Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	● Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	● Repairs to 60 year old Irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	● Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	● Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	● Specific pool and pool equipment related repairs
	7150 Pest Control	1,985.98	82.75	● Prevent pest infestation/damage to buildings, structures and fixtures
	7190 Tree Trimming	3,585.00	149.38	● Palm tree trimming to ensure health and appearance of plants
	7210 Common Area Repairs	1,452.63	60.53	● Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting
	Subtotal	68,042.84	2,835.12	
	1.1.2 Reserve Expenditures			<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2023-24 fiscal year (07/01-06/30)</i>
	Asphalt - Seal Coat	2,296.79	95.70	● Seal coat all asphalt (13,117 SF), incl. Pitahaya St. parking area.
	Grounds - Common Area	3,605.00	150.21	● Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Grounds - Mailboxes	3,605.00	150.21	● Replace two (2) mailboxes
	Irrigation - System Renovation, Phase 2	19,570.00	815.42	● Major renovation to irrigation system in four (4) phases
	Painting - Wrought Iron	4,635.00	193.13	● Paint the perimeter fencing and (13) light poles.
	Pool Area - Extras	515.00	21.46	● Misc pool/pool area related repair (eg. pool mastic)
	Subtotal	34,226.79	1,426.12	
	Subtotal (HOA)	68,042.84	4,261.23	
	1.2 Specific Homeowner Projects			
	Paint exterior beams		N/A	2,000.00
	Subtotal (Homeowner)		N/A	2,000.00
	Total			6,261.23

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10 Year Project Improvement Plan		362 Sandpiper St. Palm Desert, CA 92260		
Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		HOA	Per Homeowner	
2 (2025-26)	2.1 HOA Annual Maintenance/Repairs			<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>
	2.1.1 Operating Expenditures			<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2024-25 fiscal year (07/01-06/30)</i>
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	● Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091 Seed, Fertilizer, Plants	4,320.01	180.00	● Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	● Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	● Repairs to 60 year old Irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	● Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	● Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	● Specific pool and pool equipment related repairs
	7150 Pest Control	1,985.98	82.75	● Prevent pest infestation/damage to buildings, structures and fixtures
	7190 Tree Trimming	3,585.00	149.38	● Palm tree trimming to ensure health and appearance of plants
	7210 Common Area Repairs	1,452.63	60.53	● Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting
	Subtotal	68,042.84	2,835.12	
	2.1.2 Reserve Expenditures			<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2024-25 fiscal year (07/01-06/30)</i>
	Grounds - Common Area	3,713.15	154.71	● Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Irrigation - System Renovation, Phase 3	21,218.00	884.08	● Major renovation to irrigation system in four (4) phases
	Pool Area - Extras	530.45	22.10	● Misc pool/pool area related repair (eg. pool mastic)
	Pool Area - Pool, Replaster	27,695.86	1153.99	● Replaster the pool and replace the tile.
	Subtotal	53,157.46	2,214.89	
	Subtotal (HOA)	121,200.30	5,050.01	
	2.2 Specific Homeowner Projects			
	HVAC maintenance		N/A	500.00
	Front door repair and paint			400.00
	Subtotal (Homeowner)		N/A	900.00
	Total			5,950.01

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Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		HOA	Per Homeowner	
3 (2026-27)	3.1 HOA Annual Maintenance/Repairs			<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>
	3.1.1 Operating Expenditures			<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2025-26 fiscal year (07/01-06/30)</i>
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	● Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091 Seed, Fertilizer, Plants	4,320.01	180.00	● Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	● Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	● Repairs to 60 year old Irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	● Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	● Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	● Specific pool and pool equipment related repairs
7150 Pest Control	1,985.98	82.75	● Prevent pest infestation/damage to buildings, structures and fixtures	
7190 Tree Trimming	3,585.00	149.38	● Palm tree trimming to ensure health and appearance of plants	
7210 Common Area Repairs	1,452.63	60.53	● Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting	
	Subtotal	68,042.84	2,835.12	
3.1.2 Reserve Expenditures				<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2025-26 fiscal year (07/01-06/30)</i>
	Grounds - Common Area	3,824.54	159.36	● Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Grounds - Entry Gates, Wrought Iron	7,430.54	309.61	● Replace the wrought iron entry gates and locks
	Irrigation - System Renovation, Phase 4	21,854.54	910.61	● Major renovation to irrigation system in four (4) phases
	Pool Area - Extras	546.36	22.77	● Misc pool/pool area related repair (eg. pool mastic)
	Subtotal	33,655.98	1,402.33	
	Subtotal (HOA)	101,698.82	4,237.45	
	3.2 Specific Homeowner Projects			
	<i>New Dishwasher</i>	N/A	1,000.00	
	<i>Roof repair</i>	N/A	1,000.00	
	<i>Skylights Repair or replace</i>			
	Subtotal (Homeowner)		2,000.00	
	Total		5,237.45	

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skylights - repair/replace

Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		HOA	Per Homeowner	
4 (2027-28)	4.1 HOA Annual Maintenance/Repairs			<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>
	4.1.1 Operating Expenditures			<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2026-27 fiscal year (07/01-06/30)</i>
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	● Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091 Seed, Fertilizer, Plants	4,320.01	180.00	● Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	● Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	● Repairs to 60 year old Irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	● Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	● Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	● Specific pool and pool equipment related repairs
7150 Pest Control	1,985.98	82.75	● Prevent pest infestation/damage to buildings, structures and fixtures	
7190 Tree Trimming	3,585.00	149.38	● Palm tree trimming to ensure health and appearance of plants	
7210 Common Area Repairs	1,452.63	60.53	● Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting	
	Subtotal	68,042.84	2,835.12	
4.1.2 Reserve Expenditures				<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2026-27 fiscal year (07/01-06/30)</i>
	Grounds - Common Area	3,939.28	164.14	● Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Grounds - Shuffleboard	1,575.71	65.65	● Resurface the shuffleboard court.
	Grounds - Surveillance System	7,315.81	304.83	● Replace surveillance system (four dome cameras and one DVR)
	Pool Area - Extras	562.75	23.45	● Misc pool/pool area related repair (eg. pool mastic)
	Subtotal	13,393.55	558.06	
	Subtotal (HOA)	81,436.39	3,393.18	
	4.2 Specific Homeowner Projects			
	Roof roof/repairs	N/A	5,000.00	
	Subtotal (Homeowner)		5,000.00	
	Total		8,393.18	

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Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		Per HOA	Per Homeowner	
5 (2028-29)	5.1 HOA Annual Maintenance/Repairs			<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>
	5.1.1 Operating Expenditures			<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2027-28 fiscal year (07/01-06/30)</i>
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	• Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091 Seed, Fertilizer, Plants	4,320.01	180.00	• Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	• Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	• Repairs to 60 year old Irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	• Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	• Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	• Specific pool and pool equipment related repairs
	7150 Pest Control	1,985.98	82.75	• Prevent pest infestation/damage to buildings, structures and fixtures
	7190 Tree Trimming	3,585.00	149.38	• Palm tree trimming to ensure health and appearance of plants
	7210 Common Area Repairs	1,452.63	60.53	• Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting
	Subtotal	68,042.84	2,835.12	
	5.1.2 Reserve Expenditures			<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2027-28 fiscal year (07/01-06/30)</i>
	Grounds - Common Area	4,057.46	169.06	• Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Painting - Trim	11,685.48	486.90	• Paint the wood and metal trim of the units
	Painting - Wrought Iron	5,216.73	217.36	• Paint the perimeter fencing and (13) light poles.
	Pool Area - Extras	579.64	24.15	• Misc pool/pool area related repair (eg. pool mastic)
	Pool Area - Pool, Heater	4,173.39	173.89	• Replace the Raypack pool heater
	Subtotal	25,712.70	1,071.36	
	Subtotal (HOA)	93,755.54	3,906.48	
	5.2 Specific Homeowner Projects			
	Screen repair		N/A 500.00	
	Subtotal (Homeowner)		500.00	
	Total		4,406.48	

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Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		Per HOA	Per Homeowner	
6 (2029-30)	6.1 HOA Annual Maintenance/Repairs			<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>
	6.1.1 Operating Expenditures			<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2028-29 fiscal year (07/01-06/30)</i>
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	• Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091 Seed, Fertilizer, Plants	4,320.01	180.00	• Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	• Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	• Repairs to 60 year old Irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	• Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	• Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	• Specific pool and pool equipment related repairs
	7150 Pest Control	1,985.98	82.75	• Prevent pest infestation/damage to buildings, structures and fixtures
	7190 Tree Trimming	3,585.00	149.38	• Palm tree trimming to ensure health and appearance of plants
	7210 Common Area Repairs	1,452.63	60.53	• Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting
	Subtotal	68,042.84	2,835.12	
	6.1.2 Reserve Expenditures			<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2028-29 fiscal year (07/01-06/30)</i>
	Asphalt - Seal Coat	2,662.61	110.94	• Seal coat all asphalt (13,117 SF), incl. Pitahaya St. parking area.
	Grounds - Common Area	4,179.18	174.13	• Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Irrigation - Controllers (2017)	1,910.48	79.60	• Replace the five (2) controllers installed in 2017
	Pool Area - Extras	597.03	24.88	• Misc pool/pool area related repair (eg. pool mastic)
	Subtotal	9,349.30	389.55	
	Subtotal (HOA)	77,392.14	3,224.67	
	6.2 Specific Homeowner Projects			
	new closet doors		N/A 5,000.00	
	Vent/duct cleaning		N/A 5,000.00 500.00	
	Subtotal (Homeowner)		5,500.00	
	Total		8,224.67	

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Vent/duct cleaning

Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		HOA	Per Homeowner	
7 (2030-31)	7.1 HOA Annual Maintenance/Repairs			Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)
	7.11 Operating Expenditures			The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2029-30 fiscal year (07/01-06/30)
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	• Maintain and improve current landscape incl. ad hoc irrigation repairs
	7081 Seed, Fertilizer, Plants	4,320.01	180.00	• Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	• Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	• Repairs to 60 year old irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	• Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	• Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	• Specific pool and pool equipment related repairs
	7190 Pest Control	1,985.98	82.75	• Prevent pest infestation/damage to buildings, structures and fixtures
	7190 Tree Trimming	3,585.00	149.38	• Palm tree trimming to ensure health and appearance of plants
	7210 Common Area Repairs	1,452.63	60.53	• Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting
	Subtotal	68,042.84	2,835.12	
	7.12 Reserve Expenditures			Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2029-30 fiscal year (07/01-06/30)
	Grounds - Common Area	4,304.56	179.36	• Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Pool Area - Extras	614.94	25.62	• Misc pool/pool area related repair (eg. pool mastic)
	Subtotal	4,919.50	204.98	
	Subtotal (HOA)	72,962.34	3,040.10	
	7.2 Specific Homeowner Projects			
	<i>New boulder to enhance front</i>		N/A 500.00	
	<i>Appliance Vent</i>		N/A 500.00 700.00	
	Subtotal (Homeowner)		700.00	
	Total		3,540.10	

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Appliance Vent

Year	Projects/Areas	Est. Annual Cost		Notes/Comments
		HOA	Per Homeowner	
8 (2031-32)	8.1 HOA Annual Maintenance/Repairs			Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)
	8.11 Operating Expenditures			The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2030-31 fiscal year (07/01-06/30)
	<i>GL Acct Code</i>			
	7080 Landscape Contract	43,200.00	1,800.00	• Maintain and improve current landscape incl. ad hoc irrigation repairs
	7081 Seed, Fertilizer, Plants	4,320.01	180.00	• Replace and care for turf and plants
	7100 Landscape Repairs & Maint	3,235.03	134.79	• Repairs and replacement to landscape elements
	7120 Irrigation Repairs	2,940.43	122.52	• Repairs to 60 year old irrigation system which covers 3 acres
	7121 Lighting Repairs & Maint	1,973.76	82.24	• Maintain historic lighting infrastructure
	7130 Pool Contract	3,900.00	162.50	• Cleaning & upkeep to ensure proper chemical levels to preserve pool
	7140 Pool & Spa Repairs	1,450.00	60.42	• Specific pool and pool equipment related repairs
	7190 Pest Control	1,985.98	82.75	• Prevent pest infestation/damage to buildings, structures and fixtures
	7190 Tree Trimming	3,585.00	149.38	• Palm tree trimming to ensure health and appearance of plants
	7210 Common Area Repairs	1,452.63	60.53	• Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting
	Subtotal	68,042.84	2,835.12	
	8.12 Reserve Expenditures			Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2030-31 fiscal year (07/01-06/30)
	Grounds - Common Area	4,433.70	184.74	• Misc. reserve expenditures (fans, trash receptacles and gates, carports)
	Painting - Pool Cabana	3,800.31	158.35	• Paint the beams, blockwall and sunflaps of cabana
	Pool Area - Extras	633.39	26.39	• Misc pool/pool area related repair (eg. pool mastic)
	Subtotal	8,867.40	369.48	
	Subtotal (HOA)	76,910.24	3,204.59	
	8.2 Specific Homeowner Projects			
	Paint Interior		N/A 3,500.00	
	Subtotal (Homeowner)		3,500.00	
	Total		6,704.59	

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Year	Projects/Areas	Est. Annual Cost		Notes/Comments	
		Per HOA	Per Homeowner		
9 (2032-33)	9.1 HOA Annual Maintenance/Repairs				
	<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>				
	<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2031-32 fiscal year (07/01-06/30)</i>				
	9.1.1 Operating Expenditures				
	<i>GL Acct Code</i>				
	7080	Landscape Contract	43,200.00	1,800.00	● Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091	Seed, Fertilizer, Plants	4,320.01	180.00	● Replace and care for turf and plants
	7100	Landscape Repairs & Maint	3,235.03	134.79	● Repairs and replacement to landscape elements
	7120	Irrigation Repairs	2,940.43	122.52	● Repairs to 60 year old Irrigation system which covers 3 acres
	7121	Lighting Repairs & Maint	1,973.76	82.24	● Maintain historic lighting infrastructure
7130	Pool Contract	3,900.00	162.50	● Cleaning & upkeep to ensure proper chemical levels to preserve pool	
7140	Pool & Spa Repairs	1,450.00	60.42	● Specific pool and pool equipment related repairs	
7150	Pest Control	1,985.98	82.75	● Prevent pest infestation/damage to buildings, structures and fixtures	
7190	Tree Trimming	3,585.00	149.38	● Palm tree trimming to ensure health and appearance of plants	
7210	Common Area Repairs	1,452.63	60.53	● Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting	
	Subtotal	68,042.84	2,835.12		
9.1.2 Reserve Expenditures					
<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2031-32 fiscal year (07/01-06/30)</i>					
	Grounds - Common Area	4,566.71	190.28	● Misc. reserve expenditures (fans, trash receptacles and gates, carports)	
	Painting - Wrought Iron	5,871.48	244.65	● Paint the perimeter fencing and (13) light poles.	
	Pool Area - Extras	652.39	27.18	● Misc pool/pool area related repair (eg. pool mastic)	
	Subtotal	11,090.58	462.11		
	Subtotal (HOA)	79,133.42	3,297.23		
9.2 Specific Homeowner Projects					
	New-toilets	N/A	1,000.00		
	<i>Interior Painting</i>	N/A	2,000.00	2,000.00	
	Subtotal (Homeowner)				
	Total		4,297.23		

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Security lighting/alarm system

Year	Projects/Areas	Est. Annual Cost		Notes/Comments	
		Per HOA	Per Homeowner		
10 (2033-34)	10.1 HOA Annual Maintenance/Repairs				
	<i>Pro-rata share of HOA budget/homeowner (1 of 24 homeowners)</i>				
	<i>The amounts show are from 2021 Sandpiper 3 on El Paseo HOA ("Circle 3") GL transaction records for areas specific to Mills Act; will be updated with GL actuals over City 2032-33 fiscal year (07/01-06/30)</i>				
	10.1.1 Operating Expenditures				
	<i>GL Acct Code</i>				
	7080	Landscape Contract	43,200.00	1,800.00	● Maintain and improve current landscape incl. ad hoc irrigation repairs
	7091	Seed, Fertilizer, Plants	4,320.01	180.00	● Replace and care for turf and plants
	7100	Landscape Repairs & Maint	3,235.03	134.79	● Repairs and replacement to landscape elements
	7120	Irrigation Repairs	2,940.43	122.52	● Repairs to 60 year old Irrigation system which covers 3 acres
	7121	Lighting Repairs & Maint	1,973.76	82.24	● Maintain historic lighting infrastructure
7130	Pool Contract	3,900.00	162.50	● Cleaning & upkeep to ensure proper chemical levels to preserve pool	
7140	Pool & Spa Repairs	1,450.00	60.42	● Specific pool and pool equipment related repairs	
7150	Pest Control	1,985.98	82.75	● Prevent pest infestation/damage to buildings, structures and fixtures	
7190	Tree Trimming	3,585.00	149.38	● Palm tree trimming to ensure health and appearance of plants	
7210	Common Area Repairs	1,452.63	60.53	● Ad hoc repairs to cabana, fence, sidewalks, electrical and lighting	
	Subtotal	68,042.84	2,835.12		
10.1.2 Reserve Expenditures					
<i>Forecasted reserve expenditures by year from April 2022 Reserve Analysis Report - select categories specific to Mills Act; will be updated with actual expenditures over City 2032-33 fiscal year (07/01-06/30)</i>					
	Grounds - Common Area	4,703.71	195.99	● Misc. reserve expenditures (fans, trash receptacles and gates, carports)	
	Painting - Trim	13,546.68	564.45	● Paint the wood and metal trim of the units	
	Painting - Units, Stucco & Trim	54,159.83	2256.66	● Paint residential units exteriors	
	Pool Area - Extras	671.96	28.00	● Misc pool/pool area related repair (eg. pool mastic)	
	Pool Area - Pool, Pump	2,217.46	92.39	● Replace the Pentair Intelle-Flo variable speed pool pump	
	Subtotal	75,299.64	3,137.49		
	Subtotal (HOA)	143,342.48	5,972.60		
10.2 Specific Homeowner Projects					
	Sunfap and post replacement	N/A	5,000.00		
	<i>Repair Overhang</i>	N/A	5,000.00		
	Subtotal (Homeowner)				
	Total		10,972.60		

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Repair Overhang