

Summary of Information Regarding Traffic Gate for Whisler Ridge

The Board undertook an effort, based on verifiable information and estimates, to advise Residents on the feasibility and costs of gating the Community.

The information below is based measurements of the entry to Whisler Ridge and discussions with the Orange County Fire Authority Planning Dept. ("OCFA"), the City of Lake Forest Traffic Engineer, and California Gate Systems as well as review of the Orange County Public Works Standard Plans ("OCPWSP").

Feasibility

A traffic gate is legally feasible, but presents significant engineering challenges, adverse aesthetic impacts, adverse impacts to the homes adjacent to the entry, and substantial capital assessment costs that each Resident would have to bear.

The first issue is whether the length of Whisler Ridge Drive is adequate. KB apparently advised that the entry was too short which is not correct. The distance between the near curbs of Osterman and Willow Way is over 108 feet. See drawings on 5 below which shows distance from Osterman to the gate pedestal. The City requires 100 feet based on the OCPWSP which the City adopted. See <http://www.ocpublicworks.com/civicax/filebank/blobdload.aspx?blobid=27408> Std. Plan 1107, Page 3. We have 108 feet.

The second issue is what, if any, turnaround is required for vehicles. Contrary to some earlier rumors, OCFA does not require a turn-around for fire vehicles if entry is less than 150 feet from a public intersection. This was confirmed with OCFA Planning Dept. and is set forth in: <http://www.ocfa.org/Uploads/CommunityRiskReduction/OCFA%20Guide-B09-Fire%20Master%20Plan%20For%20Commercial%20and%20Residential.pdf> Attachment 17, Page 55.

However, the OCPWSP and therefore our City requires a 60 foot diameter turn-around before gate entry to accommodate traffic that cannot gain entry. See <http://www.ocpublicworks.com/civicax/filebank/blobdload.aspx?blobid=27408> The WR entry street is 40 feet wide. According to California Gate, some cities have adopted a different requirement which supersede OC standards. Many other cities only require a 50 foot diameter turn-around. Newport Beach requires a 52 foot turn-around based on Caltrans standards. The only way to reduce the 60 foot turn-around diameter would be to get approval from City Planning/Public Works ("CPPW"). Whether CPPW or the City Council has any discretion, within the ordinance itself, to override the legal requirements is unknown at this time. We are awaiting the City's response on this issue. In any case, if we were to submit a reduced diameter proposal, preliminary plans would need to be drawn up for City review. CG estimates a preliminary design would cost \$6000 - \$15,000. The process for obtaining a reduced turn-around diameter, the City Planning advised, would not fall with the City Council's variance authority as do zoning exceptions.

Providing a 50 or 60 foot turn-around on Whisler Ridge Drive presents engineering feasibility issues as it adds a 10 or 15 foot expansion to both sides of the street as a sidewalk must also have to be installed. The existing sidewalk plus curb (which is believed to be the minimum legal width) would add an additional 5 feet to either side (including curb). See Std. Plan 1107. Thus, the minimum total expansion would be 60 feet (including sidewalk) and the maximum would be 70 feet (including sidewalk). In either case, portions of the existing retaining walls on both sides would have to be removed as well as landscaping and electrical. It is not known if these retaining walls are structural or, if soil removal beyond the retaining walls into the slopes would cause a structural impact.

In sum, with proper engineering and structural design, a gate is legally and theoretically feasible but, practically, would be very difficult to install with either the 60 or 70 foot width requirements. Additionally, the Community would need to consider the degree of adverse impact on the homes immediately adjacent to the entry as well as the negative aesthetic impact on the Whisler Ridge entry drive. If the four adjacent homeowners' home values were impacted, the Community would need to consider the prospects of a costly legal challenge and possible compensation.

Costs

Based on information provided by California Gate Systems, the preliminary cost estimate is from \$120,000 to \$150,000 for installation though, based on conversations with CG, the upper limit is more realistic. See pages 5-7 below. CG's estimate is based on widening of part of the road to 50 feet. To achieve 60 feet, we were advised, would add substantially to the costs. Estimates for a 60 foot diameter have not been explored. Sidewalks would still be required. Assuming either the 50 or 60 foot turn-around would be required, with sidewalks moved, electrical, irrigation, and landscaping changes, the costs are likely a minimum of \$150,000 which would require a one-time assessment of each homeowner of \$2206. With added engineering costs, movement of sidewalks, re-landscaping, and needed HOA irrigation modifications, a reasonable estimate would add another \$50,000 to the total cost according to discussions with CG. \$150,000 would require a one-time assessment of each homeowner of \$2206; \$200,000 would require an assessment of \$2941. The costs of a legal challenge and/or compensation to the four adversely affected homeowners is difficult to estimate but litigation is costly.

Annual maintenance and reserve costs including gate, telephone, lighting, painting about every 5 years, replacement of control equipment about every 10 years, and miscellaneous tasks would be in the range of \$4080 annually according to CG. This would increase the monthly assessment approximately \$5. Additional capital costs over the years may be required. We will ask Action for information on its experience with gate maintenance fees for other communities.

Practical Considerations

There are pros and cons to security gates and Residents can do their own research on those issues including whether the capital cost, maintenance, and future costs justify the expenditure. Independent of costs, evaluating the pros and cons is often based on personal opinions about various issues. There is

disagreement on the degree of increased security an unattended gate might provide. Many communities find that security cameras are also necessary (This cost is not included in the estimates). There is also disagreement on whether a gate increases property values and how much. For the homes near the gate, it may diminish property values. Other factors such as location, home quality, amenities, crime and schools, would play a much larger role in home valuation. One other factor that might not be obvious is that our community has only one entry/exit road and, if the gate were to fail for mechanical or other reasons, despite battery back-up, Residents need to know that entry or exit could be delayed.

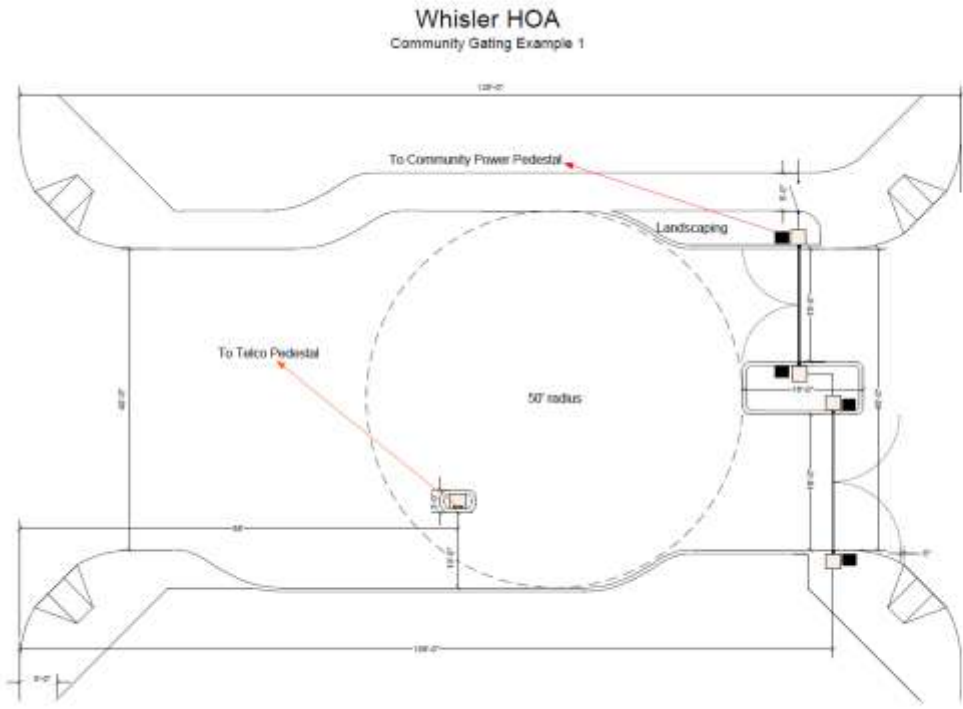
CC&R Requirements for Capital Assessments

To proceed with a capital project, like the contemplated traffic gate, where the cost exceeds 5% of the annual budget, a majority of a quorum of homeowners must approve such an expenditure. CCR 6.7.1. A quorum is 50% of the Resident homes. If fewer than 50% of homeowners support a traffic gate, it would be unlikely that a quorum could be achieved.

Community Input

If you have comments or questions, please email scool@actionlife.com who will pass on your comments to the Board. Please indicate your support or disapproval for a traffic gate, given the required capital assessment, related costs and other issues.

At the September 18 Board meeting, it was suggested that a poll of residents be conducted. Any poll conducted would be informal at this point but it would give a sense of the Community views and thus how to proceed. A valid poll would require that Residents be fully informed on costs and other factors.



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Quantity	Seven Gates	PROPERTY ADDRESS	Whisler Ridge HOA Whisler Ridge HOA 1001 Pine Management Trail 10011 Red Oak Ave. Suite 201 Lake Forest, CA	OWNER	Whisler Ridge HOA 1001 Pine Management Trail 10011 Red Oak Ave. Suite 201 Lake, CA 92750	CONTRACTOR	California Gate and Entry Systems 10011 Red Oak Ave. Suite 201 Lake Forest, CA 92750	PROJECT	Community Gating Example 1
Date:	01/15/17								
Scale:	1" = 10'								
Page Size:	11" x 17"								
Job #	16040								



10011 Red Oak Ave. Suite 201
Lake Forest, CA 92750



July 25th, 2017

To: Whisler Ridge Owners Association
16 Willow Way
Lake Forest, CA 92630

Attn: Richard Boote

Sent Via Email: willowwayhoa@gmail.com

Subject: Budget for Vehicle Gates and Automation

Hello Mr. Boote,

Thank you for the opportunity to provide a solution for your gate and automation needs at the Whisler Ridge in Lake Forest. We strive to give every community a smooth and easy transition during the process of becoming a gated community. We know how important security is to your residents and will do everything we can to ensure your satisfaction during this process.

California Gate and Entry Systems has been providing gate and automation solutions for over three decades, and we pride ourselves on quality and customer service. California Gate is a licensed General Contractor and will oversee and ensure that quality is maintained throughout the installation process. Our company will provide a unique service that will supply all of the concept design drawings and initial visit(s) to the city planner for pre-approval. All findings will be reported to your Property Manager/Board Members directly. Once we have plan/check review complete and based on City requirements, we will provide a detailed proposal and scope of work to your board for final approval and begin the permitting process. If you choose to use our company for your installation, we will credit the initial investment paid to us for your preliminary drawings and pre-approval requirements. We will continue to consult you on your project throughout the process.

Before we can provide an accurate price for this installation we want to inform you of the processes involved in gating a community and considerations you might want take during the preliminary steps. This is simply to keep you mindful of unexpected costs that may come up during the planning and city approval stages.

Please Note: This quote is only for budgetary purposes and should not be used for actual cost or proposal to perform this work. True pricing will be based on final city requirements for this installation. However, based on the information below we estimate the complete installation of new entry and exit vehicle gates with guest entry phone at your community to be **approximately \$120,000-150,000.** Please see below for budget information and considerations.

Gate and Automation Preliminary Processes and Budget

A. City Requirements and Standards

1. Each city has standards and requirements that need to be taken into consideration for gating a community. Each city is different and varies in strictness. But the following are some examples:
 - i. Sufficient space is required for a Guest Entry Phone and turnaround for denied guests.
 - ii. Most cities require a turnaround of 50-60 feet outside radius.
 - iii. Stacking distance for guest lane.
 1. Cars backing up into the street waiting to enter the community.
 2. Business of the street where stacking will occur.
 3. For an example of a strict city, Irvine requires 1 foot per residential unit for stacking distance, but every city is different.
 - iv. Pedestrian access—whether or not pedestrian gates, fencing, and any new sidewalks will be required.
 - v. Emergency Vehicle Access—for example, fire trucks in particular require sufficient turning radius clearance.
2. Although these are general guidelines and examples, variance and exceptions can be granted depending on the city.
 1. Circumstances and automation setups of nearby gated communities can influence exceptions granted by the city.
 2. Installations including items such as RFID antennas and bi-pass lanes also can contribute to leniency.

B. Budget Pricing for Gating a Community

1. Pricing for a standard wrought iron vehicle gate entry and exit setup *without street improvements* ranges between **\$40,000** and **\$60,000**, depending on the design.
 - i. This includes standard fabricated wrought-iron entry and exit vehicle gates, guest entry phone and gooseneck, basic access control, complete automation, in-ground loops, anti-entrapment system, KNOX switch.
 - ii. Complete installation will follow ASTM220 and UL325 and other city requirements.
 - iii. Note this budget does not include any street improvements that may be required for turnaround distance, stacking distance, sidewalks, and other city requirements.
2. City requirements for street improvements and enhancements can vary greatly depending on strictness of the city and the setup of your community's vehicle lanes.
 - i. Price for street improvements and enhancements can range between **\$10,000 and \$100,000**.
 1. Requirements such as widened streets for turnaround or stacking distance, sidewalks with ADA ramps, and landscape adjustments are not uncommon.

C. Moving Forward with the Project

1. If you determine that you want to move forward our team will create CAD drawings and engineer a preliminary design and meet with your city.
 - i. After the initial meeting we can enhance the plans to move forward with planning traffic, safety, engineering, and building and safety.
 - ii. Please see attached drawing for example of initial city plans for turnaround requirements and general design.
2. We bill hourly for our CAD design and engineering team plus costs for city plan review and permits.
 - i. Typical costs, depending on the city, will range from **\$6,000 to \$15,000**.
 - ii. Plans, Permits, drawings, and other governmental agency fees will be billed to the customer as follows:
 1. All man hours for the process of any necessary travel, city planning office visits, necessary engineering and design drawing will be billed **per hour** during this process.
 2. The Per Hour price will be set at **\$60.00** per hour for CAD work.
 3. Project manager time is **\$95.00** per hour.
 4. California Gate will report all man hours on a detailed form per week to the customer for billing.
 5. All permit fees, plan check, city, and other agency fees will be billed to customer directly at face value (no mark up or additional charges).
 6. California Gate will report all incurred fees every week, when acquired, to the customer for billing against the allotment.
 - iii. If the total of all plans, permits, drawings, and other governmental agency fees do not exceed the total allotment, the customer will be credited the California Gate Project Manager and CAD Fees on the installation contract amount.
3. Once we get the plans to the permitting stage you will have incurred all the costs. We will continue to coordinate and take care of every interaction with the city to get the installation going if the community approves our contract.

D. Final Notes and Exceptions

1. Although we install a wide range of systems and can certainly install the following, please note that the budget pricing above **does not** include the following:
 - i. Wood clad or custom ornamental gate fabrication and installation.
 - ii. Stamped concrete or commercial pavers for entry.
 - iii. RFID access or other commercial access control systems.
 - iv. Touch screen / VOIP guest entry phone.
2. Once final design and plans are complete and approved by the city our team will provide a fixed cost price for the entire construction and installation.
 - i. California Gate and Entry Systems has a "B" Construction License that allows us to act as general contractor for all aspects of the installation.
3. Please see attached document "Gating Your Community" for other information and considerations regarding the long term implications of maintaining an automated gated entry.

Thank you for the opportunity to provide you with an automated vehicle gate system and to inform you of the processes. Please feel free to contact us if you want to move forward with the project or if you have any questions or concerns.

Kind Regards,
Jim Squire