

Appendix D
Historical Resources Technical Report



MICHAEL WHITE ADOBE
HISTORICAL RESOURCES TECHNICAL REPORT

Prepared for
San Marino Unified School District

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TABLE OF CONTENTS

Introduction	1
Regulatory Setting.....	1
Federal	1
State	2
Local.....	3
Historic Context.....	4
Description of Subject Property.....	4
Exterior	5
Interior	5
Alterations	5
History	7
Michael White.....	7
Other owners.....	9
San Marino High School.....	9
Ranchos in Southern California.....	10
Adobe construction.....	13
Summary of Significance	14
Identification of character defining features	14
Integrity	15
Thresholds for Determining Significance of Impacts.....	15
Analysis of Potential Impacts	17
Demolition	17
Alternatives	20
No Project.....	20
Relocation and Stabilization at Lacy Park.....	20
Relocation and Stabilization at Huntington and Gainsborough Drives.....	23
Relocation and Stabilization by reconstruction.....	23
Relocation in situ or in place	24
Conclusion	25
Attachments	
Historic Photographs and other documentation (Figures 1-29)	
Contemporary Photographs (Figures 30-57)	
Maps and Aerial Photographs (Figures 58-67)	
Engineering drawings and Division of the State Architect policy (Figures 68-85)	

INTRODUCTION

The proposed project, which is the subject of an Environmental Impact Report (EIR), involves removal of the Michael White Adobe (subject property or “Adobe”) from the San Marino High School campus. The project site is located in the City of San Marino on the grounds of San Marino High School, which is situated on the north side of Huntington Drive between Winston Avenue on the west and Gainsborough Drive on the east. Immediately surrounding the subject property are athletic facilities, with an L-shaped swimming pool to the south and west, a baseball diamond to the east, and additional recreational facilities north of the adjacent access road.

The following report summarizes the history of subject property, highlighting its character-defining features with the goal of informing an analysis of impacts of removal of the Adobe. The report first establishes the regulatory setting, followed by a physical description of the subject property and review of its alterations. The next section describes the historical context of the subject property with a summary of significance. Finally, the report describes impacts of removal.

REGULATORY SETTING

The following evaluation establishes the regulatory setting, including a summary of national, state and local historical resource designations for the subject property.

National Register of Historic Resources (National Register)

The National Register is the nation’s official list of historic and cultural resources worthy of preservation. Authorized under the National Historic Preservation Act of 1966, as amended, the National Register is part of a national program to coordinate and support public and private efforts to identify, evaluate, and protect the country’s historic and archaeological resources. Properties listed in the National Register include districts, sites, buildings, structures, and objects that are significant in American history, architecture, archaeology, engineering, and culture. The National Register is administered by the National Park Service (NPS), which is part of the U.S. Department of the Interior.

As defined in National Register Bulletin #15, “How to Apply the National Register Criteria for Evaluation,” resources are eligible for the National Register if they:

- A) are associated with events that have made a significant contribution to the broad patterns of our history; or
- B) are associated with the lives of significant persons in or past; or
- C) embody the distinctive characteristics of a type, period, or method of construction, or that represent the work of a master, or that possess high artistic values, or that represent a significant and distinguishable entity whose components may lack individual distinction; or
- D) have yielded or may be likely to yield, information important in history or prehistory.”

Once a resource has been determined to satisfy one of the above-referenced criteria, then it must be assessed for “integrity.” Integrity refers to the ability of a property to convey its significance, and the degree to which the property retains the identity, including physical and visual attributes, for which it is significant under the four basic criteria. The National Register recognizes seven aspects or qualities of integrity: location, design, setting, materials,

workmanship, feeling, and association. To retain its historic integrity, a property must possess several, and usually most, of these aspects.

Relationship to Project

The subject property was previously surveyed in 1977 (**Figure 29**) and found to appear eligible for listing the National Register under criterion B for its association with Michael White. The property has sufficient integrity and continues to be National Register eligible for its association with White with the period of significance 1845-1878 for its relationship with an important person. While considered under criterion C for its adobe construction technique, the property does not appear to retain sufficient integrity of design, materials, workmanship and setting to be found eligible for architecture or construction technique. While the high probability that the Adobe site can yield important archaeological or subsurface information about the adobe construction technique and evidence of 19th century domestic use was considered for eligibility under criterion D, due to losses of integrity, principally of setting, the site does not appear eligible for archaeology or information potential. The property was considered for eligibility under criterion A as a rare and unique property type in the Los Angeles region. However, given the reasons noted above for architecture, the property does not appear National Register eligible under this criterion.

California Register of Historical Resources (California Register)

The California Register was established to serve as an authoritative guide to the state's significant historical and archaeological resources (PRC §5024.1). State law provides that in order for a property to be considered eligible for listing in the California Register, it must be found by the State Historical Resources Commission to be significant under any of the following four criteria; if the resource:

- 1) Is associated with events that have made a significant contribution to the broad patterns of California's history and cultural heritage.
- 2) Is associated with the lives of persons important in our past.
- 3) Embodies the distinctive characteristics of a type, period, region, or method of construction, or represents the work of an important creative individual or possesses high artistic values.
- 4) Has yielded, or may be likely to yield, information important in prehistory or history.

In addition to meeting one of the four above criteria, California Register-eligible properties must also retain sufficient integrity to convey historic significance. California Register regulations contained in Title 14, Chapter 11.5, §4852 (c), provide that "it is possible that historical resources may not retain sufficient integrity to meet the criteria for listing in the National Register, but they may still be eligible for listing in the California Register." The California Office of Historic Preservation (OHP) has consistently interpreted this to mean that a property eligible for listing in the California Register must retain "substantial" integrity.

The California Register also includes properties which: have been formally determined eligible for listing in, or are listed in the National Register of Historic Places (National Register); are registered State Historical Landmark Number 770, and all consecutively numbered landmarks above Number 770; points of historical interest, which have been reviewed and recommended to the State Historical Resources Commission for listing; and city and county-designated landmarks or districts (if criteria for designation are determined by OHP to be consistent with California Register criteria). PRC §5024.1 states:

- (g) A resource identified as significant in an historical resource survey may be listed in the California Register if the survey meets all of the following criteria:
- (1) The survey has been or will be included in the State Historical Resources Inventory.
 - (2) The survey and the survey documentation were prepared in accordance with [OHP]... procedures and requirements.
 - (3) The resource is evaluated and determined by the office to have a significance rating of category 1-5 on DPR [Department of Parks and Recreation] form 523.
 - (4) If the survey is five or more years old at the time of its nomination for inclusion in the California Register, the survey is updated to identify historical resources which have become eligible or ineligible due to changed circumstances or further documentation and those which have been demolished or altered in a manner that substantially diminishes the significance of the resource.

Relationship to Project

As the subject property has been previously surveyed and found to be eligible for listing in the National Register, it is also eligible for listing in the California Register under criterion 2 for its association with Michael White. The period of significant association with an important person is 1845-1878, when White lost the property in a sheriff's sale. Given that California Register-eligible properties need not retain National Register level integrity, the Adobe appears significant under criterion 2 as a rare and unique property type in the region and under criterion 3 for its archaic construction technique for the period 1845, its date of construction. The site of the Adobe also appears significant under criterion 4 for the information potential it may yield about archaic construction techniques and evidence of domestic life for period 1845- circa 1920s, when sewer systems became prevalent.

San Marino

The local register of historic resources as established under Section 2, Article 12 of the San Marino City Code adopted in March 1989, allows for City Council to "designate a building, landmark or other property within the City as a local historical landmark in special recognition of the property's role during the formation and existence of the City." Nomination is by petition of an individual or organization.

Relationship to Project

Designated in May 1989, the subject property is one of only two local historical landmarks in San Marino and was the first property to be identified as such.¹ San Marino City Council found the property to be significant as "one of the oldest buildings in San Marino still standing...[that] is referenced in the early history of San Marino and is a part of the City's historical culture."²

¹ The Armin Thurnher House, constructed in 1929 and located in Lacy Park, was designated a local historical landmark December 11, 2002.

² City of San Marino Resolution No. 1921, dated May 10, 1989.

HISTORIC CONTEXT

The following discussion of the history of the City of San Marino is adapted from a "A San Marino Overview" prepared by the San Marino Historical Society:³

The story of San Marino is a rich part of California's history. The site of San Marino once consisted of large fruit ranches and vineyards owned by early day pioneers whose names were known to all Californians, such as Benjamin Wilson, James DeBarth Shorb, L. J. Rose, Edward J. Kewen, and General George Stoneman. Although not as well known, Michael White, whose adobe home still stands on the high school campus, was the most enduring of the pioneers. The flag of Spain still flew over the Californias when the young English sailor arrived in 1817. He played a part in historical events through the Mexican period and well into American statehood.

In an earlier era, this area was part of the vast California mission system, providing rich yields of food, tallow, and hides. As the San Gabriel Mission grew, a need arose for a grist mill to process the grains. Such a mill was built about 1816 and is, today, our El Molino Viejo - the Old Mill - the oldest building in San Marino and a historic landmark of Southern California. San Marino's most famous resident was Benjamin D. Wilson, who, in 1854, established his Lake Vineyard Ranch home on what is now Euston Road. He lived there until his death in 1878. He once described the area as "one of the most beautiful places that heart could desire."

Serving as state Senator for two non-consecutive terms, Wilson often entertained important Southland visitors at his ranch. When Wilson's daughter Maria Jesus married James DeBarth Shorb, they received the top knoll of the estate as part of her inheritance. The Shorbs built a home where the Huntington mansion now stands, and named their 600 acre ranch "San Marino". Shorb chose the name after his grandfather's plantation in Maryland which, in turn, had been named for the tiny Republic of San Marino. Henry E. Huntington often visited the Shorb estate and loved the location. He purchased the Shorb property in 1903 and, in time, the old three story ranch house gave way to the Huntington mansion. Today, the City of San Marino is well-known throughout the world for the extensive and priceless collection of art treasures, plantings, books, and papers in the Huntington Library, Art Gallery, and Botanic Gardens. Wilson's daughter Ruth married George S. Patton, who not only became the first mayor of San Marino after incorporation in 1913, but was the father of another famous figure in world history – General George S. Patton, Jr.

DESCRIPTION OF SUBJECT PROPERTY

The Department of Parks and Recreation (DPR) 523 form prepared for the subject property prepared in 1977 describes it as:

Located in the northwest corner of the San Marino High School campus, the one-and-a-half story adobe has a wood shake roof, wood frames around the doors and windows and two chimneys.⁴

³ Peggy Winkler, "A San Marino Overview," *The Grapevine*, published by the San Marino Historical Society, Fall 1996.

Exterior

The subject property is an L-shaped adobe house sided with smooth stucco (**Figures 1-21, 30-41**). A one story wing is arranged in a north-south orientation (north wing), and a one-and-a-half story wing arranged in an east-west orientation (south wing). Clad in shingles, the gable roof has slightly overhanging eaves, which is fairly steep above the south wing and shallower along the north wing. Wood clapboard siding is arranged horizontally in the gable ends. Corredores (roof-covered porches) supported by two wood posts are placed along the east elevation of the north wing and an additional porch is located along the south elevation of the south wing. While two chimneys were present in 1977 when the DPR 523 form was prepared, there is currently only one chimney, centered in the south wing. Fenestration generally consists of wood frame and sash double hung windows with metal grates on the exterior. Wood doors are located along the east elevation of the north and south wings, as well as an additional door centered along the south elevation.

The building is surrounded on all sides by a steel fence. Yucca and other succulents line the east porch, while a Cyprus tree shades the north elevation. The porches are paved with brick. A swimming pool encircles the subject property on the west and south sides and is approximately ten-feet from it. Contained by a retaining wall, it is located approximately five-feet below the level of the adobe house. Bleachers for baseball spectators are located east of the building. North of the building is a paved access road

Interior

The interior of the adobe house is separated into three rooms, with one room in the north wing that retains evidence of a chimney along the east wall, and two rooms in the south wing that are separated by fireplace (**Figures 22-23, 42-57**). The connection between the north wing and the two rooms in the south wing is particularly wide. Typical of adobe construction, window and door openings reveal thick exterior wall dimensions. Floors are brick while walls are generally finished with smooth plaster. A wood panel is removed from the doorway connection between the north and south wings to reveal the adobe construction. Chair rails are present in the south wing. It should be noted that while the roof appears to provide a watertight assembly, there is evidence of rising damp or moisture penetration along the interior of the east elevation wall of the south wing (**Figures 54-55**).

Alterations

Although the Michael White Adobe has been altered many times since it was constructed in 1845, it retains substantial integrity from 1977 when it was found eligible for listing in the National Register for its association with an important person. Because there are not extant building or alteration permits, a description of alterations has been pieced together through review of historic photographs, aerial photographs, historic drawings, and extant historic fabric.

The 1977 DPR form states,

⁴ Pamela Lee Gray, Department of Parks and Recreation 523 form, "Miguel Blanco Adobe," prepared July 1977.

The numerous alterations include exterior wiring for electricity, addition of wire cages covering the windows and doors, and addition of several windows. White stucco now covers the original adobe foundation. K.L. Carver restored the residence in 1953 but the interior and exterior have since been vandalized.

Earliest historic photographs from 1936 taken as part of the Historic American Building Survey (HABS) show the adobe house with a two-story addition (**Figures 1-4**). Historic photos also show a lean-to along the north elevation of the south wing accessed from the east by double doors as well as the porch along the east elevation enclosed (used for parking). It is estimated the wood frame addition was constructed between 1865 and 1880,⁵ by Michael White to house his growing family of thirteen children.⁶ The subject property was located at the time in a rural landscape with no other buildings evident. The Adobe is surrounded by mature trees and a dirt road runs along the east elevation. An aerial photograph from 1928 shows the Adobe set far back from Huntington Drive surrounded by citrus groves (**Figure 58**). A 1930 Sanborn Fire Insurance map also shows two ancillary buildings, not readily visible in the aerial photograph (**Figure 59**). A 1938 aerial photograph shows the groves replaced by fields while residential neighborhoods began to develop to west of Gainsborough Drive and south of Huntington Drive (**Figure 60**).

The two-story, wood frame addition was removed around 1947 when Tony Garcia, who worked for the San Marino School District's maintenance department and resided at the property from 1942-1947, moved the two-story wood frame addition to 704 El Monte Avenue, where he reconstructed it as a two-story duplex.⁷ Photos from circa 1947 show the Adobe with the wood frame two-story addition removed, while the lean-to is still evident (**Figures 8-10**). Although there is some evidence of deterioration of whitewashed mud over the adobe walls on the west elevation, the house appears to be in relatively good condition in these photographs. A site plan from 1947 shows proposed removal of ancillary buildings. An aerial photograph from 1949 shows a school complex facing Huntington Drive while the Adobe is evident behind (**Figures 61**). The adobe house appears to be surrounded by trees and open space in this photo with dense residential development on all sides.

In contrast, photographs from 1952 show large areas of deterioration with significant portions of the roof missing in the south wing (**Figures 11-16**). It is possible the Adobe suffered damage due to the July 1952 Tehachapi earthquake. The lean-to has been removed in these photographs, as well as the enclosure around porch along the east elevation. In addition, door leaves and window sash have been removed.

A "restoration" of the Adobe began in 1952 was completed in 1956, which brought the building back to "exactly as it was when the swashbuckling White – soldier and sailor of fortune, gold-seeker, reluctant gun fighter and father of 13 – lived there"⁸ (**Figure 17**).

⁵ Henry F. Withey, Historic American Building Survey, "La Casas de Miguel Blanco," March 1, 1937.

⁶ Midge Sherwood, *San Marino; From Ranch to City* (San Marino Historical Society, 1977), 25. Only nine of his 13 children survived passed childhood. (Michael C. White, Written by Thomas Savage, *California all the Way Back to 1828*; Early California Travels Series XXXII, Bancroft Library, 1877)

⁷ Laura Bee Eckert, "Historic Home Made into Paying Proposition," *Pasadena Star News*, July 16, 1950. Interestingly, the two-story wood frame addition is still evident in the Sanborn Fire Insurance maps dated 1950. Its presence in 1950 is not supported by photographic or other documentary evidence.

⁸ "Adobe will preserve San Marino Memories," *Los Angeles Times*, January 11, 1952, page 19.

An aerial photograph from 1953 shows grading in progress on all of the land surrounding the Adobe and school (**Figure 63**). A 1952 site plan shows the Adobe, identified as “existing historical monument,” with proposed boys and girls gyms to the west and south. A 1953 site plan shows proposed pools.

Undated photos after the 1952-1956 restoration shows the Adobe with reconstructed porches, new windows and doors including window grates, new roof, new brick paving on the exterior and interior, cement plaster cladding, and plantings along the north wing. Although a chimney is evident at the north wing in these photographs, it is no longer extant. A plaque on a pedestal was added southeast of the adobe in 1956. By 1959, the area immediately surrounding the adobe was fenced on the west and south with chain link above retraining walls enclosing the pool (**Figures 18-20**). At an undetermined date, a fence with steel pickets on the north and east adjacent to walkways leading to athletic fields was added to fully enclose the Adobe. There do not appear to have been any alterations since the Adobe was surveyed as appearing eligible for listing in the National Register in 1977 or since it was designated local historical landmark in 1989.

HISTORY

The 1977 DPR form states,

Michael Clarrington White, called Miguel Blanco in California, was born in England and came to California in 1829. He was an accomplished sailor who served in that capacity as well as a mail courier for the Mexican government of California in the mid 1830's. In 1831, White married Maria del Rosario, daughter of Doña Eulalia de Giullen, a politically powerful woman in Southern California. White was granted land from the Mexican government in 1843 and built his adobe several years later. An orchard and vineyard were also located on the property. Later owners included L.H. Titus and James Ford. San Marino High School has been built around the original structure.

Michael White (1802 – 1885)

As a participant and witness to the early history of Los Angeles, Michael White's Adobe house continues to appear eligible for listing in the National Register under criterion B for this association. When he was 76, Michael White (also known as Miguel Blanco) gave an oral history to Thomas Savage for the Bancroft Library in 1877.⁹ Thomas Savage wrote in his introduction that he found Michael White to be

genial and obliging, willing to impart what he knew. It is evident that he is a man who gave but little of his attention to politics, and would take no part in civil strife...Mr. White is in very feeble health; his hand is extremely shaky, his memory seems to be quite fresh, and I am led to believe...that he is a truthful

⁹ “San Marino Adobe Recalls Lore of Michael White, Soldier of Fortune,” *Los Angeles Times*, February 19, 1956, page F9.

⁹ The oral history of Michael C. White is one of approximately 125 dictations undertaken by Bancroft of important figures within the Californio community. These "Bancroft Dictations" (also known as "Testimonios" or "Recuerdos") provide an important counter narrative to traditional histories. The Bancroft Library, <<http://bancroft.berkeley.edu/collections/westernamericana.html>>, site accessed December 11, 2008. Although only 300 copies of the book have been published, the complete text is available at <<http://webroots.org/library/usahist/catwb000.html>>.

man, a man who means always to speak the truth.¹⁰

In the oral history, Michael White tells the colorful narrative of his life chronologically. Born in Kent, England in 1801, he was apprenticed to a whaling ship in 1814, arriving in Baja California in 1817. His sailing adventures continued along the Alta and Baja California coast, as well as to the Sandwich Islands (Hawaiian Islands), interspersed with overseeing construction of boats in Santa Barbara and San Pedro around 1828.¹¹

It was likely during construction of the schooner Guadalupe in San Pedro for the Mission San Gabriel in 1830 that he met his wife Maria del Rosario Guillen. They were married in 1831 at Mission San Gabriel and he promptly left for Mazatlan, Mexico. Daughter of the famous centenarian Doña Eulalia Perez de Guillen, who lived until 1878 to be over 100 years old and was known as “Mother Superior” of San Gabriel mission and “keeper of the keys,” White’s marriage appears quite strategic. By this point, Michael White had become a Mexican citizen, correspondingly changing his name to Miguel Blanco to reflect his new citizenship.¹² Returning from Mazatlan, White and his family settled at Rancho Los Nietos.¹³ His first child of thirteen (13) was born soon thereafter.¹⁴

In 1836, while White was still living at Rancho Los Nietos, Judge Jose Sepulveda tried to convince him to fight in a skirmish in San Diego. Declining, White replied, “Yes, I am a citizen of Mexico, but not a citizen of revolutions.”¹⁵ This attitude against aggression was one he took throughout the turbulent years leading up to the Treaty of Guadalupe in 1848 and American control of California, although he reluctantly participated in the Battle of Cahuenga in a company led by William Workman in late February 1845 that overthrew Micheltorena as well as the Battle of Chino in a raid led by Benjamin Wilson in September 1846. Loyal to his English ancestors and Mexican citizenship, White felt “that the Americans have treated him badly; he accuses Americans of having swindled him out of lands and robbed him of other property...All this misfortune he lays at the door of Americans, their authorities, and laws.”¹⁶

In 1839, White traveled to New Mexico with 50 horses and mules, ending up in Taos, where he sold his livestock.¹⁷ Two years later, he returned to California with the renowned Rowland and Workman Party, which also included Benjamin Wilson, who became a close friend and neighbor of White.

While Rowland and Workman were together granted 48,000 acres of Rancho La Puente, in 1843, White had his first foray as a landholder when he was granted Rancho Muscupiabe in the Cajon Pass in San Bernardino by Mexican Governor Micheltorena. At the confluence of several overland routes, White lasted only one year on the land and quickly abandoned it as indefensible.

In 1845, he was granted 500 *varas* (or approximately 75 acres) from the new Mexican Governor

¹⁰ Michael C. White, Written by Thomas Savage, *California all the Way Back to 1828*; Early California Travels Series XXXII, Bancroft Library, 1877, 15-16.

¹¹ White, 15-32.

¹¹ John R. Kielbasa, *Historic Adobes of Los Angeles County*, (Pittsburgh: Dorrance Publishing Co., Inc, 1977), 210.

¹³ White, 33.

¹⁴ 1850 United States Census, Los Angeles County, sheet 32.

¹⁵ White, 35.

¹⁶ White, 15.

¹⁷ White, 43-46; Kielbasa, 210

Pio Pico and called his ranch San Isidro (or San Ysidro) where he constructed the subject property and later the two-story wood frame addition. It is possible he received his ranch in connection with his service to Mission San Gabriel or for his role in construction of the schooner Guadalupe or, as others suggest, as Doña Eulalia's son-in-law.¹⁸ White planted a vineyard and orchards containing a variety of fruit trees on his ranch and permanently settled down from his adventures. White's rancho was a sliver between the vast ranchos of San Pasqual, which was nearly 14,000 acres, later purchased by Wilson, and the Santa Anita ranch, which was 13,319 acres owned by Hugo Reid, and later made famous as the "Arcadia" of E.J. "Lucky" Baldwin.¹⁹

White parceled off portions of his rancho to his children as they had their own families. Notably, one daughter married Francisco Alvarado, brother of Mexican Governor Jose Alvarado²⁰ while another daughter married Joseph Heslop (Jose Eslope). In 1878, White lost his ranch to L.H. Titus in a sheriff's sale. To save the ranch, his mother-in-law, Dona Eulalia considered joining the Barnum circus as the oldest woman in the world, but she died the same year.²¹ He purchased a \$2000 cottage in Los Angeles which burned down the same year.²² Until his death in 1885, White lived with his children.

Other Owners of Subject Property

Luther Harvey Titus (1822 – 1900), who owned adjoining property, came to California in 1869. He grew oranges on his 65 acres, selling his land in 1887 for \$15,000.²³ The property was allegedly sold to the San Francisco silver baron James C. Flood (1826-1889),²⁴ and was later owned by Governor Henry Harrison Markham (1840-1923) and Louis Leonard Bradbury (b. 1823) who gained on-going fame through his development of the Bradbury Building in downtown Los Angeles. The property was deeded to Isaac Newton Van Nuys (1836-1912) by 1899.²⁵ Given extensive land holdings of these prominent men and well-known residences, there is no evidence that any of them or their families lived at the property.

San Marino High School

The first school in San Marino opened in 1918 with 58 students at a site on Huntington Drive between Virginia and West drives. School enrollment grew over 600% between 1917 and 1928 causing the school board to purchase a site for another elementary school at the intersection of Huntington Drive and Granada Avenue, as well as a site that would become San Marino High School. In 1928, 18 acres of White's former ranch property was purchased by the San Marino School District, which leased it as a flower and vegetable farm to a Japanese family. When the

¹⁸ Kielbasa, 210.

¹⁹ Midge Sherwood, "Michael White: Sailor, Adventurer, Rancher," pamphlet published by the San Marino Historical Society, April 1983. Lucky Baldwin bred race horses on his rancho, a portion of which later became Santa Anita Park.

²⁰ Kielbasa, 210.

²¹ Doña Eulalia was also invited by the Philadelphia committee for the United States Centennial observance to go on exhibit as oldest living woman in the country as the Centennial celebration. According to Mission records, she was 138 years old (which would have meant she gave birth to her youngest daughter Maria in her 70s). At the thought of her mother being a "sideshow," Maria del Rosario Guillian, married to Michael White, was so upset, she took her mother to court to get a judge to prohibit it. (Midge Sherwood, *Days of Vintage, Years of Vision* (San Marino, CA: 1982) 391.)

²² Midge Sherwood, "Michael White: Sailor, Adventurer, Rancher," pamphlet published by the San Marino Historical Society, April 1983.

²³ *An Illustrated Historic of Southern California: Embracing the Counties of San Diego, San Bernardino, Los Angeles and Orange, and the Peninsula of Lower California from the Earliest Period of Occupancy to the Present Time* (Chicago: The Lewis Publishing Company, 1890) 766-768.

²⁴ Kielbasa, 210

²⁵ San Marino Historical Society, unpublished manuscript, 7.

Japanese family was interred during World War II,²⁶ the subject property was occupied by Tony Garcia, who worked in the maintenance department of the San Marino School District.

Although the intention of purchasing the 18 acres was as a future high school, the site was initially used for Carver Elementary School, named for K.L Carver and constructed in 1947 with school buildings bordering on Huntington Drive. Kauffman L. Carver (1888–1971)²⁷ served on the school board for 19 years, with 13 of those as president.

Until 1921 when South Pasadena and San Marino formed a new school district, San Marino students attended high school in adjacent cities. In 1952, after heated debate and a City-wide election, it was decided to separate from South Pasadena and form a separate San Marino High School. Carver Elementary School was converted and expanded to accommodate the high school in 1952, with a new elementary school located on San Gabriel Boulevard²⁸ San Marino High School appears to have opened at the subject property by 1955 and by 1959, the adobe was surrounded on west and south by the high school swimming pool and on the north and east by athletic fields. The San Marino Unified School District was formed in 1957.²⁹

A longtime San Marino resident, Carver spearheaded preservation of the Adobe. “It was planned at that time, 1952, that the house would become an integral part of the community used partly as an historical site and partly as a meeting place for campus organizations.”³⁰ After the 1952-1956 restoration, the Adobe was used briefly as a historical museum exhibiting Indian collections of Aileen White and Laurie Coleman, as well as miscellaneous artifacts donated by Collis H. Holladay.³¹ By 1972, the Adobe was known as the “Pep Adobe” and used by the Pep Squad for storage. The bronze marker was placed by the Native Sons and Daughters of the Golden West after the restoration.³²

Ranchos in Southern California

The following chart identifies the 35 extant adobes in Los Angeles County described in *Historic Adobes of Los Angeles County* by John Kielbasa, published in 1997 and an additional four adobes identified from further research. A corresponding map is included as **Figure 67**.

Five other adobe houses are located in the vicinity of the Michael White Adobe. The San Gabriel Adobes were associated with the San Gabriel Mission, the “social, economic and religious center of Southern California.”³³ The recently restored Hart Adobe is located in Sierra Madre and was constructed by John Jacob Hart. The substantially altered Hermitage Adobe was constructed for James Craig. The Flores Adobe, was so called for General Jose Maria Flores who led the Mexican Army of California during Mexican War and retreated to this site. The Flores Adobe was constructed by Juan Perez, a cousin of Dona Eulalia, on Rancho San Pasqual, which she is credited for opening to settlement.³⁴ Finally, the Hugo Reid Adobe in was located on the adjoining Santa Anita rancho.

²⁶ San Marino Historical Society, unpublished manuscript, 7.

²⁷ California Death Index, <<http://vitals.rootsweb.ancestry.com/ca/death/search.cgi>>, site accessed January 15, 2009.

²⁸ Midge Sherwood, *San Marino; From Ranch to City* (San Marino: San Marino Historical Society, 1977) 18-19.

²⁹ *50th Anniversary of San Marino, 1913-1963*, (San Marino : Turner & Stevens, 1963), 13.

³⁰ San Marino Historical Society, unpublished manuscript, 7.

³¹ Midge Sherwood, *San Marino; From Ranch to City* (San Marino Historical Society, 1977), 26.

³² San Marino Historical Society, unpublished manuscript, 7.

³³ Kielbasa, 214.

³⁴ Midge Sherwood, *Days of Vintage, Years of Vision* (San Marino, CA: 1982), 467.

	Name	Location	City	Use	Year Built
1	Pico Adobe (Ranchito Romulo)	10940 Sepulveda Boulevard	Mission Hills	Closed, earthquake damage	1834
2	Lopez Adobe	1100 Pico Street	San Fernando	Museum	1883
3	Rancho Los Encinos (De la Osa Adobe)	16756 Moorpark Street	Encino	Closed, earthquake damage	1849
4	Miguel Leonis Adobe	23537 Calabasas Road	Calabasas	Historical Museum	1846
5	Reyes Adobe	Reyes Adobe Road at Rainbow Crest Drive	Agoura Hills	Closed, city plans to restore and turn site into historical museum	1797-1820
6	Sepulveda Adobe	Mulholland Highway at Las Virgenes Canyon Road	Malibu Creek State Park	Abandoned	1860s
7	Catalina Verdugo Adobe	2211 Bonita Avenue	Glendale	Park ranger HQ for Glendale Rec and Parks, plan to turn into museum	1860-65
8	La Casa Adobe de San Rafael	1330 Dorothy Drive	Glendale	Owned by city, open to public 2 days/week	1872-75
9	Rancho La Liebre Adobe	Tejon Ranch Company, State Route 138	10 mi. e. of Gorman	Private land, not open to public	late 1850s
10	La Casa de Miguel Ortiz	13980 Elizabeth Lake Road	Elizabeth Lake	Private residence, not open to public	
11	Avila Adobe	10 E. Olvera Street	Los Angeles	Available for tours	1818
12	Rancho Los Feliz Adobe	Griffith Park, 4730 Crystal Springs Drive	Los Angeles	HQ for park rangers, Griffith Park	
13	Rancho La Brea Adobe (Gilmore Adobe)	6333 W. 3rd Street	Los Angeles	Private office	1828-1830
14	Rocha Adobe	2400 Shenandoah Street	Los Angeles	Private residence	1865
15	Rancho La Cienega O'Paso de La Tijera	3725 Don Felipe Drive	Los Angeles	Private offices	late 1770s

	Name	Location	City	Use	Year Built
16	The Centinela Adobe	7634 Midfield Avenue	Los Angeles	Houses local artifacts, open to public	1834
17	Rancho San Pedro (Dominguez Ranch Adobe)	18127 Alameda Street	Compton	Museum, open to public	1827
18	Rancho Los Cerritos Adobe	4600 Virginia Road	Long Beach	Museum and library, open to public	1844
19	Rancho Los Alamitos Adobe	6400 Bixby Hill Road	Long Beach	Adobe and gardens open to public as a museum	1806
20	Juan Matias Sanchez Adobe	946 Adobe Avenue	Montebello	open to public for guided tours	1845
21	Flores Adobe	1804 Foothill Street	South Pasadena	Private residence	1839
22	Michael White Adobe	2701 Huntington Drive	San Marino	Private property, on school site	1845
23	San Gabriel Adobes	315 Orange Street	San Gabriel	Private residence	early 1770s
24	Hugo Reid Adobe	Los Angeles State and County Arboretum, 601 Baldwin Avenue	Arcadia	Interior not open but viewable through windows; Part of LA State and County Arboretum in Arcadia	1839
25	Pio Pico Mansion	6003 Whittier Blvd.	Whittier	Museum, open to public	1852
26	William Workman Adobe	15415 East Don Julian Road	City of Industry	Major alterations,	1842
27	William R. Rowland Ranch House	Lemon Creek Park, 130 Avenida Alipaz	Walnut	By appointment only	1850
28	La Casa Primera	1569 N. Park Avenue	Pomona	Museum, open to public	1837
29	La Casa Alvarado	1459 Old Settlers Lane	Pomona	Private residence	1840
30	Adobe de Palomares (La Casa Madera)	491 E. Arrow Highway	Pomona	Open to public	1850-54
31	La Casa de Carrion	919 Puddingstone Drive	La Verne	Private residence	1864

	Name	Location	City	Use	Year Built
32	Gage Home (Casa de Rancho San Antonio)	7000 East Gage Avenue	Bell Gardens	Private residence and office	1840
33	Shadow Ranch	22633 Vanowen Street	Canoga Park	Park community center	1869-1872
34	Hermitage Adobe	2121 Monte Vista Street	Pasadena	Private residence	1869
35	Hart Abode	Memorial Park, 222 W. Sierra Madre Boulevard	Sierra Madre	Property is known as Memorial Park, serves as grounds of Sierra Madre City Hall	1885
36	Mitchell Schoolhouse Adobe	24151 San Fernando Road	Santa Clarita	Museum, City Point of Historical Interest	1860s
37	Ortega-Vigare Adobe	616 S Ramona Street	San Gabriel	Private residence	1792-1805
38	El Molino Viejo	1120 Old Mill Road	San Marino	Museum	1816
39	Hawks Adobe	37 E. Montecito	Sierra Madre	Retail business	1895

Adobe construction

The predominant mode of construction prior to the population boom of the 1880s was adobe. The benefits of adobe construction include climatic considerations. As a slow conductor of heat, adobe structures maintained a stable interior temperature despite wide climate fluctuations.³⁵ Adobe structures were relatively small and consisted of only a few rooms, usually rectangular in plan, but less commonly L-, U-, or H-shaped. Ideally, adobe structures were constructed on high ground near a fresh water source. Stones cleared from the site were often used in the foundation. Made from readily available materials, adobe bricks were composed from mixture of water, earth, and clay found near the home site combined with straw or horse hair and sand to hold the mixture together. The wet mud-like substance was then poured into rectangular wood frames, typically eighteen inches by twenty four inches, and formed into bricks that were spread out and allowed to partially dry. At that point, the frames were removed, leaving the adobe brick to completely dry in the sun.

When the bricks were dry they were stacked on the foundation to create thick walls and held together with a mud mixed with sand. Traditionally, Southern California adobes were single-story buildings. By the mid-1800s, larger, more elaborate adobes and two-story adobe started to appear. Primitive adobes houses had thatched roofs made from tree-branches or *tules*

³⁵ Thomas T. Eyre, "The Physical Properties of Adobe Used As a Building Material," *The University of New Mexico Bulletin Engineering Series* 1, no. 3 (Albuquerque: University of New Mexico Bulletin, 1935) 3.

(swamp rushes) found near rivers or streams. Later roofs were made from wood beams and planks. Brea was used to caulk the space between the planks. Generally roofs were flat. However, in the 1860s, adobes began adopting gabled roofs covered with wood shake.³⁶ Although interior floors were initially packed earth, they were later lined with clay tile. Plaster was applied to walls. While this form of construction is generally quite durable, heavy rains can easily melt the walls without sufficient protection.

SUMMARY OF SIGNIFICANCE

The Michael White Adobe was previously assessed in 1977 and found to be eligible for listing in the National Register under criterion B for its association with Michael White. This report confirms that finding of significance and eligibility. As evidenced by his oral history in 1877, Michael White was witness and participant to events pivotal to the development of Los Angeles County and Southern California. Constructing and residing at the property for 33 years, from 1845 until 1878, the subject property is the only extant property directly associated with Michael White. As the property is National Register eligible under criterion B, it is also California Register eligible under criterion 2 for the period 1845-1878, when White lost the property in a sheriff's sale.

The subject property is eligible for listing in the California Register under criterion 1 for its rare and unique property type as one of 39 remaining adobe houses in Los Angeles County. With only 39 examples, some of which are significantly altered, extant adobe structures are an increasingly rare and important building type. The Adobe is also California Register eligible for its method of construction under criterion 3. The period of significance for eligibility under criteria 1 and 3 is 1845, the construction date. Despite alterations, the subject property continues to express its adobe construction through its form, thick walls and deep openings.

While National Register eligibility under criterion A and C was considered, given losses of design, materials, workmanship and setting, the property was found to only meet California Register integrity standards which allow for some loss of integrity.

The subject property was designated a local historical landmark as one of the oldest buildings in San Marino. The only other building from this period is the Old Mill. This significance corresponds with National and California register criterion A/1, "associated with events that have made a significant contribution to the broad patterns of our history." This presumptive significance aligns with application of California Register criterion 1 noted above.

Due to the age of the subject property and the length of residency by Michael White and his family, there is the potential that the property could be eligible under criterion 4 for its ability to yield information important in history, specifically the adobe foundations as evidence of archaic construction technique or household artifacts as evidence of 19th century domestic use. Additional research by a Register of Professional Archaeologists (RPA)-certified historic archaeologist would be required to document this significance, however given the high probability the site would yield significant information potential, it is found California Register eligible under criterion 4 for historic archaeology with a period of significance of 1845-circa 1920s, when sewer systems became prevalent.

IDENTIFICATION OF CHARACTER DEFINING FEATURES

Based on alterations to the subject property described in detail above, it appears that character

³⁶ Kielbasa, viii.

defining features are limited to the adobe walls. All other features appear to have been replaced or restored during the 1952-1956 restoration. Although some time has passed (53 years) since the restoration, none of the alterations appear to have taken on significance as they do not date from the period of significance when Michael White and his family resided at the subject property (1845–1878).

INTEGRITY

In addition to meeting one of the four criteria of the National or California Registers, properties must also retain sufficient integrity to convey its historic significance. A property either retains its integrity, the physical and visual characteristics necessary to convey its significance, or it does not. The seven aspects of integrity are: location, design, setting, materials, workmanship, feeling and association. To retain its historic integrity, a property must possess several, and usually most, of these aspects.

The subject property retains its integrity of *location*, as it has not been moved. In addition, the subject property retains its integrity of *design*. As seen in historic photographs, the existing form, plan, space, structure, and style of the subject property reflects its earlier period. Its integrity of *setting* (defined in part as relationships between buildings and other features, or open space), has been significantly compromised by surrounding athletic facilities, specifically construction of a swimming pool on two sides. Construction of the school and facilities obliterated any sense of an earlier rural setting of vineyards or orchards. The subject property generally retains its integrity of *materials*. It's most important material, adobe brick, is still evident in interpretive panels as well as in the deep openings for windows and doors. As the adobe construction is still evident, the subject property also generally retains integrity of *workmanship*, or evidence of artisans' labor and skill in constructing or altering a building.

Despite the loss of setting, the subject property's *feeling*, or presence of physical features that, taken together, convey the property's original character, is still present. For its integrity of *association* to be retained, the property must be sufficiently intact to convey its earlier relationships to an observer. Comparing it with historic photographs, subject property appears to retain sufficient integrity of association.

Although there have been substantial physical alterations to the subject property since it was constructed, it appears to retain sufficient integrity to convey its significance and appears to retain its general form and structure from its period of significance.

THRESHOLDS FOR DETERMINING SIGNIFICANCE OF IMPACTS

Background

According to CEQA Guidelines, a project would result in a significant impact to historical resources if it would cause a *substantial adverse change* in the significance of an historical resource is a project that may have a significant effect on the environment as defined in §15064.5(b).

A substantial adverse change is defined in CEQA Guidelines §15064.5(4)(b)(1), as "physical demolition, destruction, relocation, or alteration of the resource or its immediate surroundings such that the *significance of an historical resource would be materially impaired.*" The significance of an historical resource is materially impaired, according to CEQA Guidelines §15064.5(4)(b)(2), when a project:

- (A) Demolishes or materially alters in an adverse manner those physical characteristics of an historical resource that convey its historical significance and that justify its inclusion in, or eligibility for, inclusion in the California Register of Historical Resources; or
- (B) Demolishes or materially alters in an adverse manner those physical characteristics that account for its inclusion in a local register of historical resources pursuant to §5020.1(k) of the Public Resources Code or its identification in an historical resources survey meeting the requirements of §5024.1(g) of the Public Resources Code, unless the public agency reviewing the effects of the project establishes by a preponderance of the evidence that the resource is not historically or culturally significant; or
- (C) Demolishes or materially alters in an adverse manner those physical characteristics of an historical resource that convey its historical significance and that justify its eligibility for inclusion in the California Register of Historical Resources as determined by a lead agency for purposes of CEQA.³⁷

Examples of substantial adverse change include, but are not limited to, the following:³⁸

Changes to the Resource

- Physical destruction of, or damage to, all or part of an historical resource;
- Alteration of an historical resource, including restoration, rehabilitation, repair, maintenance, stabilization, hazardous material remediation, and provision of handicapped access that is not consistent with the *Secretary's Standards* (36 CFR part 68) and applicable guidelines or technical advisories, where appropriate;³⁹
- Relocation of an historical resource from its historic location in a manner that is not consistent with the *Secretary's Standards* (36 CFR part 68) and applicable guidelines or technical advisories, where appropriate;⁴⁰
- Change of the use that contribute to its historic significance;
- Neglect of an historical resource, which causes its deterioration, except where such neglect and deterioration are recognized qualities of a property of religious and cultural significance to an Indian tribe or Native Hawaiian organization; and
- Transfer, lease, or sale of property without adequate and legally enforceable restrictions or conditions to ensure long-term preservation of the property's historic significance.

Changes to the Immediate Surroundings of the Resource

- Change of the character of physical features within the historical resource's setting that contribute to its historic significance;
- Introduction of visual, atmospheric or audible elements that diminish the integrity of an historical resource's significant historic features;

CEQA Guidelines also specify a means of evaluating the relative significance of project impacts on historical resources. CEQA Guidelines §15064.5(b)(3) state:

³⁷ §15064.5(4)(b)(2). Emphasis added.

³⁸ These examples were taken from 36 CFR 800.5(2) of Section 106 Regulations.

³⁹ Including John Obed Curtis, *Moving Historic Buildings* (Washington, D.C.: U.S. Department of the Interior, 1979).

⁴⁰ John Obed Curtis, *Moving Historic Buildings*.

Generally, a project that follows the *Secretary of the Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring, and Reconstructing Historic Buildings* or the *Secretary of the Interior's Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings* (*Secretary's Standards*, Weeks and Grimmer, 1995), shall be considered as mitigated to a level of less than a significant impact on the historical resource.⁴¹

Compliance with the *Secretary's Standards* indicates that a project may have a less than significant impact on an historical resource. The converse of this does not hold; that is, failure to comply with the *Secretary's Standards* is not, by definition, a significant impact under CEQA. CEQA recognizes that alterations that are not consistent with the *Secretary's Standards* may still not result in significant impacts to the historical resource. Therefore, the significance of project impacts on an historical resource can be evaluated by determining:

- Whether a project is in conformance with the *Secretary's Standards* (less than significant impact);
- Whether a project is in substantial conformance with the *Secretary's Standards* and does not result in material impairment (less than significant impact);
- Or whether a project is not in conformance with the *Secretary's Standards* and results in material impairment (significant impact).

Criteria for Determining Significant Impacts

For purposes of this analysis, the following are thresholds for determining if the project will result in a significant impact:

1. It results in alteration of an historical resource that is not in conformance with the *Secretary's Standards* and results in material impairment of the resource.
2. It results in a change of the character of the historical resource's setting, through the introduction of visual, atmospheric or audible elements that are not in conformance with the *Secretary's Standards*, and results in material impairment of the resource's setting.

ANALYSIS OF POTENTIAL IMPACTS

The proposed project involves removal of the Michael White Adobe from the campus of the San Marino High School by demolition.

Demolition

Demolition of the Michael White Adobe would be accomplished by removing and disposing of the steel picket fence to the north and east, removing landscape plantings, demolishing both the north and south wings of the house including roof, wall and chimney structures, removing concrete and brick flatwork within the fenced area and brick floors inside the Adobe. Utilities would be capped and removed at the line of existing fencing. The existing plaque on pedestal from 1956 would be retained *in situ* or in place in the demolition scenario. Demolition of the former adobe would remove approximately six inches of the top surface of soil in order to provide for paving with asphalt or concrete with adequate drainage flow. No drawings were prepared for the demolition, however a description of the work was provided by contractor C.A.C. Construction, Inc. in a proposal dated July 7, 2009. No civil engineering drawings were

⁴¹ §15604.5(b)(3).

provided to document asphalt or concrete flatwork necessary to cap the former site of the adobe.

Demolition of the adobe would materially impair the qualities that make the historical resource significant and render it ineligible for listing in the National and California Registers. Demolition activities would also disturb the soil surface surrounding and beneath the building and likely harm potentially significant subsurface cultural resources including archaic construction techniques such as may be found in the foundation, footing, or other materials bearing on native soil that support the adobe walls. In addition, evidence of domestic use may be disturbed. Thus, demolition would be a significant impact to both historical and cultural resources under CEQA.

Mitigation measures

The following mitigation measure for documentation will reduce but not eliminate significant historical resources impacts of demolition.

Mitigation Measure for Documentation

San Marino Unified School District shall engage a professional architectural photographer and an architectural historian meeting the Secretary of the Interior's Professional Qualifications Standards (Architectural Historian) to implement Historic American Building Survey (HABS) Level II documentation of the current status of the adobe and its setting consisting of both photographs and a written narrative. The Architectural Historian shall direct the photographer to take images that duplicate views shown in the 1936 HABS documentation as well additional views. No less than 15 photographs shall be used to document the current status of the adobe and its setting. The photographs shall be large format, 4-inch by 5-inch, black and white negatives (two sets), contact prints (one set) and 8-inch by 10-inch prints (two sets). All shall be archivally processed and prints shall be made on fiber-based paper. Two original negatives shall be made at the time the photographs are taken. One set of negatives shall travel with set of contact prints to the National Park Service for entry into the HABS collection in the Library of Congress; the second set of negatives shall be transmitted to the San Marino Public Library along with one set of 8-inch by 10-inch prints. A second set of 8-inch by 10-inch prints shall be transmitted to the San Marino Historical Society. The written narrative shall reformat the information contained in this assessment and be transmitted to all the repositories named. Photocopies of the previous HABS documentation including drawings and photographs prepared in 1936 shall be transmitted to both the San Marino Public Library and San Marino Historical Society along with the contemporary work. The draft documentation shall be assembled by the Architectural Historian and submitted to the District Superintendent or designee for review and approval prior to submittal to the repositories. The District Superintendent or designee shall accept the final documentation prior to work on the Adobe site.

As provided in CEQA Guidelines §15126.4(b)(2), documentation will not reduce significant direct impacts of demolition of the Adobe to a less than significant level. Therefore, demolition of the Adobe will constitute a substantial adverse change in significance of an historical resource, and potential impacts to the historical resource shall not be mitigated to a less than significant level.

The following mitigation measure will reduce archaeological impacts to a level of less than significant.

Mitigation Measure for Archaeology

San Marino Unified School District shall engage a Register of Professional Archaeologists (RPA) certified archaeologist (Archaeologist) to prepare a predictive archaeological model and treatment plan, including a monitoring program. The treatment plan shall include a plan for recovery of significant information including documentation of any foundations, footings or other subsurface evidence of adobe construction and 19th and early 20th century domestic use. The Archaeologist shall implement the treatment plan by monitoring construction activities on the Adobe site at all times that ground disturbing work is under way. Artifacts recovered from the Adobe site shall be made available to local repositories including the San Marino Historical Society, Old Mill Foundation and Huntington Library, however the recovered artifacts may be disposed of if no local repository is willing or able to accept them. The draft predictive archaeological model and treatment plan shall be assembled by the Archaeologist and submitted to the District Superintendent or designee for review and approval and the District Superintendent or designee shall accept the final predictive archaeological model and treatment plan prior to work on the Adobe site. The final report documenting information and artifact recovery shall be submitted to the District Superintendent or designee for review and approval and when approved, shall be transmitted to the South Central Coastal Information Center at California State University, Fullerton for entry into the records of the California Historical Resources Information System (CHRIS).

Recovery of the scientifically consequential information will reduce significant impacts of demolition of archaeological or cultural resources to a less than significant level. Therefore, demolition of the Adobe with application of the Mitigation Measure for Archaeology will not constitute a substantial adverse change in significance of a cultural resource, and potential cultural resources impacts shall be mitigated to a less than significant level.

The following recommendation is made to address personal property at the Adobe site.

Recommendation for Salvage

The period furnishings, ephemera and other personal property contained within the Adobe appear to be the property of the San Marino Historical Society and shall be returned to the owner or set aside prior to commencement of any construction activity, including demolition and site preparation, on the property.

As none of the personal property was identified as a historical or cultural resource, this is only a recommendation for project implementation.

Level of significance after Mitigation

Demolition cannot be accomplished in conformance with the *Secretary's Standards* and demolition by its nature is material impairment of the historical resource and thus, impacts would remain significant after mitigation. Cultural resources impacts can be mitigated to a less than significance level with implementation of the Mitigation Measure for Archaeology.

ALTERNATIVES

Alternatives to the project were evaluated in attempt to consider impact reducing measures. All alternatives strive to achieve the basic program elements of the proposed project to remove the Adobe from the high school campus while minimizing historical and cultural resources impacts. It must be stated at the outset the California Historical Building Code (CHBC, Part 8 of Title 24, California Building Code) was considered as an essential component each alternative analysis and would be used as the code alternative for implementation should a feasible alternative be selected by decision makers. Relocation off site would be permitted by the City of San Marino and stabilization *in situ* or in place would be permitted by the Division of the State Architect (DSA). As noted in greater detail below, while DSA has a policy in place to address existing non-conforming buildings on school campuses, it is unlikely that the CHBC would provide any relief from the prevailing code.

No Project

The no project alternative would not meet the project objective of removing the Adobe from the high school campus. The no project alternative would maintain or preserve the Adobe in its current condition with limited public accessibility. Preservation of the Adobe *in situ* or in place with the same level of maintenance afforded it over the last several years is a cause of concern. Evidence of rising damp and thus moisture infiltration in the east wall of the south wing could be a condition found elsewhere in the building and could eventually lead to severe damage if unchecked. The San Marino Unified School District is not in the business of maintaining non-school function buildings and has no plan to do so. Without a formal agreement with another organization, such as the San Marino Historical Society, to maintain the Adobe and provide for limited public use, the building is seen as an eyesore, restricts student use and will continue to be poorly maintained. While maintenance is preservation under the *Secretary's Standards*, there is no maintenance, stabilization or mothballing implementation plan, and thus the no project alternative will continue to have a potentially significant impact on the historical resource.

Level of significance after mitigation

The no project alternative would be conformance with the *Secretary's Standards* if steps were taken to maintain the adobe structure and make it available to the public. As neither of these approaches are workable for the San Marino United School District, the no project alternative appears to have a potentially significant impact.

Relocation and Stabilization at Lacy Park

Relocation of the Michael White Adobe would be accomplished by removing and disposing of the steel picket fence to the north and east, removing landscape plantings, demolishing roof and chimney structures, removing concrete and brick flatwork within the fenced area and brick floors inside the Adobe. Utilities would be capped and removed at the line of existing fencing. The existing plaque on pedestal from 1956 would be moved in the relocation scenario. Relocation of the Adobe would remove approximately four feet of the top surface of soil in order to provide for jacking, cribbing and steel girders to facilitate the move. Relocation would require the same work to cap the site as noted under demolition. The relocation work is described in sketches prepared by structural engineer Michael Krakower, SE of Krakower & Associates (Krakower) dated June 18, 22 and 23, 2009 (**Figures 80-82**). These drawings were prepared in consultation with the author Robert Chattel, AIA (Chattel), project architect Tammy Schaeffer, AIA of Carmichael-Kemp Architects (Carmichael-Kemp), mover Ralph Clark of American Heavy Moving and Rigging, Inc. and contractor Jeff Seidner of Eagle Restorations Group, Inc. (Eagle) (collectively, A/E team). In addition to the three Krakower sketches, construction steps for

staging and relocation are further described in a report prepared by Carmichael-Kemp dated June 23, 2009 (**Figure 83, pages 1-3**).

The following is a summary of steps for staging and relocation of the Adobe from San Marino High School (donor site) to Lacy Park (receiver site). In order to prepare the Adobe, once the site flatwork, brick flooring and chimney are removed, the footings of each wing of the adobe would be exposed by excavating in a sequential pattern below the adobe walls to replace the existing footing with a new reinforced concrete bond beam. The new bond beam installed at the base of the adobe walls will be used both during the relocation process and as part of the new foundation at the receiver site. The existing ceiling and roof structures will be removed and the adobe walls sandwiched with plywood and wood stud temporary walls (falsework) on both sides of the adobe wall. The adobe wall will be protected with batt insulation prior to placement of the plywood falsework and all thread with washers will be through-bolted in the adobe walls. In order to stabilize the top of the adobe walls, additional temporary steel X-braces or a plywood diaphragm will be applied. There will also be bolster or other temporary structures applied to the interior of the two wings to ensure their stability during the move. It is the opinion of the A/E team that relocation of the Adobe from the donor site, following the procedure outlined in the sketches and report, to the receiver site is technically feasible.

The preliminary move route is described in a map (**Figure 69**) and the general location at the receiver site in Lacy Park is described as the receiver site zone (**Figures 70-79**). The San Marino City Council has approved Lacy Park and the receiver site zone as an acceptable location for relocation of the Adobe on its property. A map showing a specific location described as Alternate 3 (**Figure 71**) was provided for City Council consideration; however it is understood that a more suitable location in proximity to the Thurnher House at the entrance to Lacy Park is an acceptable minor modification of the City Council-approved receiver site. The relocation site shown in **Figure 71** would place the Adobe immediately east of the Thurnher House on a site currently occupied by a lawn and several old growth trees, including at least three substantial oak trees. As proposed at this specific receiver site, relocation and placement of the Adobe may require removal of some of these trees as placing an adobe structure within the canopy of a tree would be inappropriate. In addition, **Figure 71** appears to change the compass orientation of the relocated Adobe, which should be carefully considered.

When the Adobe is relocated it will be placed on a new foundation as shown in a Krakower sketch. Grading, compaction and other preparation of the receiver site including stubbed out utilities would need to be further documented. It should be noted that the relocation scenario does not include full rehabilitation of the Adobe, but rather stabilization only. Stabilization in the relocation involves placement of the adobe structure on the new foundation with sufficient site work to ensure water flow away from the adobe structure, construction of new roof structures and sheathing, and patching of exterior surfaces as necessary all to provide a watertight assembly. It is anticipated that a new chimney, flooring, and other work will be required to fully rehabilitate the relocated Adobe for use.

Relocation of the Adobe from the donor to receiver site will require implementation of the Mitigation Measure for Documentation, Mitigation Measure for Archaeology and Recommendation for Salvage. In addition, the following mitigation measure is provided to ensure that feasibility of the relocation and stabilization of the Adobe on the receiver site is successful. The following mitigation measure will reduce historical resources impacts to a level of less than significant. As the exact siting of the relocated adobe is in flux, the following mitigation measure would reduce potentially significant impacts of inappropriate siting.

Mitigation Measure for Relocation and Stabilization

San Marino Unified School District shall engage a qualified architectural and engineering team (preservation consultants) to plan and move the Adobe from the donor site at San Marino High School to the receiver site at Lacy Park. The preliminary maps, sketches and reports prepared for the relocation shall serve to guide all future associated work through design development, construction documents, and construction administration. The architect on the team shall meet the Secretary of the Interior's Professional Qualifications Standards in historic architecture and the structural engineer shall have a minimum of 10 years experience in historic preservation projects of a similar nature including work on adobe structures. The mover and contractor responsible for implementing the work shall meet like minimum qualifications standards. The preservation consultants shall recommend the final receiver site employing the criteria contained in *Moving Historic Buildings*, particularly with respect to appropriate solar orientation and relationship to other site features and the *Secretary's Standards* shall be employed to minimize harm and maximize preservation of physical character. Construction documents prepared by the preservation consultants, including the final relocation route, shall be reviewed and approved by the District Superintendent or designee and receive all required clearances from governmental agencies with jurisdiction over the relocation route prior to commencing any work on the donor site. The San Marino Unified School District and preservation consultants shall seek early consultation with local governmental agencies and shall use the California Historical Building Code (Part 8 of Title 24) to the maximum extent possible.

Level of significance after Mitigation

The level of significance after mitigation for the relocation to and stabilization of the Adobe at Lacy Park would be less than significant because the important character-defining feature of the Adobe, essentially the adobe walls, would remain intact and be visible to the public. The Adobe would be stabilized on a new foundation and be watertight. The Adobe would be operated in a manner similar to the Thurnher House and accessible on a regular basis to the public. While there are impacts caused by the work necessary to move the structure, relocation and stabilization can be accomplished in conformance with the *Secretary's Standards*. Cultural resources impacts can be mitigated to a less than significant level with implementation of the Mitigation Measure for Archaeology.

In addition, the relocation to Lacy Park would provide the Adobe with a more appropriate setting than its current location at the San Marino High School campus. Rehabilitation guidelines⁴² of the *Secretary's Standards* define setting as, "The area or environment in which a historic property is found," and recommends, "Retaining the historic relationship between buildings and landscape features of the setting." The current setting is has been severely compromised and is inappropriate an adobe built in the 1800s would not have been constructed within a school campus surrounded by athletic facilities, but rather would have been located in a more rural setting appropriate for residential use. Relocation and stabilization at Lacy Park would provide a more historically appropriate setting for the Adobe than its current placement within the high school campus, supporting the notion that relocation and stabilization is an environmentally superior choice when compared to leaving the adobe in place.

⁴² *The Secretary of the Interior's Standards for Rehabilitation & Illustrated Guidelines for Rehabilitating Historic Buildings* (National Park Service, 1997), 77.

The following alternatives were considered but rejected as infeasible.

Relocation and Stabilization at Huntington and Gainsborough Drive

Relocation of the Adobe elsewhere on the San Marino High School campus including possible placement at the northwest corner of Huntington and Gainsborough Drives was considered but rejected as infeasible. Use of the Rotary Park as the receiver site would severely restrict available parking allocated to school use. In addition, because the proximity of placing the relocated Adobe adjacent to the Thurnher House in Lacy Park, which is operated by the San Marino Historical Society, would provide for greater accessibility by the public. If the Adobe were relocated to Huntington and Gainsborough Drives and not used by students and fenced from the campus, this option would have the same impacts but with limited public use similar to the no project alternative. Relocation to Lacy Park due to the fact it would provide greater access to the public was thus found to be preferable, critical parking at the high school not be displaced, and thus the Huntington and Gainsborough Drives site was not further studied.

The following alternatives were considered but rejected for the reasons noted. The first rejected alternative involves reconstruction brick by brick at either Lacy Park. Reconstruction is a more invasive alternative than rehabilitation and would likely cause greater loss of historic building fabric due the fragility of the material. As this more invasive approach is less preferable to alternative for relocation described above, it was rejected. Retention of the Adobe *in situ* or in place was also considered and rejected because of the requirements for compliance with the Field Act and associated Division of the State Architect policies regarding existing non-conforming buildings proposed for public school and student use. This alternative would not retain visibility of the adobe walls and thus was rejected.

Relocation and Stabilization by reconstruction

An alternative method of relocating the Adobe was also considered by the Krakower and Eagle. The alternative method by careful removal of plaster of each side of the adobe walls and taking the adobe walls apart brick by brick, documenting the location of each brick for reconstruction. Damaged brick would be replaced with stabilized and unstabilized adobe units. In this method, the adobe walls at the receiver site would have embedded reinforced concrete columns at corners that continue down into the subgrade analogous to a flag pole. Stone footings could be placed between the columns subgrade and adobe brick placed between the columns above grade. While this may be a cost effective way of relocating the Adobe, it appears this methodology would fall in the range of reconstruction rather than rehabilitation. As reconstruction involves the potential greater loss of fragile archaic material, including material infilling joints in the adobe brick walls, it seems this approach would be less preferable in a strict application of the *Secretary's Standards* because it is more invasive than relocating the two adobe structures as described above. This reconstruction method would nevertheless have a less than significant impact to the historical resource. It may have a reduced cost, but a potentially higher loss of historic building material or fabric. Therefore, this alternative method of relocation, which applies to the Lacy Park receiver site, is less preferable because of the potential loss of historic building fabric involved in the more invasive reconstruction approach.

Stabilization in situ or in place

If the Adobe remained on the campus, it could remained fenced and be operated as it has for the last several years with limited public use and no student use. If the Adobe were to be used by students for any period of time, it would require further stabilization under Division of the State Architect (DSA) requirements prepared and promulgated for existing non-conforming buildings for school use (**Figure 85**). It should be noted again that the CHBC would apply to the Adobe, however because DSA regulations outweigh the structural provisions of the alternative

code, its application would be limited. Chattel, Krakower and Carmichael-Kemp met with regional representatives of DSA to explore the opportunity to allow limited student use of the Adobe. It should be noted that the Los Angeles Regional Office of DSA has not approved any non-conforming building for school use and it appears that no adobe construction exists for use by students on any campus governed by DSA requirements in the region. Based on the conversation with DSA representatives, Krakower and Carmichael-Kemp prepared a sketch dated June 23, 2009 (**Figure 84**) and report dated June 23, 2009 describing construction steps for upgrading the Adobe in place for use by students (**Figure 83, pages 4-6**). The sketch describes the need to remove a sufficient area of the existing footing or foundation to install a new reinforced concrete footing to support plywood and wood stud walls which will permanently encase or encapsulate the existing adobe structure. The new foundation for the plywood and wood stud walls would be placed so as to avoid the existing condition of the foundation supporting the adobe wall. The existing ceiling and roof structures will be supplemented with plywood diaphragms and provide additional support at the top of the adobe wall with installation of permanent anchors set in epoxy resin. Similar to the relocated adobe, the adobe walls will be protected with batt insulation prior to placement of the permanent plywood and wood stud walls and all thread with washers will be through-bolted in the adobe walls.

While stabilization of the Adobe *in situ* or in place would allow the adobe structure to remain, it would no longer be visible on either the exterior or interior of the building. Permanent encapsulation of the adobe walls might be considered in conformance with the reversibility concept described in rehabilitation standard 10, "New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired." However, the most important feature of the historical resource would no longer be visible and thus would violate rehabilitation standard 2, "The historic character of the property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided." Concern is also expressed for encapsulating the adobe walls in a manner that might accelerate deterioration by retaining moisture behind the enclosure walls. This could cause possible future deterioration to go unchecked. As such, the permanent encapsulation of the adobe walls, while it would allow for student use, would not conform to the *Secretary's Standards*. Disturbance of the potential archaeological information in the area of the new foundations would be reduced to a less than significant level by implementation of the Mitigation Measure for Archaeology.

CONCLUSION

The subject property is identified herein as appearing eligible for listing in the National and California Registers and is thus a historical resource. The proposed project includes removal of the Adobe from the high school campus by demolition. Demolition is found to have a significant adverse impact on the historical resource and while mitigation measures are applied to the demolition scenario, historical resources impacts remain significant and cultural (archaeological) resources impacts would be mitigated to a less than significant level. The alternative considered for relocation and stabilization in a potential relocation zone at Lacy Park is found to have a less than significant impact on the historical resource as well as on cultural resources and would also have a beneficial impact on setting, highlighting relocation and stabilization at Lacy Park as environmentally superior. To ensure less than significant impacts of the relocation and stabilization scenario additional mitigation measures are provided. Other alternatives including relocation to Gainsborough and Huntington Drives and reconstruction were also considered but were not found preferable. The *Secretary's Standards* and California Historical Building Code are used in both the evaluation of the proposed project and in the mitigation measures, as well as in consideration of alternatives.

**Historic Photographs and other
documentation**

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Figure 1: South elevation (left) and north elevation of south wing (right), note two story wood frame addition, view northwest (Historic American Building Survey, 1936)



Figure 3: East elevation, south wing (left) and north wing (right), note east porch used as a garage, view southwest (Historic American Building Survey, 1936)



Figure 2: North elevation (left) and south elevation (right), note two story wood frame addition, view southeast (Los Angeles Public Library, 1936)



Figure 4: West elevation, view northeast (Historic American Building Survey, 1936)



Figure 5: South elevation (left) and east elevation of south wing (right), note two story wood frame addition, view northwest (San Marino Historical Society, nd)



Figure 7: East elevation, view southwest (Los Angeles Public Library, nd)

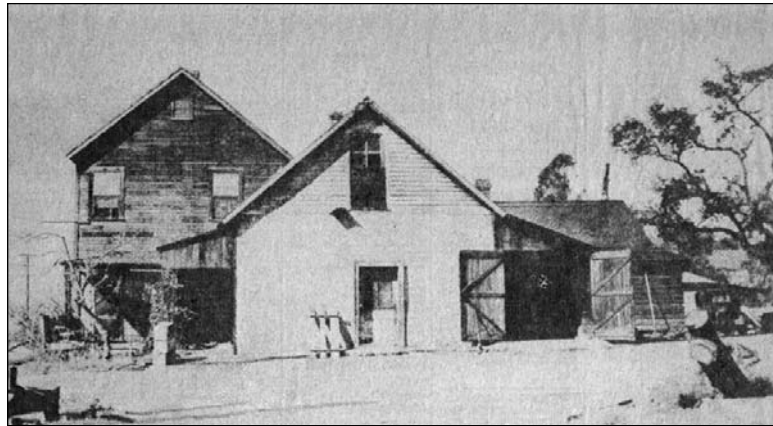


Figure 6: East elevation, note two story wood frame addition, view west (Huntington Library from the collection of Helen S. Giffen, nd)



Figure 8: South elevation, view northwest (San Marino Historical Society, 1947)



Figure 9: West elevation (left) and south elevation (right), view northeast (San Marino Historical Society, 1947)



Figure 10: South elevation, view northwest (San Marino Historical Society, 1947)



Figure 11: North elevation, south wing (left) and north wing (right), view southwest (San Marino Historical Society, 1952)



Figure 12: South and east elevations, view northwest (San Marino Historical Society, 1952)



Figure 13: Detail of east elevation (San Marino Historical Society, 1952)



Figure 15: Detail of east elevation (San Marino Historical Society, 1952)



Figure 14: West elevation, view northeast (San Marino Historical Society, 1952)



Figure 16: South and east elevations, view northwest (San Marino Historical Society, 1952)



Figure 17: South elevation, view northwest (San Marino Historical Society, c. 1950s)



Figure 18: South elevation, note swimming pool, view north (San Marino Historical Society, nd)



Figure 19: East elevation corredores, view west (San Marino Historical Society, nd)



Figure 20: West and south elevations, view northeast (San Marino Historical Society, nd)



Figure 21: School children visiting Adobe (San Marino Historical Society, 1977)



Figure 22: K.L. Carver inside adobe, note earlier photographs (Figures 20-24) on mantel (San Marino Historical Society, c.1950s)



Figure 23: Interior of adobe with students (San Marino Historical Society, c.1950s)

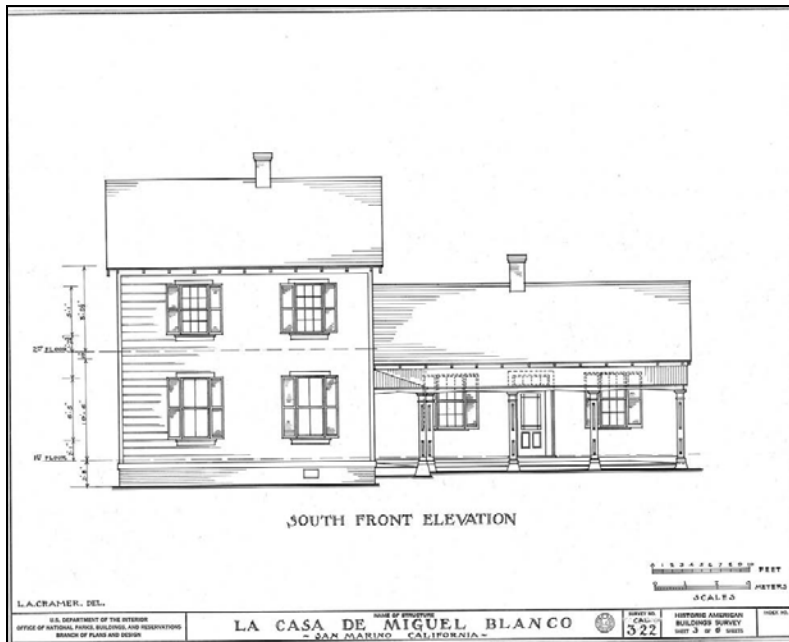


Figure 24: Drawing of "South Front Elevation" (Historic American Building Survey, 1936)

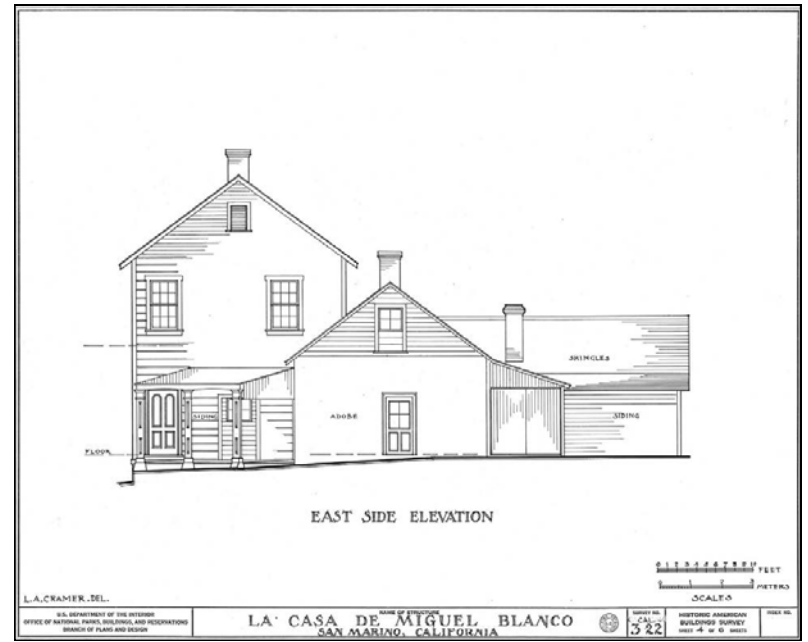


Figure 25: Drawing of "East Side Elevation" (Historic American Building Survey, 1936)

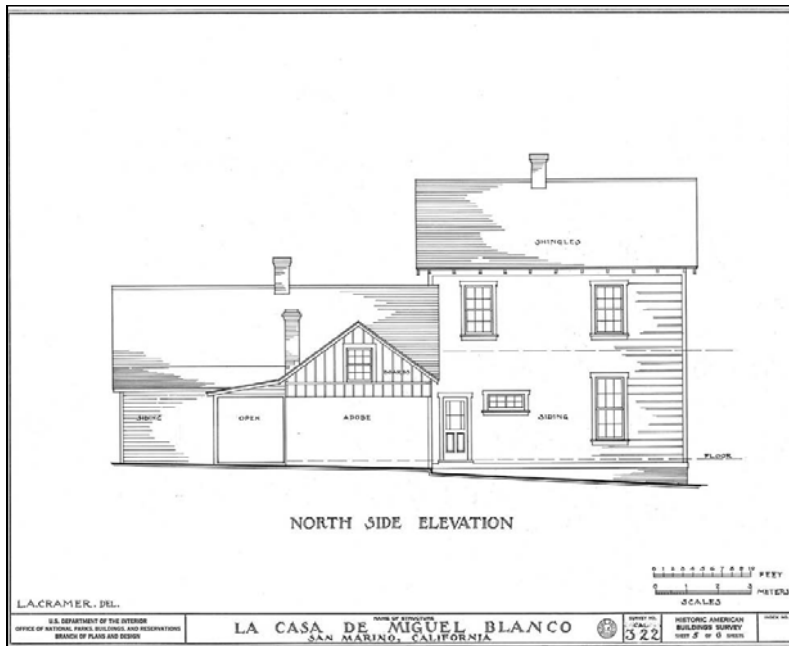


Figure 26: Drawing of "North Side Elevation" (Historic American Building Survey, 1936)

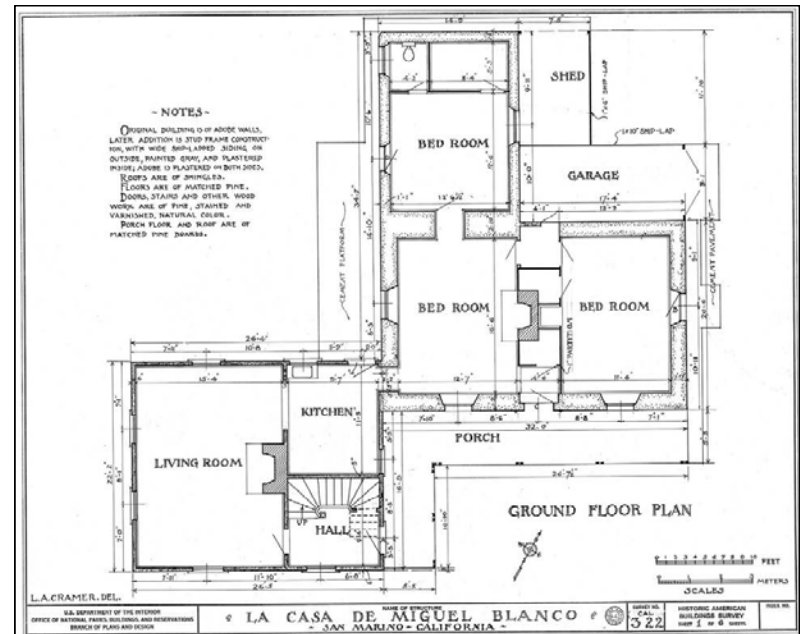


Figure 27: Drawing of "Ground Floor Plan" (Historic American Building Survey, 1936)

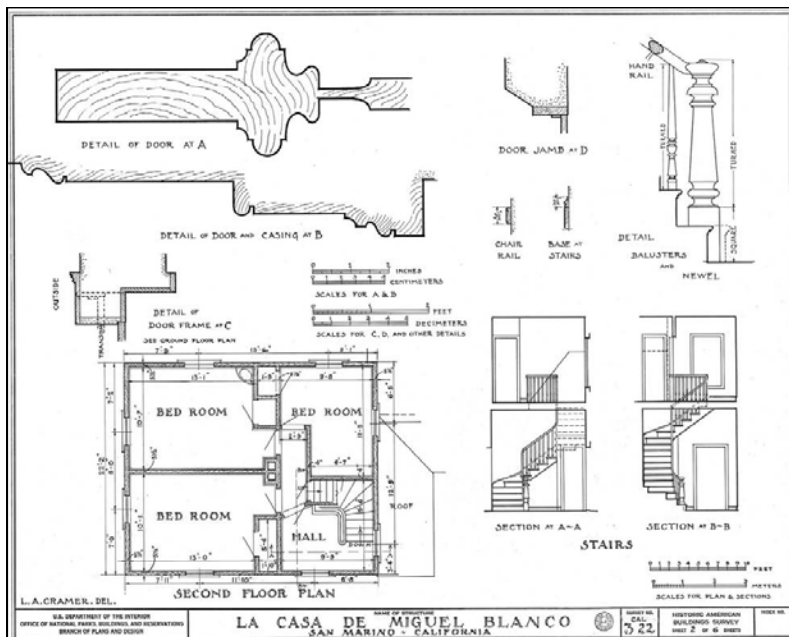


Figure 28: Drawing of "Second Floor Plan" (Historic American Building Survey, 1936)

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Figure 29: Michael White Adobe
Department of Parks and Recreation Form

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HISTORIC RESOURCES INVENTORY

IDENTIFICATION

1. Common name: Miguel Blanco Adobe (A. 1108-)
2. Historic name, if known: Michael White Adobe
3. Street or rural address: 2701 Huntington Drive
City: San Marino ZIP: 90032 County: Los Angeles
4. Present owner, if known: City of San Marino Address: 1665 West Drive
City: San Marino ZIP: 90032 Ownership is: Public Private
5. Present Use: Storage Building Original Use: Private Residence
- Other past uses: _____

DESCRIPTION

6. Briefly describe the present physical appearance of the site or structure and describe any major alterations from its original condition:

Located in the northwest corner of the San Marino High School campus, the one-and-a-half story adobe has a wood shake roof, wood frames around the doors and windows, and two chimneys. The numerous alterations include exterior wiring for electricity, addition of wire cages covering the windows and doors, and addition of several windows. White stucco now covers the original adobe foundation. K.L. Carver restored the residence in 1953 but the interior and exterior have since been vandalized.

7. Locational sketch map (draw and label site and surrounding streets, roads, and prominent landmarks):



DPR 523 (Rev. 7/75)

19-174693
Site 1791/03

UTM _____ Site _____ No _____ Yr. _____
UTM _____ 0 _____ NR 3 SHL _____
Lat _____ Lon _____ Eas _____ Sig _____
Adm T2 T3 Cat HABS HAER Fnd _____
UTM 11/398700/3776560 110A

8. Approximate property size:
Lot size (in feet) Frontage _____
Depth _____
or approx. acreage 26
9. Condition: (check one)
a. Excellent b. Good c. Fair
d. Deteriorated e. No longer in existence
10. Is the feature a. Altered? b. Unaltered?
11. Surroundings: (Check more than one if necessary)
a. Open land b. Scattered buildings
c. Densely built-up d. Residential
e. Commercial f. Industrial
g. Other school buildings and grounds
12. Threats to site:
a. None known b. Private development
c. Zoning d. Public Works project
e. Vandalism f. Other
13. Date(s) of enclosed photograph(s): July 1977
037-8

19-174693

NOTE: The following (Items 14-19) are for structures only.

14. Primary exterior building material: a. Stone b. Brick c. Stucco d. Adobe e. Wood
f. Other
15. Is the structure: a. On its original site? b. Moved? c. Unknown?
16. Year of initial construction 1845 This date is: a. Factual b. Estimated
17. Architect (if known): _____
18. Builder (if known): _____
19. Related features: a. Barn b. Carriage house c. Outhouse d. Shed(s) e. Formal garden(s)
f. Windmill g. Watertower/tankhouse h. Other school grounds and buildings None

SIGNIFICANCE

20. Briefly state historical and/or architectural importance (include dates, events, and persons associated with the site when known):

Michael Claringbold White, called Miguel Blanco in California, was born in England and came to California in 1829. He was an accomplished sailor who served in that capacity as well as a mail courier for the Mexican government of California in the mid 1830's. In 1831 White married Maria del Rosario, daughter of Dona Eulalia de Guillen, a politically powerful woman in Southern California. White was granted land from the Mexican government in 1843 and built his adobe several years later. An orchard and vineyard were also located on the property. Later owners included L.H. Titus and James Poord. San Marino High School has been built around the original structure.

22. (cont.) Hoover, Mildred B., & Rensch, Hero E. & Ethel G. Historic Spots in California. 3rd ed. Stanford: Stanford Univ. Press, 1966.

21. Main theme of the historic resource: (Check only one): a. Architecture b. Arts & Leisure
c. Economic/Industrial d. Exploration/Settlement e. Government f. Military
g. Religion h. Social/Education

22. Sources: List books, documents, surveys, personal interviews, and their dates:

Historical Society of Southern California. Annual Publications. Vol. XIX, Part 1, 1928.
Historical Society of Southern California Quarterly, September, 1940, p. 88-101. White, Michael C. California: All the Way Back to 1828. Los Angeles: Glen Dawson, 1956. (cont.)

23. Date form prepared July 1977 By (name): Pamela Lee Gray
Address: 900 Exposition Blvd. City: Los Angeles ZIP: 90007
Phone: (213) 746-0410 x241 Organization: Natural History Museum

(State Use Only)



869621-6T

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Contemporary Photographs

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Figure 30: East elevation, south wing (left) and north wing (right), view southwest (Chattel Architecture, Planning & Preservation, Inc.(CA), 2008)



Figure 31: North wing, east elevation (left) and north elevation (right), view southwest (San Marino School District (SMSD), 2008)



Figure 32: Detail of porch along east elevation, south wing, view south-east (SMSD, 2008)



Figure 33: West elevation, north wing (left) and south wing (right), view northeast across pool (CA, 2008)



Figure 34: South elevation, south wing (left) and east elevation, south wing (right), view northwest (CA, 2008)



Figure 35: Detail of porch along south elevation, south wing, view west (SMSD, 2008)



Figure 36: Porch along south elevation, south wing, view east (CA, 2009)



Figure 37: Detail of porch roof along south elevation, view west (CA, 2009)

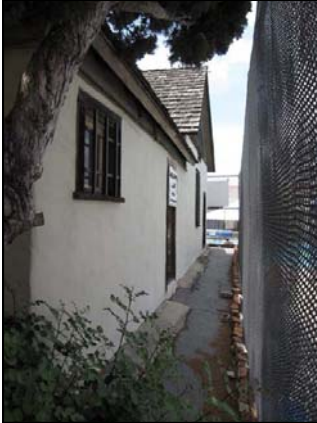


Figure 38: West elevation, north wing (foreground) and south wing (background), view southeast (CA, 2009)



Figure 39: West elevation, south wing (foreground) and north wing (background), view northeast (CA, 2009)



Figure 40: Detail of porch door along north elevation, south wing, view west (CA, 2009)

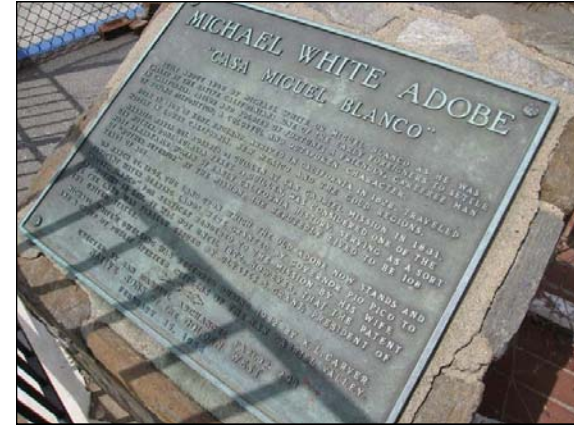


Figure 41: Detail of plaque on pedestal, view southwest (CA, 2009)



Figure 42: Interior of north wing, view northeast (CA, 2008)



Figure 43: Detail of window on north wing, view northwest (CA, 2009)



Figure 44: Interior of north wing, view southwest (CA, 2008)



Figure 45: Interior of north wing, view northeast, note evidence of chimney remnant in upper right corner of photo, (CA, 2008)



Figure 46: Detail of north wing, view west (CA, 2009)



Figure 47: Interior of north wing with infilled window, view east (CA, 2009)



Figure 48: Connection between north and south wings, note panel removed to reveal adobe construction, view south-east (CA, 2008)



Figure 49: Detail of adobe construction, view east, note north wing wall (left) and south wing wall (right) with gap (CA, 2009)



Figure 50: Interior of south wing, west room, view northeast (CA, 2008)



Figure 51: Fireplace in south wing, west room, view southeast, note door to south elevation porch (CA, 2008)



Figure 52: Interior of south wing, east room, view northeast (CA, 2009)



Figure 53: Interior of south wing, east room, view southeast (CA, 2009)



Figure 54: Interior of south wing, east elevation (background), note cracked wall (CA, 2009)



Figure 55: Detail of cracked wall (CA, 2009)



Figure 56: South wing attic, view west, note contemporary roof framing (CA, 2009)



Figure 57: South wing attic, view east, note contemporary roof framing (CA, 2009)

Maps and Aerial Photographs

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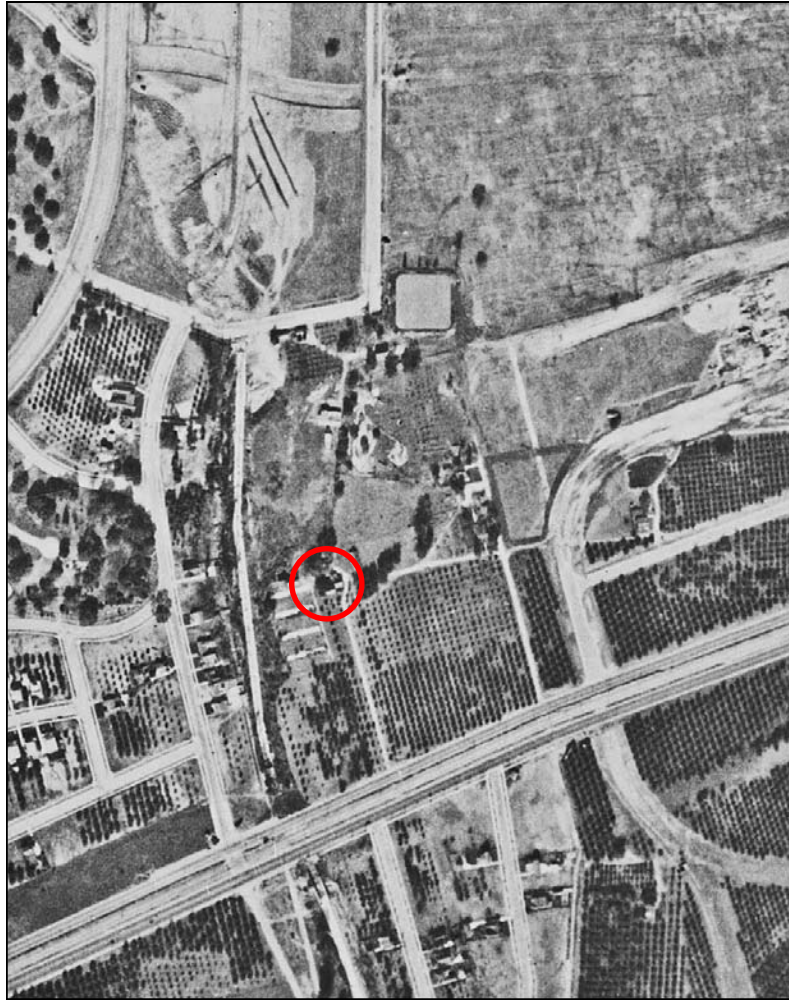


Figure 58: 1928 aerial photograph, subject property circled in red (source: Fairchild)

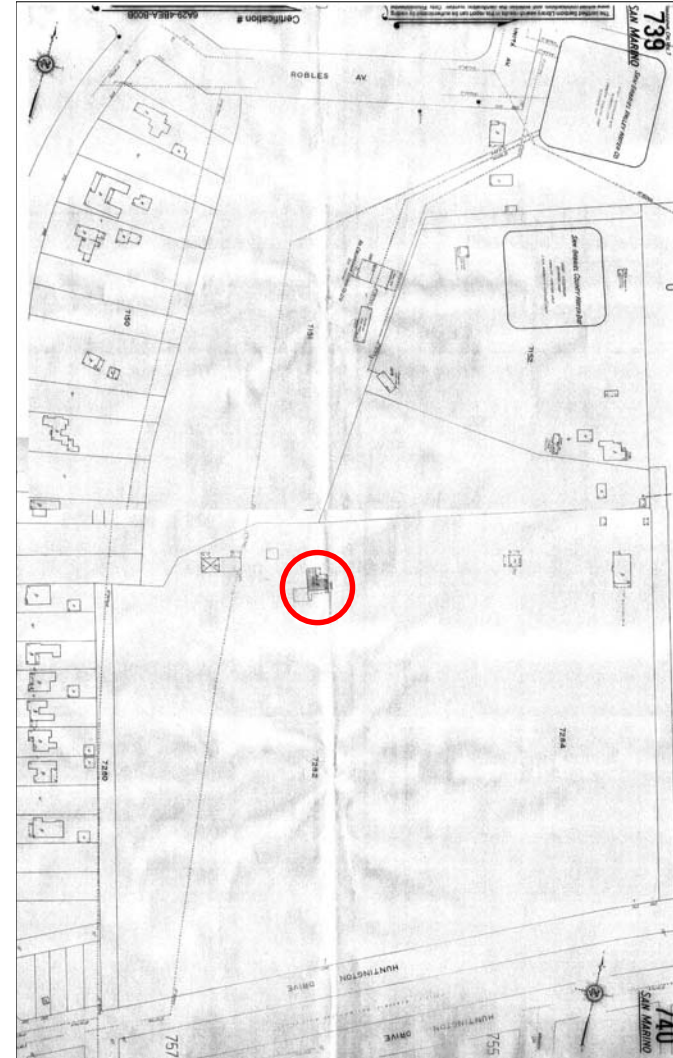


Figure 59: 1930 Sanborn Fire Insurance map



Figure 60: 1938 aerial photograph (source: USDA-ASCS)

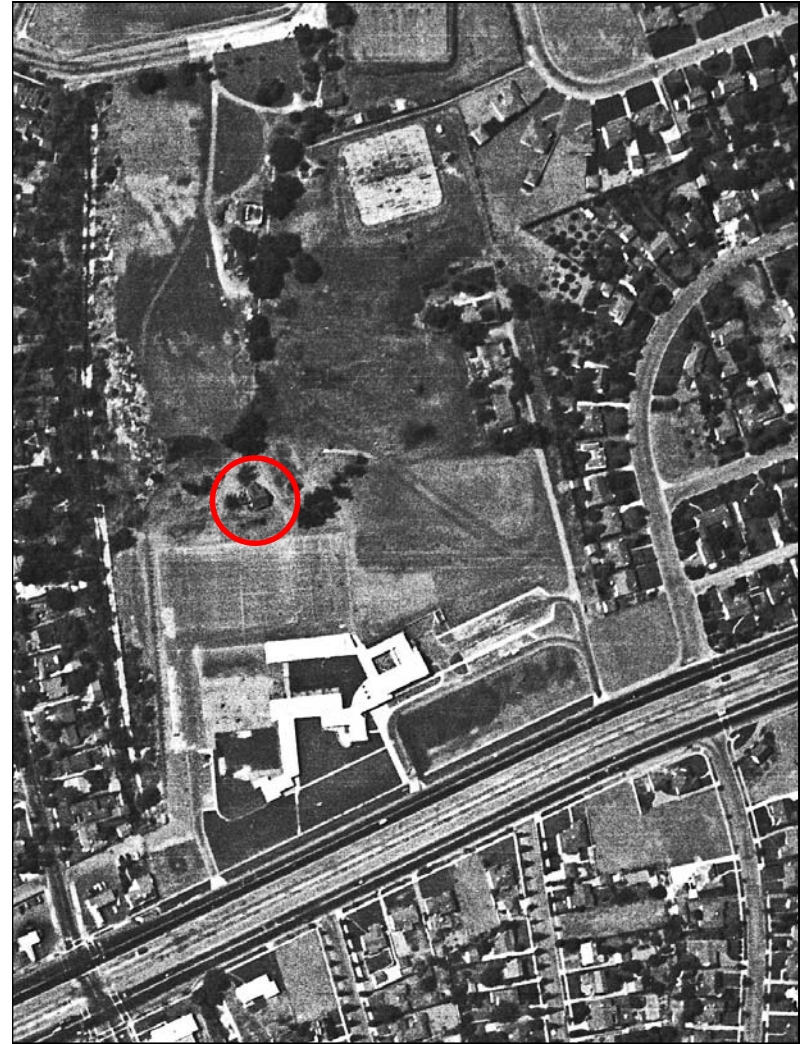


Figure 61: 1949 aerial (source: Fairchild)

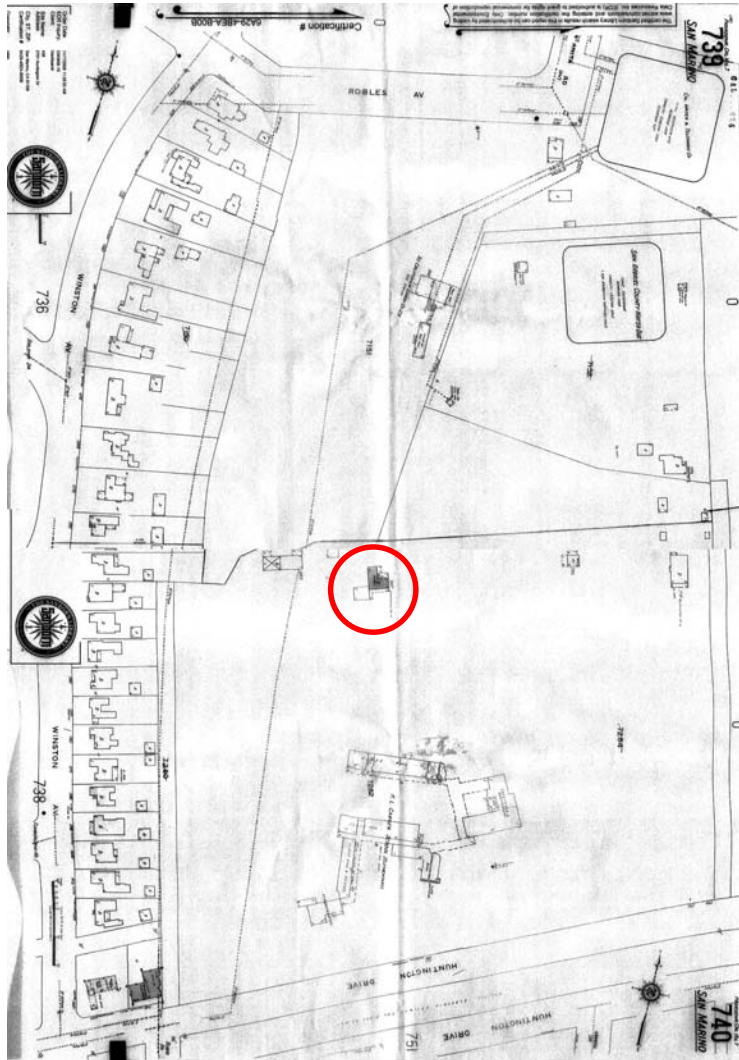


Figure 62: 1950 Sanborn Fire Insurance Map.



Figure 63: 1953 aerial (source: USDA-ASCS)



Figure 64: 1959 aerial of San Marino High School campus (source: San Marino Historical Society)

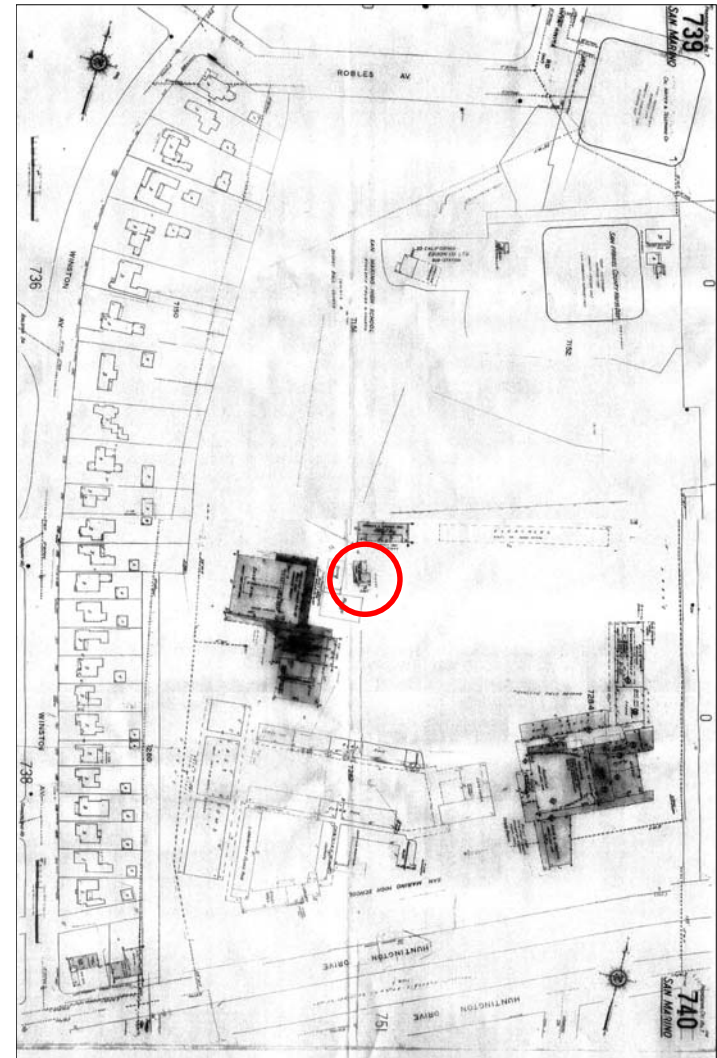


Figure 65: 1961 Sanborn Fire Insurance Map

**Engineering drawings and
Division of the State Architect Policy**

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**Figure 68: Michael White Adobe
Conservation Options Report
Prepared by Melvyn Green and Associates**

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**Michael White Adobe in San Marino
Conservation Options Report**

Prepared for

**San Marino Historical Society
San Marino, California**

Submitted by

Melvyn Green and Associates, Structural Engineers

October, 2007

DRAFT REPORT

Melvyn Green and Associates, Inc. 21311 Hawthorne Blvd., Suite 220, Torrance, CA 90503

Scope and Intent

Introduction

The historic Michael White Adobe in San Marino is located on the grounds of San Marino High School. There is a community interest in preserving this structure representing the early history of San Marino as well as the Los Angeles region.

The adobe, being located on the grounds of the San Marino High School, is restricted from use by several factors. In addition there are issues relative to the preservation of the building due to environmental and siting condition.

In support of the efforts to determine the preservation possibilities for the building, Melvyn Green and Associates was retained by the San Marino Historical Society with additional support from the City of San Marino and the San Marino School District.

This report summarizes the observations and findings for consideration by the involved parties.



Photo 1 - East elevation of the Michael White Adobe. Wood gable end with large door possibly an old stairway or hayloft.

Methodology and Limitations

The building was inspected in the field and the materials and details of its construction were identified.

Informal discussions were held with representatives of the Division of State Architect (DSA) which regulates school building construction, and the State Historic Preservation Office (SHPO) personnel.

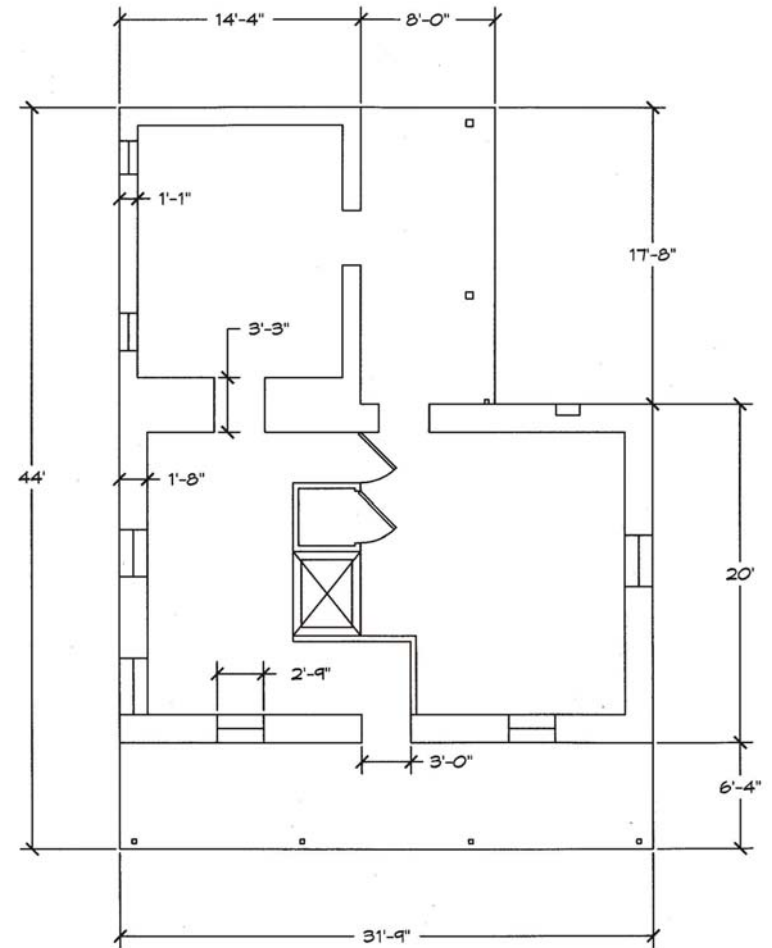


Figure 1 - Plan of the Michael White Adobe in San Marino.

Building Structural Description

Overview

The building is a three room structure apparently constructed in two phases. A plan is shown in Figure 1. The phasing of the construction and the specific era of the work is not known but should be studied by a historian.

The building is "L" shaped. The southern two rooms are in an adobe building that measures about 31 feet 9 inches by 20 feet outside to outside. The dividing wall is wood construction. It is possible that this was initially one large room later divided into two rooms. There is a brick fireplace approximately in the center of the space.

The north room measures about 14 feet 4 inches by 17 feet 8 inches outside to outside. This room has a bathroom in the north west corner.

It appears that the building may have been constructed as two structures as the wall between the north and south rooms is double wide, 3 feet 3 inches total thickness..

Each wing has a gable type roof. The gable ends are wood.

There is a porch on the south side of the building and one on the north part of the east side of the structure. The porch construction has very attractive detailing at the post and beam connections.

Structural Description

Foundations

The foundations were not visible. Typically the construction of adobe buildings begins with a rubble stone foundation. The foundation extends above grade by 6 inches or more. The stones are not mortared. This type of construction permits any ground water, rising damp, to be evaporated at grade. In this manner the water does not enter the adobe wall causing deterioration.

Often, in the building's later life the stones are mortared by later owners. As the years progress, the foundation stones are often covered with earth and planting. (Historically the environment was desert with sparse landscaping on the site and adjacent to buildings.)

The floor is of red brick construction, possibly over a concrete slab on grade. Traditionally adobe buildings had dirt floors, later these were covered with wood

on sleepers. Termites and moisture deteriorated the wood, ultimately resulting in their replacement with a concrete slab.

Adobe Walls

The adobe walls of the south portion of the building are of earthen material measuring about 1 foot 8 inches in thickness. Wall height was measured at between 7 and 8 feet. No concrete bond beam was observed at the top of the walls.

The adobe walls of the north building measured 13 inches in thickness. The height was measured as approximately 7 feet. The roof slope is such that the walls are much lower than the ceiling.

Roof Construction

The roof construction consists of typical rafter and ceiling joist type construction. Observed rafters were 2 X 4 lumber spaced at 16 inches on center. The sheathing on top of the roof was not observed but assumed to be 1 X 6 spaced sheathing.

Porch roofs were framed with 2 X 4 rafters at 24 inches on center with solid sheathing. These are supported by 6 inch by 8 inch beams. Beams are supported by 6 inch by 6 inch posts. The porch post foundations were not observed.

The roof of the north building is quite steep, a 6:12 slope. The adjacent porch has a 3:12 slope. The roof covering is wood shingles.

Interior Walls and Ceiling

The interior walls are wood frame construction. All adobe walls have a gypsum plaster finish. The toilet room has wood boards as the wall finish.

The ceilings are 1 X wood boards nailed to the ceiling joists.



Photo 2 - Northeast view of the structure.



Photo 4 - Interior of southwest room showing wall and ceiling finish.



Photo 3 - Interior of north room. Sloped ceiling is the building's roof.



Photo 5 - Brick floor. Water damage on wall. This is caused by moisture rising from the ground.



Photo 6 - Detail of trim at south porch.

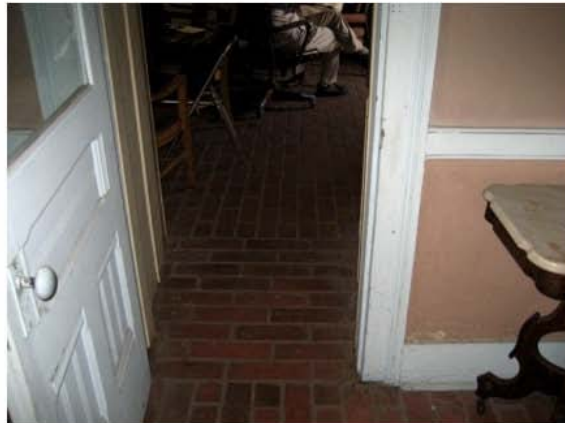


Photo 7 - Details of early door and trim. Note brick floor, unusual for an adobe.

Issues and Options

Overview

The community faces several choices for the building. These are preservation in place, relocating the building to a new site and third documenting the building in an archival manner and consider demolition.

These three options are discussed below.

Preservation in Place

The preferred preservation approach is for the building to remain to be preserved in place.

Current Condition

The building is an unreinforced masonry building. It is considered a potential earthquake hazard. It may not be used by students or school personnel.

State regulations require that the building be fenced. The building is currently fenced on all sides. Public access is only by appointment. Therefore it is currently in compliance with state school safety regulations.

Options

If the building is to be used, by the public or students, it would require seismic strengthening. Under the State Historic Building Code (SHBC) it is considered as providing a reasonable degree of life safety if the walls are within a certain height to thickness (h/t) ratio, that there is a bond beam at the top of the walls and that the shear in the walls meets a calculated stress limit.

This building does not have a bond beam. The walls of the north room have an h/t ratio of 6.5 which exceeds the 6.0 limit of the SHBC. Walls of the south rooms have an h/t of 4.5, which is within the limit.

Since the building has only a few windows, the shear is within the allowable limit.

Regardless of the SHBC criteria, the DSA would express great concern about the safety of the adobe structure. To meet their requirements for school use, the walls of the building would have to be reinforced. This would be accomplished by placing a layer of reinforcing steel on the interior side of the wall, attaching the reinforcing steel to the adobe with epoxy anchors, and applying a 3 inch, or more, layer of Shotcrete to the surface. (Shotcrete is a spray-on concrete.) In addition

there may have to be a concrete foundation constructed under the new shotcrete material. The roof would have to be anchored to the new wall material and have a layer of plywood applied to act as a diaphragm to brace and transfer the loads. It is probable that part or all of the roof framing would require replacement.

New electrical would probably be required. A decision on whether to retain the toilet would be necessary.

Obviously work on school property would have to meet the construction safety requirements as well as prevailing wage rules for public projects.

Costs

In earlier discussions we discussed the possible costs. Currently we would expect the cost to be more than \$500,000.

Relocation to a New Site

Relocation in place would permit rehabilitation of the structure and its continued reuse.

Current Conditions

The building is adobe construction and the individual masonry units are not bonded together with a mortar of reasonable strength.

Options

If the building were to be relocated the general procedure would be as follows:

The interior walls would be braced on both the interior and exterior surfaces. This would be accomplished by placing a layer of plywood on both surfaces, placing vertical "studs" about every two feet. Over this would be horizontal 4 X 6 timbers near the top, bottom and center. These would be tied through the wall with bolts. In addition there would have to be a diagonal bracing system in each direction.

A platform of steel beams would be placed under the building to lift it onto wheels for moving.

It is expected, from the observations of the building, that this is actually the moving of two buildings, the north structure and the south structure.

In order to move the building, it is probable that the roof would have to be removed. Whether it can be reused would depend on its condition. (Historical research may show a different shaped roof on the building than the current configuration.)

At the new site a foundation would have to be constructed. This would be a "simple" concrete foundation. The relocated building would be set on the new foundation. Then a bond beam would be cast at the top of the walls. The roof would then be placed on the structure or a new roof constructed. This would be followed by interior repairs and construction including the wood walls and plaster. The fireplace is not expected to be moved but would be reconstructed.

It is not expected that the building on the new site would have any interior toilet facilities. New electrical and lighting would be necessary.

This type of move is risky. It is possible that some of the adobe may come loose during the move and require additional repair and reconstruction.

Costs

The cost for this move might be in the range of \$400,000 or less including new electrical work. Work to prepare the new site is not included in this estimate.

Retain the Building in Place

The status quo remains an option for the building. At this time it meets all safety requirements to remain on the school grounds. It should have a bond beam constructed to improve seismic safety.

There is the potential for continuing deterioration to the structure from the adjacent uses. It is unclear how much water may be working its way into the building with the potential for damage.

Costs for improving seismic safety would be in the range of \$100,000.

Demolition

Demolition of the building would permit the school district to use the area where the building is currently and create a plan for the athletic facilities.

As an historical building its demolition would require an Environmental Impact Report. The report would require review of all options, such as discussed herein and mitigation measures. As a minimum the building would have to be documented to meet the archival requirements of the Historic American Buildings Survey (HABS) and the Library of Congress. Recent court rulings have limited the documentation option without rigorous examination of alternatives.

This cost would have to be borne by the school district.

Summary and Next Steps

The building, as it is, is not under any legal requirements for any construction work as long as students and school staff are kept out of the building.

A plan for use of the building at the school site or at a relocation site is necessary create a path for activities, regardless of which path is followed. The following activities should be considered:

Historic and Archival Research

A more in-depth documentation and history of the building should be developed. Whether it was constructed as two building is a question. What did the original roof look like, the pitch on the north room is very steep. What other historic evidence is available.

Design

Reuse of the building will require the services of a knowledgeable preservation architect to assist in developing a reuse and rehabilitation plan.

If the building is relocated a set of engineering construction documents must be developed.

Grant Search

The opportunities for obtaining grants should be explored.

Listing

While it is an historic building of local interest, it is not listed on the National Register of Historic Places. It should be verified whether it is listed on the State Register or on a local survey. This information will assist in determining if any grants are available for future work.

Resolution of Program

Understanding the options presented in this report should permit the Historical Society and the city to develop a plan for use or relocation of the building.

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Figure 69: Map of relocation route from San Marino High School (donor) to Lacy Park (receiver). (Google Maps)



Figure 70: Map of Lacy Park showing proposed relocation site. Note that alternative locations within Lacy Park are also under consideration. (Base map located online, http://www.ci.san-marino.ca.us/pdf_forms/publicworks/MAP8A_Reservation_Areas.pdf)

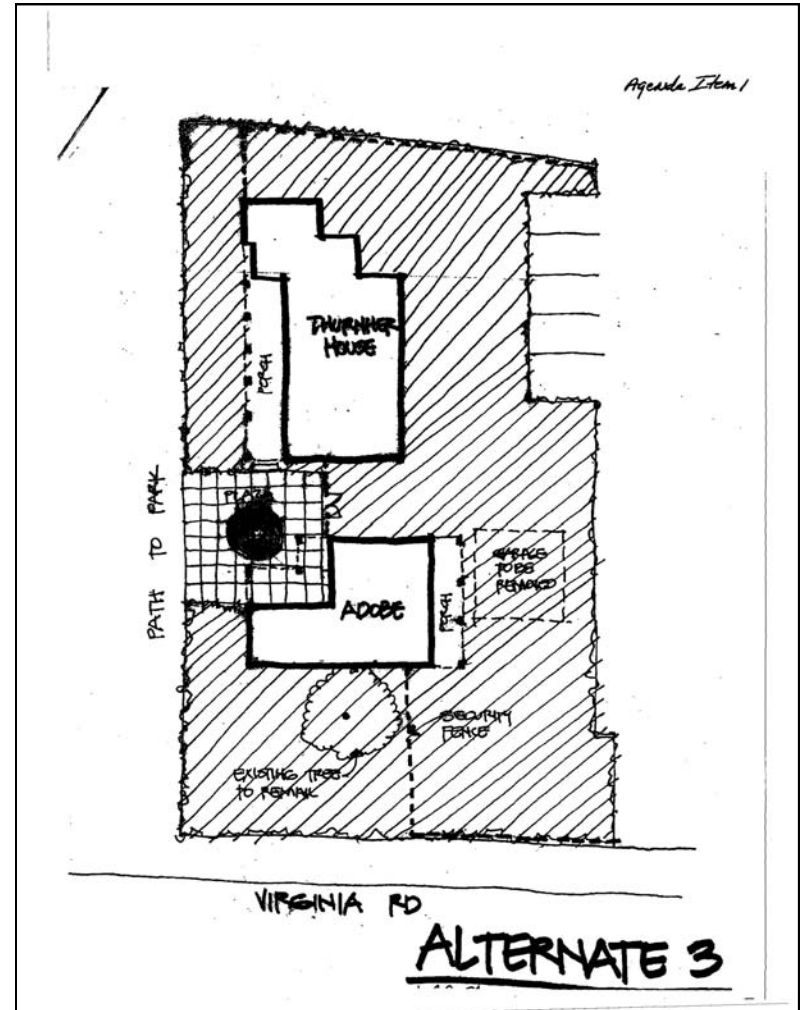


Figure 71: Sketch detailing proposed relocation site within Lacy Park.



Figure 72: Entrance to Lacy Park, possible receiver site for Adobe, view southwest (CA, 2009)



Figure 73: View of potential relocation site for Adobe from Virginia Road, view southwest (CA, 2009)



Figure 74: Historic Thurnher House in Lacy Park, south elevation, view northeast, note Adobe would be relocated near the house (CA, 2009)



Figure 75: East elevation of Thurnher House, view west (CA, 2009)



Figure 76: Garage behind Thurnher House, view north, note alternate 3 requires the relocation of garage (CA, 2009)



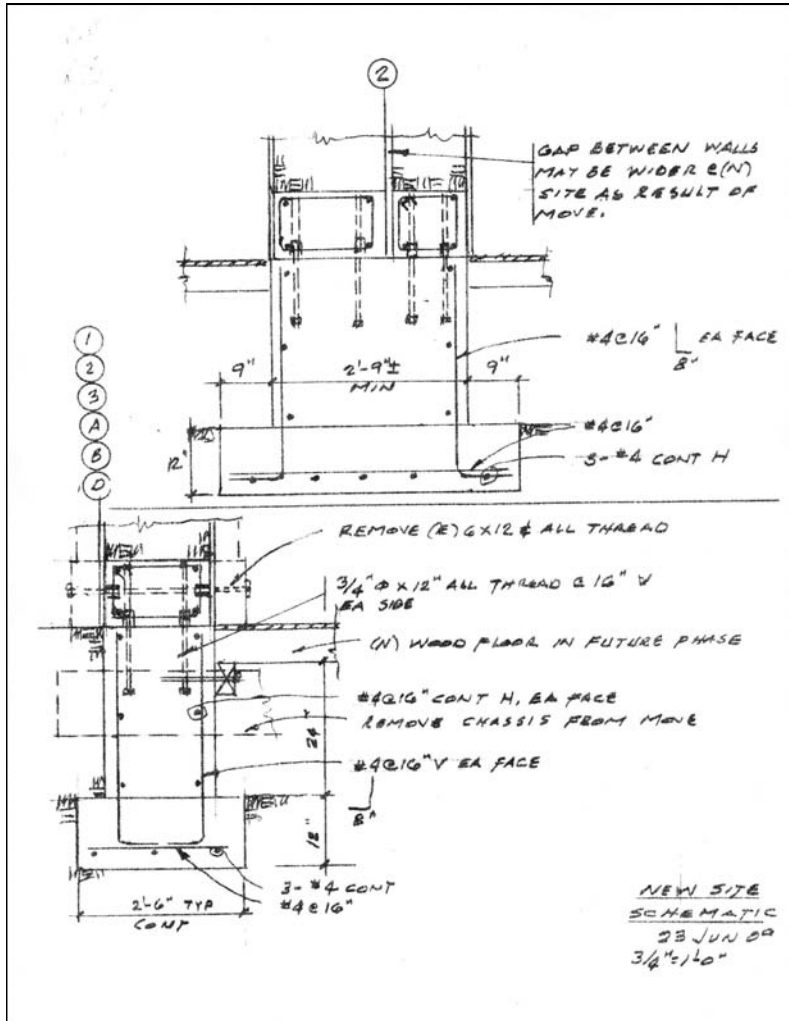
Figure 77: Potential relocation site for Adobe within Lacy Park, view southeast (CA, 2009)



Figure 78: Potential relocation site for Adobe within Lacy Park, northeast (CA, 2009)



Figure 79: Potential relocation site for Adobe within Lacy Park, view northeast (CA, 2009)



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Figure 82: New (receiver) site schematic for Adobe relocation. (Drawing prepared by Michael Krakower)

**Figure 83: Report detailing Construction Steps for
Staging and Relocation of Adobe
prepared by Carmichael Kemp Architects**

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**MICHAEL WHITE ADOBE AT SAN MARINO HIGH SCHOOL
CONSTRUCTION STEPS FOR STAGING & RELOCATION OF ADOBE**

1. The following description is based on 3 sketches prepared by Michael Krakower as follows, all attached:
 - dated June 18, 2009, entitled "MOVE"
 - dated June 22, 2009, entitled "MOVE"
 - dated June 23, 2009, entitled "NEW SITE SCHEMATIC"
2. The preliminary cost estimates will be based on prevailing wage labor rates, and will assume normal working hours and shifts.
3. There will be an Archaeological Monitor and/or Historical Monitor present during the staging and relocation of the adobe.
4. Demolition shall be with rotary non-impact type equipment only. Impact type tools are not permitted.
5. Building will be split into two sections for moving and relocation at the existing construction joint between the two sections of the building. A steel plate or some sort of sheeting will be slipped in between the two sections to stabilize the adobe when the first building section is pulled away from the remaining building section.
6. The roof will be removed and discarded. A new roof will be constructed at the new site. A plywood diaphragm will be installed to brace and anchor the tops of the adobe walls for relocation, after the existing roof is removed.
7. The existing window and door openings will be braced with 2x wood members.
8. The existing brick floor and/or slab will be removed and discarded.
9. The existing fireplace will be demolished.
10. The existing interior stud framed partition walls and the toilet shall be removed.
11. All doors have to be removed to allow the bottom bond beam to be continuous through the door-ways. It might be easier to remove the windows also.
12. All adjacent conflicting underground and above ground site utilities, exterior porches, 2 trees on the north side, planters and landscaping have to be removed prior to the move.
13. The existing exterior plaster finish on the adobe walls will remain. The assumption is that the existing adobe walls have no structural integrity or value. The adobe walls will be encapsulated and braced for relocation and structural stabilization by

installing two stud framed walls, one on each side of the existing adobe walls, with plywood adjacent to the adobe face. Some thru bolting, stud wall to stud wall, sucking the plywood tight to the adobe may be required, yet the adobe walls should not be crushed. In order to prevent crushing or damaging the adobe, there should be a compressible layer of material between the encapsulating plywood sheathing and the plaster of the adobe. One method might be by fastening batt insulation to the adobe prior to the plywood sheathing.

14. Some steel angles may be installed to protect corners of adobe walls.
15. The lower section of the existing adobe walls around the perimeter of the two building sections will be removed and replaced with a reinforced concrete bond beam to support the adobe walls during relocation. This bond beam will be continuous through door openings, and will be wide enough to provide support for a stud encapsulation wall which will be installed on the inside and outside of the existing adobe walls. The lower section of the existing adobe walls will be cut out and the new grade beam poured in alternating slot cut sections to maintain the stability of the existing walls.

Prior to slot-cutting the base of the adobe walls to form the new reinforced concrete bond beam, the adobe wall base has to be stabilized to minimize caving. This may be done with injection of a polyacrylic fluid that sets as a gel or similar soil cement mixture. The injection is done through a series of injection holes drilled into both sides of the walls. The stabilization zone will be taller than the final height of the bond beam.
16. Once the grade beam is in place, the existing foundation (which is anticipated to be cobble type foundation) will be excavated in locations where jacks will be installed. Jacks will be installed on each side of each opening, and at 4 ft. on center in between openings, all around the perimeter walls of the two building sections. These jacks will raise the building to a level to allow for installation of a grid steel beams (probably 4 to 5 ft. on center) to support the building during relocation. The preliminary layout of the beams will be determined by the relocation contractor (Ralph Clark of American Heavy Moving & Rigging Inc.) and Mike Krakower will design rebar in the grade beams to span between the steel beam supports.
17. In order to prepare the building for relocation and move the building sections out, the existing pool must be protected. This may require shoring of the retaining wall along the East side of the pool (west side of the adobe) where the adobe walls are only about 3-4 ft. from the pool retaining wall. There is slightly more room between the south wall of the adobe and the pool retaining wall – maybe 8 to 10 ft. Hand work may be required in these areas due to space constraints. Additionally, some sort of solid barricades will need to be constructed on the pool decks to keep construction debris from falling into the pool. For reasons of safety, the pool will be shut down for use while the building is being prepped for relocation, and until the building sections actually leave the site.

18. The concrete flatwork/walkway to the east of the adobe and alongside the seating of the base ball field, from the top of the stairs to the north will need to be replaced after the adobe is removed. It will undoubtedly be damaged by the relocation.
19. The path of travel to move the adobe building sections through the high school site to the street may require some modifications to provide the required width for transporting the building sections. It may be necessary to remove part of the chain link fence at the corner of the pool.
20. At Lacy Park, there will also need to be some modifications to allow the adobe building units to be moved into the site location adjacent to the Thurnher House. Most likely at least one of the brick pilasters and maybe a section of the tube steel fence will have to be removed and replaced after the building sections are moved in. Additionally, 2 to 3 trees may be required to be removed and the large oak trimmed.
21. At Lacy Park, a new permanent building foundation will be created and the building sections will be set on and anchored to the building foundation. The encapsulating framed walls on either side of the adobe walls will be removed and all holes patched. The plywood diaphragm on top of the existing adobe walls may remain and the new roof will be constructed on top of the plywood diaphragm. Braces and other temporary members installed for the move will be removed. The building will be made stable and watertight, which may require some patching of the exterior plaster surfaces damaged during the move, however no further restoration work will be completed at this time. Additionally, the site areas around the building will be patched back in, but no new site improvements (patios, new landscape areas, etc) will be constructed.
22. Back at the High School site, the site area remaining after the adobe is removed will be leveled and capped with either asphalt or concrete. The fence on top of the retaining wall between the pool and the adobe site will remain during construction, except as removed and reinstalled to accommodate the building move. Other than this fence, the paved area where the adobe was located will be open to the rest of the campus. The new paved area shall be designed in such a way as to provide for drainage so as not to collect or pond water. The existing monument shall remain and be incorporated into the site area.

MICHAEL WHITE ADOBE AT SAN MARINO HIGH SCHOOL

CONSTRUCTION STEPS FOR UPGRADING ADOBE IN PLACE FOR USE BY STUDENTS (Per Title 24 & DSA Standards)

1. The following description is based on the sketch prepared by Michael Krakower, dated June 23, 2009, entitled "DSA STABILIZE IN PLACE ALT", copy attached.
2. The preliminary cost estimates will be based on prevailing wage labor rates, and will assume normal working hours and shifts.
3. There will be an Archaeological Monitor and/or Historical Monitor present during the upgrading of the adobe.
4. Demolition shall be with rotary non-impact type equipment only. Impact type tools are not permitted.
5. The roof will be removed and discarded. New ceiling joists with a new plywood diaphragm and new roof will be installed, which will be attached to the existing adobe rod through the use of vertical anchors inserted down into the adobe walls. The new roof will be a shake roof (over plywood) to match that of the existing roof being removed.
6. The assumption is that the existing adobe walls have no structural integrity or value. The adobe walls will be encapsulated and structurally stabilized by installing two stud framed walls, one on each side of the existing adobe walls, with plywood on each side of the new stud walls. In order to prevent crushing or damaging the adobe, there should be a compressible layer of material between the encapsulating plywood sheathing and the plaster of the adobe. One method might be by fastening batt insulation to the adobe prior to the plywood sheathing. Gypsum board will be installed over the plywood on the interior face and will be finished with plaster like finish. Lath and plaster will be installed on the plywood on the exterior face, with a finish to resemble that of the original adobe.
7. A new concrete footing will be installed to support the new stud walls on both sides (interior and exterior) of the existing adobe walls at the building perimeter. These new footings will be installed alongside the existing footing (believed to be cobble) supporting the existing adobe walls.
8. Existing window and door openings will be removed and replace as necessary – many of these are out of square and have some dry rot. Doors and window units may need to be replaced. Door hardware shall be ADA compliant for the main entry door and at doors between rooms. Any door openings less than 30" in width may be required to be widened for ADA access.

9. Since the existing toilet is quite small, and since it is not original, it would make sense to remove the existing toilet rather than trying to make it ADA compliant. The toilet room could be converted to a small storage room. Accessible restrooms will be identified for use in nearby adjacent buildings. (A path of travel to these restrooms will be required.)
10. The interior surfaces which are not covered by the new encapsulating walls will need to be patched and the interior will be completely prepped and painted.
11. The exterior exposed wood framing at the porch, door or window openings, or any other areas not covered by new construction at the walls or roof will need to be prepped and stained. Any members which have dryrot damage should be removed and replaced. All new plaster wall surfaces will be prepped and painted.
12. Fire Sprinklers: Will not be required.
13. Fire Alarm: An automatic, stand alone fire alarm system will be installed.
14. Other Electrical: Provide adequate power outlets, lighting, telephone, Public Address speakers and data outlets tied to school network and public address system. Remove all obsolete lighting and power currently installed.
15. HVAC: The existing adobe does not have heating or cooling. Some sort of heating and air conditioning (or at a minimum, ventilation through the use of operable windows) needs to be provided.
16. Site Upgrades:
 - a. If existing tube steel fence is to remain, the gates will need to be made ADA compliant (retrofitted with lever hardware). The fence could be removed on the North and East sides of the adobe.
 - b. Existing trees at the North side may need to be removed or trimmed to allow for the work at the roof level.
 - c. Existing site improvements disturbed by the installation of the new foundations will need to be restored.
 - d. Existing landscaping and irrigation should be modified and/or upgraded. Landscaping should be located away from adobe walls to keep moisture away from exterior walls.
 - e. The main entry ramp will need to be modified if it is not ADA compliant. It is not known without shooting grades if the existing ramp is less than 1:12.
 - f. In order to create an accessible path of travel to the south, to the main building campus and to the accessible restrooms in the Gym Bldg. or at the Science Bldg. S, the existing stairs and sidewalk (east and just south of the

adobe) will need to be removed and replaced with an ADA compliant ramp approximately 65-70 ft. long.

- g. ADA compliant parking will be identified as the existing ADA parking at the Gym Circle, south of the Gym building. The path of travel to the adobe will be from the south, via the new ramp discussed above.
- h. ADA compliant room, entry, and path of travel signage will need to be installed.

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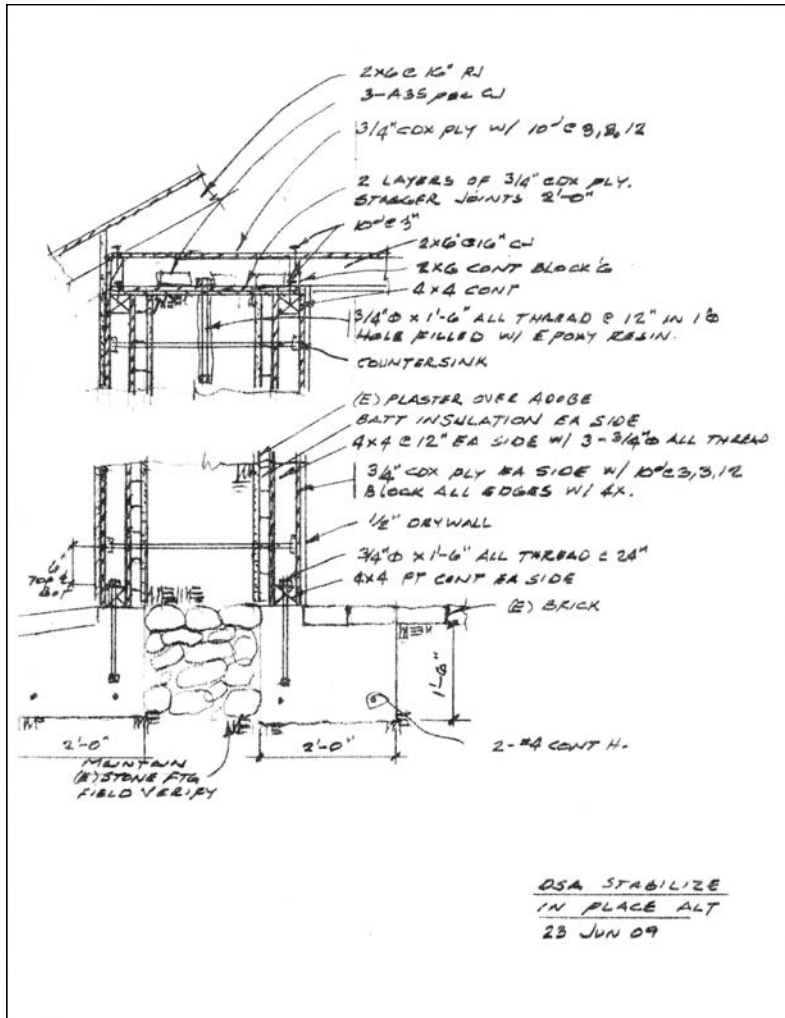


Figure 84: Sketch detailing DSA stabilization option, June 23, 2009. (Drawing prepared by Michael Krakower)

Figure 85: Division of the State Architect requirements for converting existing non-conforming buildings for school use

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REHABILITATION OF EXISTING
NON-CONFORMING BUILDINGS FOR
PUBLIC SCHOOL AND CALIFORNIA
COMMUNITY COLLEGE USE

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TABLE OF CONTENTS

Just click on the article you want to see

Acronyms and Definitions

1. Building Selection

- 1.1. Owner Initial Facility Assessment
- 1.2. Applicability of Regulations

2. Pre-Application Procedure

- 2.1. Design Professional Tasks
- 2.5 Owner's Independent Structural Peer Reviewer Tasks

3. Design Development Phase

- 3.1. Design Professional Tasks
- 3.4. Owner's Independent Structural Peer Reviewer Tasks

4. Construction Document Phase

- 4.1. Design Professional Tasks
- 4.4. Owner's Independent Structural Peer Reviewer Tasks

5. Project Application Submittal

- 5.1. Design Professional Tasks

6. Plan Review, Construction Review and Project Certification Procedures

- 6.1. Design Professional Tasks
- 6.4. Owner's Independent Peer Reviewer Tasks (when consulted)

APPENDICES

Just click on the Appendix or Form you want to see

General

- A. Specifications for Electronic File Format
- B. Online (Fully Electronic) Submittal Process

Accessibility (AC)

- C. Requirements for the Evaluation & Design Criteria Report - Accessibility Chapter
- D. Provisions for Access Compliance Design, Review and Approval for Rehabilitation of Existing Non-Conforming Buildings, Sites, and Facilities for Use as Public Schools

Fire and Life Safety (FLS)

- E. Requirements for the Evaluation & Design Criteria Report – Fire Life Safety Chapter
- F. Provisions for Fire and Life Safety Design Review and Approval for Rehabilitation of Existing Non-Conforming Buildings for Use as Public Schools

Mechanical, Plumbing and Electrical (ME, PE, EE)

- G. Requirements for the Evaluation & Design Criteria Report - Mechanical, Plumbing and Electrical Building Systems, Equipment and Devices Chapters
- H. Data Collection for Site and Building Systems, Equipment and Devices Proposed for Continued Use
- J. Policies and Provisions for Design and Approval of Mechanical/Plumbing Systems and Equipment for the Rehabilitation of Existing Non-Conforming Buildings for Use as Public Schools
- K. Policies and Provisions for Design and Approval of Electrical Systems and Equipment for the Rehabilitation of Existing Non-Conforming Buildings for Use as Public Schools

Historic School Program

- L. Requirements for the Evaluation and Design Criteria Report - Rehabilitation of Historic Buildings for Public School Use
- M. Provisions for the Rehabilitation of Historic Buildings for Public School Use

Forms

- Pre-Application Form

ACRONYMS AND DEFINITIONS

ACRONYMS

ABS	a type of plastic pipe
ACS:	Access Compliance Safety
BMP	standard bit-mapped graphics file storage format used in the Windows environment.
CAD	Computer-aided design; a CAD system is a combination of hardware and software that enables engineers and architects to design products on-line.
CBC	California Building Commission
CBSC	California Building Standards Code
C.C.R.	California Code of Regulations (California Building Code, Title 24, Part 2)
CD	Compact Disc; a type of optical disk capable of storing large amounts of data
CD-ROM	Compact Disc-Read-Only Memory.
CHBC	California Historical Building Code
C.P.C.	California Plumbing Code
DGN	File extension for a CAD file
DOC	File extension for a Microsoft Word file
DSA	Department of General Services, Division of the State Architect
DSA-HQ	Division of the State Architect Headquarters; 1102 Q St, Sacramento, CA 95814.
DWV	Refers to Schedule 40 DWV ... plastic pipe
DXF	Data Exchange File; a two-dimensional graphics file format supported by virtually all PC -based CAD products. It was created by AutoDesk for the AutoCAD system.
EE	Electrical Engineer
FLS	Fire and Life Safety
FTP	File transfer protocol; web-based portal to the DSA-IMS
HSP	Historic School Program
HSR	Historic Structures Report
IMS	Information Management System (the DSA document and storage retrieval system)
IR	DSA Interpretation of Regulations
JPEG	Joint Photographic Experts Group; a data compression technique for color images.
ME	Mechanical Engineer
PCB	Any of a family of industrial chemical compounds produced by chlorination of biphenyl noted as an environmental pollutant.
PDF	Portable Document Format, desktop application making it possible to send formatted documents that appear on the recipient's monitor or printer as intended.
PVC	a type of plastic pipe
SHBC	State Historical Building Code
SSS	Structural Safety Section
TIFF	Tagged image file format; for storing bit-mapped images on personal computers.
USPI	Uniform Standards and Procedures Initiative
WPD	File extension for a Word Perfect file
Xrefs	External references to a CAD file

DEFINITIONS

AutoCAD, DataCAD Plus, VectorWorks: These are various CAD applications.

DSA Peer Review: A review of the Report by a DSA consultant who acts as an advisor to the DSA for the evaluation of specific proposals within the Report.

DSA Peer Review Consultant: A DSA consultant selected from an approved consultant list to assist with evaluation of specific proposals in the Report. The DSA Peer Reviewer is not to be confused with the Owner's Peer Reviewer (see entry below) who is selected independently at the owner's discretion.

eTransmit: Refers to electronic file transfers.

Evaluation and Design Criteria Report: Also known as "the Report," this comprehensive document establishes the criteria for evaluation and design to be used by the project design professionals and by DSA staff during the project plan review. The Report establishes criteria for structural, fire and life safety, accessibility, mechanical, electrical and historical disciplines of construction. See Appendices C-M for detail.

Interpretation of Regulations (IR): A series of publications by the DSA intended for use by the plan review and field engineers of the DSA to indicate an acceptable method for achieving compliance with applicable codes and regulations.

Owner's Peer Review: An independent review of the evaluation and design criteria proposed by the project design professionals for the development of the Evaluation and Design Criteria Report in accordance with the requirements of Division VI-R, Title 24, C.C.R.

Owner's Peer Reviewer: A consultant hired by the owner, distinct from the project design professionals, to provide independent review and commentary on the design criteria in accordance with the requirements of Division VI-R, Title 24, C.C.R.

Read me file: A file that a submitting architect will send along with their drawings that provides file details like plot sizes for CAD files.

Rehabilitation Coordinator: Lead for the DSA in promoting consistency in implementation of the regulations and procedures for the rehabilitation of non-conforming existing buildings into school buildings; provides a knowledge/experience base in rehabilitation technologies, methodologies and retrofit materials when collaborating with or providing guidance to the DSA Regional Offices and Peer Review Consultants reviewing Evaluation and Design Criteria Reports; may attend preliminary meetings at the regional offices; leads group discussion with Supervising Structural Engineers, reviewers and Product Approval personnel at the DSA-HQ utilizing USPI processes to promote consistent application and evaluation of alternate materials; provides final recommendation to the Regional Manager for resolution of disagreement between clients, Peer Review Consultants and/or reviewers.

Supervising Structural Engineer: DSA Regional Office Supervisor overseeing construction project package submittals and processing.

Transition: Process by which a project is changed from one state to another. Example: A project can transition from an Intake Professional to a Supervising Structural Engineer.

Preface: For the purposes of this document, references to “public school”, “school building” and “school site” shall be intended to include California public schools, Kindergarten through 12th grade, charter school entities and California Community Colleges.

1. **BUILDING SELECTION**

1.1 **Owner's Initial Facility Assessment**

It is the responsibility of the owner and their project team to initially assess any non-conforming site and facility being considered for rehabilitation to public school use. Initial facility and site assessment should be performed by California licensed design professionals, architects and engineers specializing in structural, fire/life safety, accessibility, mechanical, plumbing and electrical disciplines, who are knowledgeable in rehabilitation of existing structures and familiar with the design and construction of California public schools and community colleges. Likewise, when historical buildings are being considered, assessment should be performed by California licensed design professionals who are knowledgeable in preservation of existing historical structures. Owners are advised to refer to the Division of the State Architect (DSA) feasibility guideline *Adaptive Reuse: An Option for California's Schools* as an assessment tool along with other methods recommended by their design professionals. The guideline can be found on the DSA Webpage at:

http://www.documents.dgs.ca.gov/dsa/pubs/feasibility_guidelines_pub_dsa_reh_01.pdf

1.2 **Applicability of Regulations**

The regulations of Title 24, C.C.R. apply to any existing non-conforming building for purchase or lease by a district for use as a public school building or by a charter school entity for use as a charter school building required to comply with the Field Act.

The regulations of Title 24, C.C.R. may be utilized for California Community College buildings when:

- 1) DSA approval of the plans/specifications and certification of construction is required by the Education Code;
- 2) DSA approval is requested by the district for rehabilitation of any existing non-conforming building for purchase or lease for use as a California Community College school building.

NOTES: Section 81149 of the Education Code remains in effect for qualifying buildings and is not superceded by these regulations. All references to California Building Code (CBC) sections are to Title 24, Part 2, C.C.R. unless indicated otherwise.

The regulations prescribed in Sections 4-306 and 4-307 of Part 1, Title 24, C.C.R., are not required for seismic retrofit of existing certified school buildings when the rehabilitation is being constructed voluntarily by the district, and when the provisions of Section 4-309(c) that require structural rehabilitation are not met. However, these regulations and procedures may be utilized for any voluntary rehabilitation, thereby providing a standard to which the construction can be certified.

2. **PRE-APPLICATION PROCEDURE**

For each rehabilitation project, an Evaluation and Design Criteria Report (hereafter referred to as the **Report**) shall be prepared and shall include chapters for each of the disciplines of building construction: structural, fire/life safety, accessibility, mechanical, plumbing and electrical. When applicable, the Report shall include a chapter for historic buildings. The Report, to be approved by the DSA, establishes:

- 1) the criteria for the evaluation and design to be used by the project design professionals;
- 2) the material/system/equipment testing and condition assessment requirements.

Summary of Fees (fully defined in the following procedures):

- 1) Retainer fees will be required with submittal of a project Pre-Application;
- 2) DSA will prepare and submit to the applicant a cost estimate to complete full review of the Report for all disciplines, including consultants. Review will commence upon receipt of payment. Any estimated fees not expended in review shall be refunded to the applicant upon approval of the Report;
- 3) DSA may invoice for further fees if costs for review of the Report significantly exceed the estimated fees;
- 4) DSA may invoice for further fees if changes to the approved Report require significant further review for approval.

2.1 **Design Professional Tasks**

2.1.1. Historic Building Site Determination. Owner/design professional may determine whether the proposed facility is a registered historic building or site; if historic, the procedures specified in Appendices L and M shall be followed.

2.1.1.1. Per the procedures of Appendix M, the architect or owner's representative shall:

- 1) Contact the DSA Supervising Structural Engineer to notify the DSA of the historic project proposal,
- 2) Discuss requirements for a preliminary Historic Structures Report (HSR),
- 3) Schedule an appointment with the DSA Supervising Structural Engineer and the DSA Historic School Program Manager for a pre-Report consultation meeting to discuss use of the State Historic Building Code (SHBC).

2.1.1.2. A preliminary HSR (2 paper copies or electronic file) shall be submitted to the DSA Regional Office Supervising Structural Engineer per Appendix L prior to the pre-Report consultation meeting.

2.1.1.3. Conduct a pre-Report consultation meeting with the DSA Supervising Structural Engineer and the DSA Historic School Program Manager.

2.1.2. Initial Evaluation. Consult with project structural, mechanical, electrical engineers and specialty consultants, as appropriate, to conduct an initial evaluation of the building and develop a retrofit scheme for the analysis and design of the building.

2.1.2.1. Selection of structural rehabilitation methodology:

The structural engineer shall propose the method of structural evaluation and design as defined in Division VI-R, which includes Method A, Method B and the current effective edition of the CBC.

2.1.2.2. When Method B for structural rehabilitation is utilized:

The owner shall contract with an independent structural Peer Reviewer (consultant) to provide subject matter expertise to the design team in accordance with Section 1649A, Division VI-R.

2.1.2.3. The architect or owner's representative may request a preliminary meeting for any rehabilitation project involving Methods A or the CBC and shall schedule an appointment for any rehabilitation project involving Method B with a structural engineer, the Owner's independent structural Peer Reviewer and a DSA representative for a pre-Report consultation meeting discussing and establishing:

- Scope of work for the rehabilitation of the building and site for all disciplines.
- Appropriate structural evaluation and design methodology.
- Scope of work of the Owner's independent structural Peer Reviewer.

2.1.3. Evaluation and Design Criteria Report. The Report shall propose criteria for rehabilitation of the structural, fire life-safety (FLS), accessibility (ACS), mechanical, plumbing and electrical disciplines, and criteria for historic buildings when applicable. (For structural, see Section 1640A.8.2, Division VI-R; for FLS, ACS, mechanical, plumbing, electrical, and historic, see Appendices C-M.)

2.1.3.1. When Method B for structural rehabilitation is utilized, the Owner's independent structural Peer Reviewer shall review the Report and prepare a report on his/her findings and the proposals; see Section 1640A.8.3, Division VI-R.

2.1.4. Project Pre-Application. Begin the Pre-Application process included in the Report per one of the two processes described below. Both processes utilize a web-based FTP site as a portal to the DSA-IMS system which will provide communication between the DSA and design professionals. Notifications will be provided by the DSA-IMS system at specific milestones.

2.1.4.1. Semi-electronic Submittal Process:

Submit to the DSA Regional Office a Pre-Application (DSA-1 REH); pre-application retainer fees; and provide an electronic file (on CD) that includes the following:

- The Report electronically signed by the design professional in responsible charge of the design;
- Existing plans and specifications (or as-built plans);
- Available construction documents including test and inspection reports and
- Any change documents.

See Appendix A for specifications on formatting the electronic files on CD.

Upon notification by the system, the design professional uses the Login and Password information provided by the DSA to retrieve from the FTP system online:

- The DSA approved Report; or
- DSA recommendations to the Report that will require response.

The DSA will register the design professionals and owner's representatives into the IMS and notify them that the project is ready to proceed.

2.1.4.2. On-line (Fully Electronic) Submittal Process:

The online submittal process requires that the design professional registers his/herself and the project on FTP. The registration process establishes the Login and Password into the system, the Pre-Application number for the project, and file folder into which the project files are to be uploaded.

See Appendix A for specifications on formatting the electronic files.

See Appendix B for the online, fully electronic, process.

Upon notification by the system, the design professional uses the Login and Password information to access the FTP system online for retrieval of:

- The DSA approved Report; or
- DSA recommendations to the Report that will require response.

Mail a paper copy of the Pre-Application and the retainer fee to the Cashier at the DSA Regional Office, or submit the retainer fee through the Electronic Funds Transfer (EFT) process (contact the DSA-HQ Accounting Office, (916) 445-8100, for information).

2.1.5. Initial Fees Review. Upon receipt of the Pre-application, the DSA Supervising Structural Engineer will assess the workload scope for review of the Report by all disciplines and, if greater than the initial retainer fee, provide an invoice for any additional estimated fees for the complete review. The applicant shall provide the additional estimated fee prior to start of the Report review. For information regarding Electronic Funds Transfer (EFT) process, contact the DSA-HQ Accounting Office.

2.1.6. Final Fees Review. When all aspects of the Report have been reviewed and the Report is ready for Supervising Structural Engineer's approval, the DSA may invoice any final fees incurred above the initial retainer and estimated fees, for the complete review of all disciplines of the Report. If estimated fees exceed the final fees by more than \$25.00, then the DSA will refund the difference. **Final fees must be received by the DSA prior to approval of the Report.**

2.1.7. Returned Report. If the DSA does not approve the Report as proposed and returns the Report with recommendations for response, the design professional shall:

- 1) Make amendments to the Report as appropriate, and
- 2) Return amended Report to the DSA reviewer for approval.

Repeat steps 2.1.2.1 (if necessary), 2.1.3 and 2.1.4 until the DSA approval is achieved.

2.1.8. Approved Report. Upon receipt of a DSA approved copy of the Report, design development of the project may begin, as directed by the owner.

2.5 Owner's Independent Structural Peer Reviewer Tasks

When Method B for structural is used, the Owner's independent structural Peer Reviewer shall review the design professional's Report, provide guidance to the design team and prepare an independent report in accordance with Section 1640A.8.3, Division VI-R.

3. DESIGN DEVELOPMENT PHASE

3.1 Design Professional Tasks

3.1.1. Analysis Methods. Conduct analyses compliant with the methodologies defined in the approved Report.

3.1.2. Changes to Approved Criteria. If changes to the approved criteria are necessary, submit an electronic file of the specific amended section(s) of the Report to the DSA for approval. Amendments shall be clearly identified with the amendment date and a sequential amendment identification/reference number; and shall be electronically signed by the design professional in responsible charge. The DSA may charge fees incurred for review of changes.

3.1.2.1. When Method B for structural is used, changes to the approved Report shall be reviewed by the Owner's independent structural Peer Reviewer, and a supplemental report shall be provided addressing the change similar to Section 2.1.2.1.

3.4 Owner's Independent Structural Peer Reviewer Tasks

- When Method B for structural is used, the Owner's independent structural Peer Reviewer shall: Review the design development progress and structural calculations for conformance with the approved design criteria defined in the Report,
- Prepare a report in accordance with Section 1640A.8.3, Division VI-R.

If changes to the approved criteria are required, the changes to the approved Report shall be reviewed and a supplemental report provided addressing the change (similar to Section 2.5).

4. CONSTRUCTION DOCUMENT PHASE

4.1 Design Professional Tasks

4.1.1. Complete design and construction documents in compliance with approved Report.

4.1.2. Changes to approved criteria. If changes are necessary, submit an electronic file of amendments in accordance with Section 3.1.2.

4.4 Owner's Independent Peer Reviewer Tasks

When Method B for structural is used, the Owner's independent structural Peer Reviewer shall review the construction documents prior to submittal of the project to the DSA for plan review for conformance with the approved design criteria defined in the Report, and prepare a report in accordance with Section 1640A.8.3, Division VI-R.

4.4.1. Changes to approved criteria. If changes are necessary, see Section 3.4.1.

5. PROJECT APPLICATION SUBMITTAL

5.1. Design Professional Tasks

Prepare project application package and submit to the appropriate DSA Regional Office: project application, plans and specifications, existing construction documents (as-built plans) not previously submitted, reports from tests and investigations as required by the approved Report; Fees in accordance with Part 1, Title 24, for a new building.

6. PLAN REVIEW, CONSTRUCTION REVIEW AND PROJECT CERTIFICATION PROCEDURES

6.1. Design Professional Tasks

Obtain approval of project plans and specifications, and all changes to project plans and specifications during construction; submit required documents for project certification in accordance with Part 1, Title 24, for a new building.

6.1.1. If change(s) to the approved structural criteria — as incorporated into the approved plans and specifications — are necessary during construction, the Owner's independent structural Peer Reviewer shall review the change.

6.4. Owner's Independent Peer Reviewer Tasks (when consulted)

If changes to the approved structural criteria, as incorporated into the approved plans and specifications, are necessary during construction, the Owner's independent structural Peer Reviewer shall review the change and provide a report in accordance with Section 1640A.8.3, Division VI-R.

SPECIFICATIONS FOR ELECTRONIC FILE FORMAT

APPENDIX A

TECHNICAL REQUIREMENTS FOR SUBMITTING ELECTRONIC FILES

A.1. - File Format:

- CAD Drawings:

DWG for *AutoCAD*, DGN for *Microstation*, non-AutoCAD users (e.g. *DataCAD Plus*, *VectorWorks*) are to export drawings into DWG or DXF format.

Translation into DXF may lead to incompatibility and other performance issues. For more information, the white paper by OpenDWG Alliance is available at: <http://www.opendwg.org/about/whypaper/whynot.htm>

- Images (Scans):

TIFF, JPEG and BMP for image files and reference drawings.

- Other Document Formats:

PDF (preferred choice), DOC, WPD for specifications, calculations, soil reports, etc.

A.2. - Packaging Electronic Information: CD or FTP

- For FTP & CD, the files should be compressed by WinZip. This reduces the collective size of transferred files and makes submittal a single file transfer. For submittal with CD, ensure the CD is unlocked and is readable by any standard CD-ROM drive.
- *AutoCAD* users can use the "eTransmit" feature to pack the drawings and all associated files into a self-extracting executable compressed transmittal set. (For eTransmit, enable the command on "remove paths from Xrefs and images.")

A.3. - Font, Typeface (CAD Submittals):

Submit all custom fonts and any non-standard fonts.

User may submit a font-mapping file to identify any alternate substitution.

A.4. - Xref (CAD Submittals):

Bind all external references to the drawing.

All Xrefs such as title block, keynotes and legends are to be bound.

A.5. - Layers And Scaling (CAD Submittals):

Flatten all layers on all images files.

Paper space strongly recommended on all drawings to be reviewed by the DSA.

A.6. - List Of Content And Files Organization (CAD Submittals):

Provide an index file and organize drawings into folders such as Architectural, Structural, Electrical and Mechanical.

A simple read me file should be submitted to clarify the title of all drawings, the file naming convention and any unusual settings or special instruction to download. Each drawing is to be contained in one file.

A.7. - Plotting Instruction (CAD Submittals):

Description of pen setting and page set-up.

A simple "read me" file to explain the plotting configuration or if certain layers should be turned off. Indicate the use of any required object enabler.

**APPENDIX B
ONLINE (FULLY ELECTRONIC) SUBMITTAL PROCESS**

Phase 1: REGISTER A REHABILITATION PROJECT ONLINE

To submit a Pre-Application (Pre-App) online, an architect goes to Internet site www.dsa.dgs.ca.gov and clicks Pre-App link.

If the architect calls a DSA Regional Office, he/she will be directed to this link.

- 1- Registering for online submittal (required for each project). This can be accomplished by calling 916.322.3727 or going to www.applications.dgs.ca.gov/dsa/preapp/step1a.asp and filling out the registration form. A return email address is **mandatory** for all online submittals.
- 2- Following registration, an email will be sent out to the address provided in the registration form. This email will include:
 - a. A phone contact 916.445.6944 to schedule web based training on the system.
 - b. Web location for do-it-yourself instructions on how to upload and download files.
 - c. Instructions on how to prepare files for submittal to DSA.
 - d. Login and password for the system.

Phase 2: SUBMIT PRE-APPLICATION & UPLOAD FILES

This is the Pre-Application form in PDF format. (Form only)

Architect collects all documents he/she will submit in a single folder so that upload to DSA is simplified.

FTP is an existing application on the Internet for file transfers.

- 1- Go to www.dsa.dgs.ca.gov/forms and click Pre-Application. Fill out the Pre-Application (Pre-App), sign the form using an Entrust digital signature, and save the original Pre-Application to your local PC.
- 2- Move electronic copies of plans or scanned images of plans, Pre-Application report, specifications, construction documents, test and inspection reports and the Evaluation and Design Criteria Report (the Report) electronically signed by the design professional, into a folder on your local PC.
- 3- Log into ftp://dsafthq.dgs.ca.gov, using the login and password provided at time of registration. Upload above files into established Pre-App folder, per the instructions provided in training or in do-it-yourself instructions.
- 4- Mail retainer check to DSA Regional Office with login name in Memo field or do EFT.

The upload folder name will be the same as the Pre-App eTracker number.
An architect with more than one project will have a single login that shows multiple folders. He/she uploads files to the appropriate project.

Phase 3: DSA PROJECT INTAKE

What is Transition?

Transitioning is a process by which a project is changed from one state to another. For example, a project can be transitioned from Intake to the Supervising Structural Engineer.

- 1- When files are uploaded to a folder, email notification is sent to the Cashier at the DSA Regional Office.
- 2- Upon receipt of retainer, the Cashier opens the Pre-Application in ftp://dsafthq.dgs.ca.gov and enters the information into eTracker. Cashier processes check.
- 3- The Cashier clicks the Notify button in eTracker, and the IMS Administrator is notified that a new project is now available for upload.
- 4- The IMS Administrator uploads all files from FTP to the IMS, and transitions. Email notification is sent to the DSA Regional Office Supervising Structural Engineer (SSE) upon transition.

How does one Transition & what happens?

To transition a project between phases, a user "right clicks" the mouse while on the application document and selects "Transition". The next person in the workflow is notified that they now have control of the project. The workflow is defined in the IMS.

Phase 4: PROJECT SCHEDULING

The transition process will provide the SSE with a list of possible staff, contractors and the Rehabilitation Coordinator to whom the project may be transitioned.

The Rehabilitation Coordinator is a role that can be assigned to anyone by the DSA-HQ management. The SSE will just see the role in a dropdown list; the individual who performs this role may vary.

- 1- The SSE reviews the IMS folder and determines:
 - a. If the information provided is adequate to approve the Pre-Application.
 - b. If the project will be reviewed internally or by a contract consultant.
 - c. If the project needs to be elevated to the Rehabilitation Coordinator.
 - d. Whether to prepare an additional estimated fee. If so, notifies Cashier to invoice.
- 2- Cashier invoices for additional estimated fee. Notifies Supervising Structural Engineer upon receipt.
- 3- Once the SSE has made the above determination and estimated fees have been received, then he/she transitions the project to the appropriate reviewer next in the workflow (plan review staff, Rehabilitation Coordinator or DSA Peer Review Consultant). The SSE selects from a list of plan review staff, the Rehabilitation Coordinator and contract firms.
- 4- When a Peer Review Consultant is assigned, the IMS Coordinator is notified so he/she can register the consultant and grant them rights to FTP for this project, i.e., the login and password to the system and the project Pre-App number.

Notification is sent "FYI" to the Rehabilitation Coordinator.

Phase 5a: PRE-APPLICATION REVIEW BY THE DSA

- 1- Report reviewer gets email notification and clicks on the link in the notification to go to the required folder in the IMS.
- 2- Reviewer evaluates report, interacting with Rehabilitation Coordinator and/or the DSA Peer Review Consultant as necessary (see Phase 5b).
- 3- Upon completion, reviewer returns all comments to the design professional directly via email or transfer through IMS/FTP.
- 4- Design professional addresses comments and returns to DSA, via email or transfer through FTP into IMS.
- 5- On conclusion of the review process, structural reviewer verifies all disciplines are complete and transitions the project to the next phase. Each reviewer updates status and inputs time spent in eTracker Status screen. Structural reviewer inputs consultant status and time.

Phase 5b: PRE-APP REVIEW BY DSA PEER REVIEW CONSULTANT

- 1- Upon transition by the SSE, the DSA Peer Review Consultant is notified of the project via email.
- 2- The consultant contacts the SSE and goes through the contracting amendment process.
- 3- The consultant logs into ftp://dsafthq.dgs.ca.gov and downloads the project files (using pre-assigned login and password).
- 4- The DSA Peer Review Consultant evaluates report, interacts with SSE, Rehabilitation Coordinator and/or Regional Office Reviewer, and makes recommendations to the DSA through email or transfer through the IMS.

Phase 6: SSE REVIEW AND APPROVAL OF REPORT

- 1- Structural reviewer notifies the SSE that the Pre-Application Report is ready for approval. (Notification is sent when the SSE transitions the project out of review)
- 2- The SSE logs into the IMS, performs a summary review of the work, and if acceptable:
 - a. Notifies Cashier to prepare Actual Fee Worksheet and determine if final fees are required. If so, Cashier invoices applicant.
 - b. Upon receipt of final payment, Cashier notifies SSE.
 - c. Applies an electronic Approved stamp and digital signature to the Pre-Application Report;
 - d. Transitions the project to the approved state.
- 3- Transition sends email to the IMS Administrator who moves the final documents to the external folder in FTP and transitions the project for return to the architect.

Phase 7: RETURN OF APPROVED REPORT

- 1- The architect and owner's representative may receive final invoices when the Report is ready for approval. The DSA will only approve the Report upon receipt of final payment.
- 2- Upon approval, the architect and owner's representative receive email notification that a Pre-App Report has been approved and is ready for retrieval from FTP.

REQUIREMENTS FOR THE EVALUATION AND DESIGN CRITERIA REPORT – ACCESSIBILITY CHAPTER

APPENDIX C

C.1 - Procedures for DSA Approval of the Evaluation and Retrofit Design

During the schematic phase of the project, the owner or the design professional in responsible charge of design shall perform initial data collection and assessment of the building and prepare and sign an Evaluation and Design Criteria Report for Accessibility. The Report shall establish the design criteria for the rehabilitation by identifying deficiencies in the existing conditions and propose remediation in compliance with Title 24 accessibility regulations as defined in Appendix D. The Report shall be submitted to the DSA for review and approval of the proposals prior to proceeding with design development of the rehabilitation. The DSA shall review the Report to determine that each item identified in this Appendix has been satisfactorily addressed. If the DSA determines that one or more items are not satisfactorily addressed or the DSA does not concur with any of the proposals, the Report shall be returned to the design professional for correction. Upon concurrence that all items have been satisfactorily addressed by the proposals in the Report, the DSA shall approve, sign and return a copy of the signed Report to the owner.

If changes to the approved criteria are determined to be necessary during design development and completion of construction documents, the project design professional shall submit an amendment to the Report for the particular discipline to the DSA for approval.

Upon completion of the design, the plans and specifications shall be submitted to the DSA for approval per the provisions of Part 1, Title 24.

C.2 - Initial data collection and assessment

Initial data collection and assessment shall include:

1. Visit(s) to the sites, buildings and facilities.
2. Data collection, analysis and evaluation of existing site, building and facility conditions in accordance with Appendix D.
3. Review of original plans, specifications and associated construction documents. Where original building and site plans and specifications are not available, "as-built" plans shall be prepared that accurately depict the existing building and site.

C.3 - Evaluation and Design Criteria Report

The Evaluation and Design Criteria Report shall include a chapter for accessibility, be signed by the design professional in responsible charge of the design, and shall:

1. Identify and document all elements of the site, buildings, and facilities, or portions thereof, which do not fully comply with the Title 24 accessibility regulations as required for new construction in accordance with Appendix D.
2. Where elements of the buildings, sites, or facilities, or any portion thereof do not fully comply with Title 24, indicate the proposed method for remediation of the deficiency.
3. Identify any additional data collection and condition assessment to complete the design. Identify locations and specific elements for the additional assessment.

Submit with the Evaluation and Design Criteria Report:

Approved or "as-built" building plans, specifications and associated construction documents that accurately depict the existing construction related to accessibility.

PROVISIONS FOR ACCESS COMPLIANCE DESIGN, REVIEW AND APPROVAL FOR REHABILITATION OF EXISTING NON-CONFORMING BUILDINGS, SITES, AND FACILITIES FOR USE AS PUBLIC SCHOOLS

APPENDIX D

D.1. - General.

(a) A site, which is not currently a school site, on which one or more non-conforming buildings exist, shall be rehabilitated for use and considered to be a new school site for application of accessibility regulations contained in Title 24, California Code of Regulations, currently effective edition (herein referred to as "Title 24"). All existing buildings, sites, and facilities at a new school, regardless of use, shall be rehabilitated for accessibility. Such rehabilitation shall be reviewed and approved by the Division of the State Architect/Access Compliance (DSA/AC).

Reference: Title 24, Part 1, Chapter 4, Sections 4-302 and 4-307(a) & (b); Chapter 5, Sections 5-101, 5-102, 5-109, and 5-110.

(b) Rehabilitation of any new school, including all buildings and facilities, shall comply with the regulations adopted by the DSA/AC which are contained in Title 24, currently effective edition.

Reference: Title 24, Part 1, Chapter 4, Sections 4-302 and 4-307(a) & (b); Chapter 5 Section 5-101.

D.2. - Scope.

These provisions shall apply to all buildings, sites, and facilities (including temporary and emergency buildings and facilities) utilizing state funds, county, or municipal funds, or the funds of any political subdivision of the state, for the rehabilitation of any elementary school, secondary school, or community college including the University of California, the California State University, and the various community college districts.

Reference: Title 24, Part 1, Chapter 4, Section 4-307(a) & (b); Chapter 5, Section 5-101; Title 24, Part 2, Chapter 1, Section 101.17.11; Government Code 4451(e).

D.3. - Application of State Building Standards for Accessibility.

When applying accessibility building standards per Title 24, all existing non-conforming buildings, including related sites and facilities that are rehabilitated, regardless of use, are considered to be new construction, and shall fully comply with all accessibility regulations as required for the construction of new buildings, sites, and facilities as contained in Title 24, currently effective edition. Since rehabilitation projects are considered new construction, Title 24, Part 2, Chapter 11B, Section 1134B for existing buildings does not apply.

Reference: Title 24, Part 1, Chapter 4, Section 4-307(a) & (b).

D.3.1 - Application of Federal Standards for Accessible Design.

Rehabilitation of buildings, sites, and facilities shall meet or exceed the requirements of Title III, Subpart D of the federal Americans with Disabilities Act of 1990 for new construction including the ADA Accessibility Guidelines for Buildings and Facilities (ADAAG).

Reference: Government Code 4451(d); Title 24, Part 2, Chapter 1, Section 101.17.11.

D.4. - DSA/AC Definitions.

New School Site: location with one or more existing non-conforming buildings not currently a school site.

Non-Conforming Building: any building that (1) has not been rehabilitated for accessibility and approved by the DSA/AC, and (2) exists on a location which is not an existing school site.

Rehabilitation: the accessibility evaluation, report, design, and all construction work —to construct any new elements, or the alteration of any existing elements — required to bring the buildings, sites, and facilities, or portions thereof, into full and complete compliance with the accessibility regulations contained in Title 24, currently effective edition.

D.5. - Accessibility Evaluation

The accessibility evaluation shall include visit(s) to the sites, buildings, and facilities. Data collection, analysis, and evaluation of existing site, building, and facility conditions shall be performed in order to comply with Provision 3.

D.5.1 - Data Collection and Analysis:

(a) In compliance with Title 24 accessibility regulations and in accordance with Provision D.3, the accessibility evaluation shall include (but shall not be limited to) the analysis and evaluation of the following items:

Approach: Off-site paths of travel, on-site paths of travel, parking, passenger drop-off and loading zones, ground surface, walks and sidewalks, curb ramps, pedestrian ramps, stairs, and hazards.

Building Plan/Design: Entrances, horizontal access, vertical access, floors and levels.

Note: new schools are not entitled to elevator exemptions.

Occupancy Requirements: Group A, B, E, H, I, M, and R occupancies, outdoor occupancies, and warehouses.

General Construction Requirements: Bathing and toilet facilities, elevators, special access (wheelchair) lifts, water fountains, telephones, kitchens, swimming pools, signage, employee areas, doors and gates, stairs, ramps, built in seating, tables, counters, vending machines, storage, space allowance and reach ranges, parking structures, turnstiles and pedestrian-controls, corridors, hallways, exterior exit balconies, aisles, areas for evacuation assistance, alarms, controls and operating mechanisms, ATM and point-of-sale machines, floor surfaces.

Reference: Title 24, Part 2, Chapter 11B.

(b) The data collection and analysis of items in Provision D.5.1 (a) shall be utilized to develop an Accessibility Evaluation Report. The Accessibility Evaluation Report shall be submitted with the design documents indicated in Provision 8 and shall be in accordance with Provision D.6.

D.6. - Accessibility Evaluation Report

(a) The Accessibility Evaluation Report shall be based on the data collection, analysis, and evaluation indicated in Provisions D.5 and D.5.1. The report shall identify and document all elements of the site, buildings, and facilities, or portions thereof, which do not fully comply with the accessibility regulations as required for new construction per Provision D.3. Where the Accessibility Evaluation Report indicates that the buildings, sites, or facilities, or any portion thereof do not fully comply with Title 24 per Provision 3, the rehabilitation shall be designed to comply with all accessibility requirements of Title 24, currently effective edition. The Accessibility Evaluation Report shall be the basis for review of plans and specifications submitted per Provision D.8, for the rehabilitation required per Provision D.1.

(b) The design professional in responsible charge of design, shall stamp, sign and submit the Accessibility Evaluation Report to the DSA/AC, along with the other documents required per Provision D.8.

D.7. - Application, Review, and Approval of Drawings and Specifications.

The application, review, and approval of the rehabilitation of non-conforming buildings, sites and facilities shall be in accordance with Title 24, Part 1, Section 5-103, 5-109, and 5-110.

D.8. - Documents: Plans and Specifications.

(a) Documents including plans and specifications for the rehabilitation of any existing non-conforming buildings, sites, and facilities or portion thereof, shall be submitted to the DSA/AC and provide for the design necessary for full compliance with all accessibility regulations contained in Title 24, currently effective edition. The design professional shall indicate the rehabilitation design needed for all elements identified in the Accessibility Evaluation Report per Provision D.6 (a), and shall stamp and sign all rehabilitation plans and specifications.

(b) Plans shall clearly show all elements and features that are required to comply with accessibility regulations to the same degree and level of detail as if they were being submitted as new buildings, sites, or facilities for DSA access compliance review. Plans shall be legible, sufficiently detailed, cross-referenced, and shall have sufficient dimensions to be readily interpreted for DSA access compliance review.

(c) "As-built" documents (plans and specifications) can be submitted, however such documents shall contain the same degree and level of detail as indicated in Provision D.8 (b). The design professional in responsible charge of design shall confirm and certify by stamp and signature that the "as-built" documents accurately and fully depict the existing building, site, and facility conditions related to accessibility. In addition to "as-built" documents, the design professional shall submit plans and specifications per Provision D.8 (a) -(b), to indicate the rehabilitation design needed for all elements identified in the Accessibility Evaluation Report per Provision D.6(a).

(d) Where the original "as-built" building plans and specifications are not available, "as-built" plans and specifications shall be prepared that accurately depict the existing building, site, and facility conditions per Provision D.8 (a) & (b) in order to confirm compliance with the items listed in Provision D.5.1 (a).

Reference: Title 24, Part 1, Chapter 4, Section 4-317; Sections 5-103 & 5-109.

D.9. - Historical Buildings and Properties

The California Building Code (CBC) requires non-conforming buildings converted to school use to fully comply with the current building regulations for new construction. However, the State Historical Building Code (SHBC) — contained in C.C.R., Title 24, Part 8 (reprinted in CBC, Chapter 34, Division II) — requires state agencies to apply the SHBC to qualified historical buildings and properties, at the discretion of the school district or property owner, to preserve the historical significance or character-defining features of the building or property.

Adopted regulations governing construction of new buildings for accessibility for persons with disabilities (regular code) must be applied to existing, non-conforming, qualified historical buildings or properties converted to school use, unless strict compliance with the regular code will threaten or destroy the historical significance or character-defining features of the building or property. If the historical significance or character-defining features are found to be threatened, alternative provisions for access may be applied — pursuant to the SHBC — provided that, in addition to other conditions, sufficient justification is submitted to the DSA to substantiate such alternatives. The proposals, supporting justification, and proposed alternative provisions shall be submitted as a component of the Historic Structures Report outlined in Appendices L and M.

The application of any alternative standards for qualified historical buildings providing accessibility to persons with disabilities — done on a case-by-case or item-by-item basis — shall not be applied to an entire building or structure without individual consideration of each item. This same case-by-case, item-by-item analysis shall also apply to a designated historic site beyond the immediate structure, if these elements are considered an integral part of, and significant to the historic structure or district.

REQUIREMENTS FOR THE EVALUATION AND DESIGN CRITERIA REPORT – FIRE & LIFE SAFETY CHAPTER

APPENDIX E

E.1 - Procedures for DSA Approval of the Evaluation and Retrofit Design

During the schematic phase of the project, the owner or the design professional in responsible charge of design shall perform initial data collection and assessment of the building and prepare and sign an Evaluation and Design Criteria Report. The Report shall establish the criteria for evaluation and design of the rehabilitation by identifying deficiencies in the existing site and building conditions — and any elements intended for reuse — and proposing remediation in compliance with Title 24 regulations and Appendix F. The Report shall be submitted to the DSA for review and approval prior to proceeding with design development of the rehabilitation. The DSA shall review the Report to determine that each item identified in this Appendix has been satisfactorily addressed. If the DSA determines that one or more items are not satisfactorily addressed, or the DSA does not concur with any of the proposals, the Report shall be returned to the design professional for correction. Upon concurrence that all items have been satisfactorily addressed by the proposals in the Report, the DSA shall approve, sign and return a copy of the signed Report to the owner.

If changes to the approved criteria are determined necessary during design development and completion of construction documents, the project design professional shall submit an amendment to the Report to the DSA for approval.

Upon completion of the design, the plans and specifications shall be submitted to the DSA for approval per the provisions of Part 1, Title 24.

E.2 - Initial data collection and assessment

Initial data collection and assessment shall include:

1. Site visit(s) to the building.
2. Data collection of existing site and building(s) fire protection systems, water supply, equipment and devices, access, and methods of egress in accordance with Appendices F and H.
3. Review of original plans, specifications and associated construction documents. Where original building and site plans and specifications are not available, "as-built" plans shall be prepared that accurately depict the existing site and building(s) fire and life safety concerns, per Item 2 above.

E.3 - Evaluation and Design Criteria Report

The Evaluation and Design Criteria Report shall include a chapter for fire and life safety, be signed by the design professional in responsible charge of the design, and shall:

1. Describe the site and building(s) fire protection systems, water supply, equipment and devices, access, and methods of egress in accordance with Appendix F.
2. Identify proposed new systems, equipment and devices for fire and life safety.
3. Identify and describe the physical condition of the existing systems, equipment and devices that will be intended for reuse.
4. Based on data collection and review of original construction documents, identify potential deficiencies in the proposed existing systems, equipment and devices that are intended for reuse; and propose the method for remediation of the deficiencies.
6. Propose the program for additional data collection and condition assessment to complete the design. Identify locations and specific systems, equipment and devices for the additional assessment.

Submit with the Evaluation and Design Criteria Report:

1. Approved or "as-built" building plans, specifications and associated construction documents that accurately depict the existing construction.
2. Available system test reports of the existing construction.

**PROVISIONS FOR FIRE AND LIFE SAFETY DESIGN REVIEW AND
APPROVAL FOR REHABILITATION OF EXISTING NON-CONFORMING
BUILDINGS FOR USE AS PUBLIC SCHOOLS**

APPENDIX F

F.1. - Fire Protection

In accordance with Section 4-307, Part 1, Title 24, C.C.R., an existing non-conforming building rehabilitated for use as a school building is considered, for the purpose of the application of Title 24, to be a new school building. Furthermore, a site, which is currently not an existing school site, on which one or more existing non-conforming buildings are rehabilitated for use as school building(s) is considered to be a new school site for the purpose of application of Title 24. Therefore, such sites and buildings, if rehabilitated for public school use with state School Facility Program (SFP) funds, shall be subject to the Green Oaks Family Academy Elementary School Fire Protection Act (Section 17074.50 of the Education Code). If SFP funds are not utilized for rehabilitation, such sites and buildings shall comply with current code regulations and shall not be subject to the requirements of the Green Oaks Family Academy Elementary School Fire Protection Act.

This means that existing non-conforming buildings rehabilitated for school use with state funds, must be equipped with automatic fire sprinklers and automatic fire alarm and detection systems throughout. With regard to installation of automatic fire sprinklers in existing, unequipped, non-conforming building(s), school districts must evaluate the adequacy of water supply for fire sprinklers, fire hydrant locations and distribution to support fire fighting operations in buildings being considered for conversion to school use. (Refer to Division III, Fire Protection, State Appendix III-AA, Fire-Flow Requirements for Buildings; State Appendix III-BB, Fire Hydrant Locations and Distribution within the California Fire Code, Part 9, Title 24.)

F.2. - Fire Department Access and Egress

Existing, non-conforming buildings or sites rehabilitated for school use require vehicle access from all-weather hard-surfaced (suitable for use by fire apparatus) right-of-way not less than 20 feet in width. Such right-of-way shall be unobstructed and maintained only as access to the public street. Gate entrances to school grounds shall also be provided for entrance by fire apparatus, ambulances and police vehicles. Gate openings shall be of sufficient width to accommodate the emergency vehicles used by the fire protection and law enforcement agencies serving the school. (Refer to Sections 3.05 and 3.16, Title 19.)

F.3. - Location on Property

Existing non-conforming buildings, and/or portions within, to be rehabilitated for school use shall front directly on a public street or an exit discharge not less than 20 feet in width. The exit discharge to the public street shall be a minimum 20-foot wide right-of-way, unobstructed and maintained only as access to the public street. At least one required exit shall be located on the public street or on the exit discharge. (CBC Section 305.3)

School grounds may be fenced and gates therein may be equipped with locks, provided that safe dispersal areas based on 3 square feet per occupant are located between the school and the fence. Such required safe dispersal areas shall not be located less than 50 feet from school buildings. (CBC 1007.3.11)

F.4. - Construction, Height and Allowable Area

Existing, non-conforming buildings being considered for conversion to school use, should be limited to single-story if possible, as school buildings two or more stories in height are required to be a minimum of one-hour fire-resistive construction. The allowable area of a school building is 9,100 square feet for Type V-N construction, which is the most common building construction type. The area or size of a school building may be increased if it is adequately separated by yards, if travel distance to exits is reduced, or if the building is provided with automatic fire sprinklers throughout. (CBC 305.2)

F.5. - Exiting Provisions

In evaluating an existing building for rehabilitation as a public school, all of the exiting provisions for educational occupancies within the current code shall be applied, especially those dealing with one-hour corridors, number and width of exits, and travel distance to exits. However, this list is not all inclusive.

F.6. - Special Provisions

School districts evaluating the rehabilitation of existing, non-conforming buildings for use as primary or elementary schools, should pay close attention to the special provisions of CBC 305.2.3 summarized below.

Rooms used for daycare purposes, kindergarten, first- or second-grade pupils shall not be located above or below the first story.

Exceptions:

1. Basements or stories having floor levels located within 4 feet, measured vertically, from adjacent ground level at the level of exit discharge, provided the basement or story has exterior exit doors at that level.
2. In buildings equipped with an automatic sprinkler system throughout, rooms used for kindergarten, first- and second-grade children or for day-care purposes may be located on the second story, provided there are at least two exterior exit doors for the exclusive use of such occupants.

REQUIREMENTS FOR THE EVALUATION AND DESIGN CRITERIA REPORT - MECHANICAL, PLUMBING AND ELECTRICAL BUILDING SYSTEMS, EQUIPMENT AND DEVICES CHAPTERS

APPENDIX G

G.1 - Procedures for DSA Approval of the Evaluation and Retrofit Design

During the schematic phase of the project, the owner or the design professional in responsible charge of design shall perform initial data collection and assessment of the building and prepare and sign an Evaluation and Design Criteria Report. The Report shall establish the criteria for evaluation and design of the rehabilitation in accordance with Title 24 regulations and Appendices J and K by: 1) identifying deficiencies in the existing site and building conditions and any elements intended for reuse, 2) proposing remediation of the deficiencies, and 3) proposing testing and condition assessment requirements for systems, equipment and devices considered for reuse. The Report shall be submitted to the DSA for review and approval prior to proceeding with design development of the rehabilitation. The DSA shall review the Report to determine that each item identified in this Appendix has been satisfactorily addressed. If the DSA determines that one or more items are not satisfactorily addressed or the DSA does not concur with any of the proposals, the Report shall be returned to the design professional for correction. Upon concurrence that all items have been satisfactorily addressed by the proposals in the Report, the DSA shall approve, sign and return a copy of the signed Report to the owner.

If changes to the approved criteria are determined to be necessary during design development and completion of construction documents, the project design professional shall submit an amendment to the Report for the particular discipline to the DSA for approval.

Upon completion of the design, the plans and specifications shall be submitted to the DSA for approval per the provisions of Part 1, Title 24.

G.2 - Initial data collection and assessment

Initial data collection and assessment shall include:

1. Site visit(s) to the building.
2. Data collection of existing site and building systems in accordance with Appendix H.
3. Review of original plans, specifications and associated construction documents, including systems test reports. Where original building plans and specifications are not available, "as-built" plans shall be prepared that accurately depict the existing building systems.

G.3 - Evaluation and Design Criteria Report

The Evaluation and Design Criteria Report shall include a chapter for each discipline, be signed by the design professional in responsible charge of the design, and:

1. Describe the existing building(s) systems.
2. Identify proposed new building systems, equipment and devices.
3. Identify and describe the physical condition of the building systems, equipment and devices that will be intended for reuse.
4. Propose the methodology for evaluation and design of the building systems for rehabilitation. Include any preliminary calculations for justification.
5. Based on data collection, review of original construction documents, preliminary analysis, and results of any new testing performed, identify potential deficiencies in the proposed existing building systems, equipment and devices intended for reuse, and propose the method for remediation of the deficiencies.
6. Propose the program for additional data collection, condition assessment and system testing requirements to complete the design. Identify locations and specific equipment/devices for the additional tests.

Submit with the Evaluation and Design Criteria Report:

1. Approved or "as-built" building plans, specifications and associated construction documents that accurately depict the existing construction.
2. Available system test reports of the existing construction.

DATA COLLECTION FOR SITE AND BUILDING SYSTEMS, EQUIPMENT AND DEVICES PROPOSED FOR CONTINUED USE

APPENDIX H

H.1 - Data Collection. Data collection shall be performed to determine the "as-built" conditions of an existing building's accessibility, fire and life safety, mechanical, plumbing and electrical systems being proposed for continued use. Knowledge of the existing construction shall be determined for all building systems, equipment and devices applicable to the proposed use of the building. Data collection shall be directed and observed by the project design professional in general responsible charge of the design or the delegated architect/engineer(s) with the appropriate subject matter expertise.

H.2 - Data collection requirements. Information shall be obtained for all building systems, equipment and devices applicable to the proposed use of the building, to the extent possible, from original construction documents including design drawings, specifications, test records and quality assurance reports covering original construction and subsequent modifications to the structure. The information shall be verified, or when missing, determined, by condition assessment and systems testing. Qualified test data from the original construction may be accepted, in part or in whole, by the DSA to fulfill any test requirements. Existing structural framing shall be identified for evaluation by the project architect/structural engineer for gravity and lateral support of the equipment/devices.

H.3 - Condition assessment. Condition assessment is the determination of both physical configuration and physical condition of the building's systems, equipment and devices. Assessment shall be performed by visual inspection of assessable equipment/devices, and may require removal of finish materials or fireproofing or the use of scoping equipment to obtain access. The condition of the existing structural framing shall be verified for support of the equipment/devices.

The minimum number of samples for condition assessment to be performed shall be as required to validate all existing systems, equipment and devices proposed for reuse, including identification of support framing.

H.4 - Systems, Equipment and Device Testing. Existing systems, equipment and devices that are intended for continued use shall be evaluated by standardized or state-of-the-practice test procedures when necessary to validate conformance with performance and safety requirements of current model code, and may include, but not be limited to the following. Testing shall be performed by a DSA approved laboratory or a Nationally Recognized Testing laboratory as appropriate.

Electrical: See Appendix K.

- Panels
- Breakers
- Feeders
- Available Fault Current

Mechanical: See Appendix J.

- Test and balance (pre-test including outside air quantities)
- Duct leakage
- Indoor air quality
- Efficiency for whole building by qualified energy auditor

Fire Life Safety: See Appendix F.

- Fire sprinkler system
- Fire alarm and detectable warning systems
- Water supply (available water pressure)

Related Safety: See respective appendices.

- Asbestos/hazmat removal

**POLICIES AND PROVISIONS FOR DESIGN AND APPROVAL OF
MECHANICAL/PLUMBING SYSTEMS AND EQUIPMENT FOR THE
REHABILITATION OF EXISTING NON-CONFORMING BUILDINGS FOR
USE AS PUBLIC SCHOOLS**

APPENDIX J

J.1 - General

For rehabilitation of any existing building or portion of a building for use as a public school, regardless of whether the rehabilitation constitutes a change in occupancy/use, new or existing mechanical/plumbing systems and equipment shall comply with the requirements of Title 24, C.C.R., currently effective edition. These policies and provisions are applicable to existing non-conforming buildings currently being used or having previously been used for educational purposes. The systems, equipment and components should be evaluated for their configuration, condition and capacity to service the rehabilitated space.

The existing mechanical systems and equipment shall include, but not be limited to: air-handling units, fan coil units, furnaces, steam and hot water boilers, refrigeration systems, exhaust fans, evaporative coolers, water heaters, and associated equipment. The existing plumbing systems shall include, but not be limited to, the water, sewer, fuel, and fire sprinkler systems. Evaluation of inaccessible systems may necessitate removal of existing finishes or framing materials for observation.

Definition:

Rehabilitated space is defined as the area of the building that is undergoing a change in use to a public school building. Where only a portion of a building is undergoing change to a public school building, the rehabilitated space:

- Shall be separated vertically from the adjacent non-school portion by code-compliant rated wall assemblies, including area/occupancy separation walls, and by seismic separation joints where required by structural regulations.
- Shall be separated horizontally from the adjacent non-school floors, immediately above or below, by code-compliant rated floor assemblies; and, the entire building shall be equipped with an approved automatic fire sprinkler system while the portion of the building occupied by the school, shall be equipped with an approved automatic fire alarm and detection system.
- Shall include any area(s) required for egress/exiting from the public school that is located outside the public school area.

J.2 - Mechanical/Plumbing Policies for Rehabilitation of Existing Systems and Equipment

1. All newly constructed mechanical/plumbing elements, components and systems in the rehabilitated space shall comply with Title 24, C.C.R., currently effective edition, including anchorage/bracing for structural forces and displacements.
2. Existing mechanical/plumbing systems and components of the rehabilitated space intended for continued use shall be evaluated for compliance with Title 24, C.C.R., currently effective edition. All existing mechanical/plumbing systems and components not in compliance with the code shall be retrofitted to comply with Title 24, C.C.R., with the following exceptions:
 - a. Continued use of existing mechanical equipment that meets all current code requirements other than energy provisions, will be acceptable provided equipment meets minimum efficiency standards per 1995 Title 24, C.C.R.; or,
 - b. If the existing building, systems and equipment, including all modifications for rehabilitation meet current energy performance standards per Title 24, C.C.R., no individual equipment upgrades will be required provided that the individual equipment meets all current code requirements other than energy provisions.

3. For rehabilitated buildings served by a remote central plant not located on the school site, and in which the central plant is not owned by the school district, the central plant may be considered as a utility and the existing elements, components and systems at the plant will not require retrofit to compliance with current Title 24 requirements, provided the existing elements, systems and components have sufficient capacity to serve the school use. All newly constructed or retrofitted mechanical/plumbing elements, components and systems required to support the school facility at the central plant shall comply with Title 24, C.C.R., currently effective edition.
4. New or existing HVAC/plumbing systems and equipment sharing service to both the school and non-school facilities within the building shall comply or be retrofitted to comply with Title 24, C.C.R., currently effective edition, in accordance with Items 1 and 2 above. Components of systems crossing building separation joints shall be capable of accommodating the combined displacements of the respective portions during a seismic event.
5. The presence of toxic or hazardous materials/substances in existing systems, equipment or components (asbestos, lead, etc.) shall be disclosed/identified and remediated in accordance with the currently effective federal, state, and local regulatory requirements.

J.3 - Evaluation of Existing Mechanical and Plumbing Systems and Equipment for Continued Use

The policies above provide the basis for evaluation of the existing mechanical/plumbing systems, equipment and devices being considered for continued use in a building undergoing rehabilitation. Considerations include condition assessment, determination of the capacity/performance of the existing systems and equipment, and determination of the proposed demands for comparison with the capacities.

J.3.1 - Condition Assessment of Mechanical/Plumbing Systems and Equipment for Continued Use:

The existing mechanical systems and equipment for continued use shall include, but not be limited to: air-handling units, ducting, fan coil units, furnaces, steam and hot water boilers, refrigeration systems, exhaust fans, evaporative coolers, water heaters, and associated equipment. The existing plumbing systems shall include, but not be limited to, the water, sewer, fuel, and fire sprinkler systems. Evaluation of inaccessible systems may necessitate removal of existing finishes or framing materials for observation.

1. The existing mechanical/plumbing systems and equipment shall be evaluated for compliance with Title 24, C.C.R., and any deficiencies related to the following considerations shall be identified:
 - a. Physical Configuration and Condition:
 - i. The physical system and equipment shall be evaluated for any deficiencies or missing components that may need to be retrofitted or added to comply with current model code.
 - ii. Existing equipment and devices shall be listed, labeled or certified by a Nationally Recognized Testing Laboratory (NRTL). Equipment not so identified may require replacement, unless it can be tested in place by a NRTL.
 - iii. Adequate clearance around existing equipment for serviceability; may require relocation.
 - iv. Existing ducts shall be evaluated and tested for leakage.
 - b. Age and Serviceability: The age of the equipment may determine whether it is serviceable and still supported by the original manufacturer. Original equipment may be obsolete and replacement parts may be unavailable. Equipment that is unserviceable, or unable to be retrofitted to meet current code, shall be replaced.
 - c. Operating Condition:
 - i. Equipment shall be maintained in conformance with the applicable code provisions at the time of construction. Any missing parts shall be identified and replaced.
 - ii. Equipment and its enclosure should have no damage or open holes exposing live parts. Any damage, including water damage and rust, shall be identified and replaced.

J.3.2. - Determine Capacity/Performance of Existing Mechanical/Plumbing Systems and Equipment for Continued Use

Existing mechanical/plumbing systems and equipment that have been deemed appropriate for continued use in accordance with Section J.3.1., must be evaluated for their capacity/performance to service the proposed school use and for compliance with Title 24, C.C.R. Compliance shall be substantiated by calculation and data collection, including tests of the systems and equipment, in accordance with Appendix H. Considerations shall include, but not be limited to, the following:

MECHANICAL SYSTEM CONSIDERATIONS:

Hazardous and Combustible Materials:

1. Plenum return combustibles: Systems and equipment must be suitable for plenum construction, such as plenum-rated cabling.
2. Opening protection: Protection at penetrations of all rated wall, floor, roof and ceiling assemblies shall be provided; such as fire/smoke dampers in duct penetrations of rated walls.
3. Asbestos/hazmat removal: Existing equipment, duct lining and materials concealing mechanical components may contain toxic or hazardous substances which will require removal prior to retrofitting work, per currently effective regulatory requirements, including but not limited to, asbestos duct insulation, removal of lead based paints or asbestos based wall and framing materials.
4. Mold elimination: Existing equipment, condensate drain pans and finish/framing materials around the equipment may be subject to mold growth requiring remediation in accordance with state and local regulatory requirements. The building air-handler shall have a sloped drain pan to prevent water accumulation.

Water Heating Systems, Combustion, Cooling Refrigeration and Heat Rejection Equipment:

5. New Occupancy/Use System: Evaluation of the existing building systems and equipment should be based on the minimum cooling/heating demands and required energy efficiencies for the proposed new occupancy/use requirements in accordance with the Policy Statements above.
6. Chillers and boilers in same room: Per current Title 24, C.C.R., boilers require a separate one-hour rated room from chillers.

Space Conditioning and Climate Control:

7. Pre-Test and Balance of HVAC System (including outside air quantities): A pre-test and balance of the system, conducted by a Test and Balance Agency, **shall be required** to determine if the existing HVAC system has adequate capacity to provide required ventilation air, system pressurization (CFM), and conditioned air. The pre-test and balance of the system shall identify deficiencies in the system, retrofitting requirements for existing equipment, and/or whether rebalancing will satisfy system requirements for the proposed use.
8. Outside air: The existing air handling system shall be evaluated for outside air quantities suitable for the new occupancy use based on the minimum rate of outside air per occupant as listed in the current Title 24, C.C.R.
9. Indoor air quality: The building shall be evaluated for potential indoor air quality hazards, which include, but are not limited to:
 - Current and proposed minimum ventilation rates per Title 24, C.C.R. requirements. Ventilation is required for all areas housing equipment which produce hazardous fumes, such as copy machines, break rooms, janitor closets, etc.
 - Filtered air supply and contaminant control – All air supply to building shall be filtered for control of contaminants, and shall be evaluated for filter efficiency, location and gages.
 - Building's outdoor air intakes shall be located away from plumbing vents, building exhaust, traffic areas where fumes from vehicles can be pulled into the building.

10. High-rise building stairwell requirements: Stairwell pressurization and smoke removal in high-rise buildings shall comply with the requirements of Title 24, C.C.R., currently effective edition. High rise exit stairwells shall be pressurized by supplying outdoor air directly into stairwell to prohibit smoke leakage into the stairwell during a fire.
11. Atrium requirements: Pressurization and ventilation systems are required to prevent the collection of smoke and to exhaust smoke in case of fire.

Energy Efficiency:

12. Minimum SEER (COP) for HVAC equipment: Equipment and systems, in relatively new and good condition, shall be evaluated and upgraded as necessary to meet the Title 24 requirements in accordance with Policy Statements 2, 2a and 2b above.
13. Opinion of efficiency for whole building by qualified energy auditor: Evaluation of the building as a whole may determine compliance with Title 24 requirements in accordance with Policy Statements 2, 2a and 2b above.

PLUMBING SYSTEM CONSIDERATIONS:

The general requirements above should provide the basis for evaluation of the existing plumbing systems, equipment and components of the building and site identified, but not limited to, below:

Water and Sewer Systems:

1. Water supply: The water supply to the site and/or facility shall be evaluated for capacity to service the school building.
2. Pipe materials: Pipe materials for continued use in water distribution shall be evaluated for compliance with Sections 604 and 811, California Plumbing Code (C.P.C.), currently effective edition, and the usage capacity of the new school. ABS and PVC piping shall be acceptable as follows:
 - a. For sanitary drainage systems (e.g. toilet and lavatory drainage), the use of ABS or PVC (Schedule 40 DWV) is limited to relocatable school buildings.
 - b. For storm drainage systems (e.g. roof drainage), the use of ABS or PVC (Schedule 40 DWV) is allowed without exception.
 - c. For vent systems (venting of sanitary drainage systems) the use of ABS or PVC (Schedule 40 DWV) is allowed without exception.
 - d. Section 811.2.1, C.P.C., allows the use of ABS or PVC for acid waste drainage systems in school laboratories (i.e., science/photography lab).
3. Plumbing fixtures: Where existing plumbing fixtures are being considered for continued use of the rehabilitated space, additional fixtures, replacement or fixtures retrofitted for accessibility requirements shall be determined and included in the demand for water supply and sewer capacity.
4. Sewer capacity: The sewer system servicing the site and/or facility shall be evaluated for capacity to service the school building.
5. Roof drainage: Roof drainage will be required to comply with current model code requirements.

Fuel Systems:

6. Fuel supply: The fuel supply to the site and/or facility shall be evaluated for capacity to service the school building(s). Anchorage will be required per structural requirements.
7. Gas piping: Gas piping shall be evaluated for capacity to meet the maximum demand without undue loss of pressure between the point of supply (meter) and the appliance. Anchorage will be required per structural requirements.
8. Earthquake Actuated Shut-off Valve: Gas piping system shall be evaluated to determine if an automatic shut-off valve is present within the existing fuel gas piping system. The DSA/SS requires this valve for school building construction in the event of a seismic disturbance and, given a change in use/occupancy, this valve may not be part of the existing fuel gas piping system.

Hazardous Materials:

9. Asbestos/lead hazmat removal: Existing equipment, plumbing and piping and materials concealing plumbing components may contain toxic or hazardous substances which will require removal prior to retrofitting work per Department of Toxic Substances Control (California Environmental Protection Agency) and Department of Health Services (DHS) regulations, including but not limited to, lead pipe, lead solder, asbestos insulated pipes, removal of lead based paints or asbestos based materials to gain access to systems.
10. Drinking water: All drinking water samples should be analyzed in accordance with DHS requirements by a DHS-certified laboratory. In 1986, lead solder was banned from use in drinking water plumbing systems. Therefore, buildings constructed prior to 1986, and those plumbed with copper pipe, must receive the water sampling. All tap samples for lead must be collected in accordance with DHS requirements and should be first draw samples (i.e., the first water to flow out of the tap). Piping shall be replaced if the water lead content level is unacceptable as defined by DHS.

Fire Sprinkler Systems:

10. The existing building shall be evaluated for fire sprinkler system equipment; refer to Appendix F. Existing fire sprinkler systems, equipment and devices that are non-compliant will require retrofit or replacement to comply with Title 24, C.C.R. requirements.

J.3.3. - Determine Projected Load/Demand to Establish Adequacy of Existing Systems, Equipment and Devices for Continued Use:

The projected loads of the mechanical/plumbing system and equipment for the new school use, including adjustments for any new HVAC demands on the system, shall be determined and compared with the capacity of the existing systems and equipment Section J.3.2 above. If the existing mechanical/plumbing systems or equipment will not support the proposed use, then either new equipment or retrofit/replacement of the existing equipment will be required.

POLICIES AND PROVISIONS FOR DESIGN AND APPROVAL OF ELECTRICAL SYSTEMS AND EQUIPMENT FOR THE REHABILITATION OF EXISTING NON-CONFORMING BUILDINGS FOR USE AS PUBLIC SCHOOLS

APPENDIX K

K.1 - General.

For rehabilitation of any existing building or portion of a building for use as a public school, regardless of whether the rehabilitation constitutes a change in occupancy/use, new or existing electrical systems and equipment shall comply with the requirements of Title 24, C.C.R., currently effective edition. These policies and provisions are applicable to existing, non-conforming buildings currently or previously in use for educational purposes. The systems, equipment and components should be evaluated for their configuration, condition and capacity to service the rehabilitated space. Evaluation of inaccessible systems may necessitate removal of existing finishes or framing materials for observation.

Definition:

Rehabilitated space is defined as the area of the building that is undergoing a change in use to a public school building. Where only a portion of a building is undergoing such change, the rehabilitated space:

- Shall be separated vertically from the adjacent non-school portion by code-compliant rated wall assemblies, including area/occupancy separation walls, and by seismic separation joints where required by structural regulations.
- Shall be separated horizontally from the adjacent non-school floors, immediately above or below, by code-compliant rated floor assemblies; the entire building shall be equipped with an approved automatic fire sprinkler system while the portion of the building occupied by the school shall be equipped with an approved automatic fire alarm and detection system.
- Shall include any area(s) required for egress/exiting from the public school that is located outside the public school area.

K.2 - Policies for Rehabilitation of Electrical Systems, Equipment and Devices

1. All newly constructed electrical systems and equipment in the rehabilitated space shall comply with Title 24, C.C.R., currently effective edition. Electrical equipment and components shall be anchored/braced per structural requirements of Title 24.
2. Existing electrical systems and equipment within the rehabilitated space intended for continued use shall be evaluated for the proposed capacity requirements and for compliance with Title 24, C.C.R., currently effective edition. Existing systems and equipment may be deemed to comply with Title 24 requirements when supported by appropriate testing. All existing electrical systems and equipment not meeting the proposed capacity/performance requirements or not in compliance with the currently effective code shall be retrofitted to comply with Title 24, C.C.R.
3. For a rehabilitated school building served by a remote electrical facility not located within the rehabilitated building, any new or existing electrical systems and equipment servicing the facility shall comply with the provisions of Items 1 and 2 above.
4. For buildings in which only a portion of the building is being rehabilitated into a public school, any new or existing electrical systems and equipment located in the same building sharing service to both the school and non-school facilities shall comply with the provisions of Items 1 and 2 above. Components of systems crossing building separation joints shall be capable of accommodating displacements between the building portions that may occur during a seismic event.
5. The presence of toxic or hazardous materials/substances in existing electrical systems and equipment (asbestos, PCB, etc.) shall be identified/disclosed and remediated in accordance with currently effective federal, state and local regulatory requirements.

6. Electrical equipment and devices for new or continued use in the rehabilitated space shall be listed, labeled or certified for its use by a Nationally Recognized Testing Laboratory (NRTL) as recognized by the U.S. Department of Labor, Occupational Safety and Health Administration.

K.3 - Evaluation of Existing Electrical Systems and Equipment for Continued Use

The policies above provide the basis for evaluation of the existing electrical systems, equipment and devices of the building and site intended for continued use. Considerations include condition assessment, determination of the capacity of the existing systems and equipment, and determination of the proposed demands for comparison with the capacities.

K.3.1. - Condition Assessment of Existing Electrical Systems/Equipment and Fire Alarm Systems Proposed for Continued Use:

The existing electrical systems and equipment shall include, but not be limited to: switchboards/switchgear, panelboards, motor control centers, transformers, feeders, and associated equipment. The existing fire alarm systems shall include the fire alarm system and devices, the fire alarm panel and notification devices. Evaluation of inaccessible systems may necessitate removal of existing finishes or framing materials for observation.

1. The existing electrical systems/equipment and fire alarm/detectable warning systems shall be evaluated for compliance with Title 24, C.C.R.; deficiencies related to the following considerations shall be identified:
 - a. Physical Configuration and Condition:
 - i. The physical system/equipment/wiring shall be evaluated for any deficiencies or missing components that may need to be retrofitted or added to comply with current model code. Evaluation should include safety provisions, including but not limited to; electrical grounding systems, panel enclosures, feeder protection devices.
 - ii. Existing equipment and devices shall be listed, labeled or certified by a Nationally Recognized Testing Laboratory (NRTL). Equipment not so identified may require replacement unless it can be tested in place by a NRTL.
 - iii. The physical space and configuration of the existing equipment shall be identified to determine if space exists to add any devices necessary for the new school use. (Example: Space in distribution panels for additional breakers.)
 - iv. Archaic systems, equipment or components shall be identified for replacement, including, but not limited to:
 - a) Fused distribution panels,
 - b) Deteriorating wiring.
 - v. Adequate clearance from existing equipment for serviceability; may require relocation.
 - b. Age and Serviceability: The age of the equipment/devices may determine whether the equipment/devices are serviceable and still supported by the original manufacturer. Original equipment may be obsolete and replacement parts may be unavailable. Equipment that is unserviceable or unable to be retrofitted to meet current code shall be replaced.
 - c. Operating Condition:
 - i. Equipment and wiring shall be maintained in conformance with the applicable code provisions at the time of construction. Any missing or defective parts shall be identified and replaced.
 - ii. Equipment and its enclosure shall have no damage or open holes exposing live parts. Any damage, including water damage and rust, shall be identified and replaced.

K.3.2. - Determine Capacity of Existing Electrical Systems and Equipment for Continued Use:

2. Existing electrical systems and equipment that have been determined appropriate for continued use in accordance with Section K.3.1 must be evaluated for the capacity to service the proposed school use. Existing systems and equipment may be deemed to comply with Title 24 requirements when qualified/quantified by the following tests and/or calculations:
 - a. Utility: Ability of the existing service utility to provide adequate power for the new usage. If inadequate, the district may be required to replace transformers as directed by the service utility.
 - b. Panels: Load calculations or load testing may determine whether the existing electrical "panel" equipment will support the proposed new school use.

"Panel", as used herein, is defined as any panelboard, switchboard, motor control center, distribution panelboard, etc. Transfer switches and transformers are not defined as panels.

Load requirements of the existing panel system may be determined by either:

 - i. Calculation of the connected load in accordance with CEC, Article 220, or
 - ii. Continuous Ammeter Recording Load Test (7 day), which reflects the maximum loading of the equipment over a minimum 7 day period. The maximum value recorded over this period shall be multiplied by 125% to establish the maximum demand.
 - c. Breakers: Main and feeder breakers being proposed for continued use shall be tested by an approved electrical testing laboratory to verify that the breaker mechanisms function in compliance with original manufactures specifications.
 - d. Feeders: The condition of the insulation of the existing feeders must be determined. Feeders that have been in service for more then 15 years shall be tested to insure that the cable insulation is within tolerance. High Potential test on older cable must be preformed or the cables must be replaced. If aluminum cables are encountered, the terminations must be checked to insure they were made per factory specifications; re-termination may be required.
 - e. Equipment and Devices: Available Fault Current at each panel should be determined. The Interrupting Capacity (AIC) rating of existing equipment shall be checked to insure that it is adequately rated. New equipment will be rated for the available fault current.

K.3.3. - Determine Projected Load/Demand to Establish Adequacy of Existing Systems, Equipment and Devices for Continued Use:

3. The projected loads of the electrical system and equipment for the new school use, including adjustments for any new HVAC or fire alarm demands on the system, shall be determined and compared with the capacity of the existing electrical systems and equipment per Section K.3.2 above. If the existing electrical system or equipment will not support the proposed use, then either new equipment or retrofit/replacement of the existing equipment will be required.
 - a. A schematic single-line diagram shall be prepared with the major equipment labeled to identify equipment capacity and demand on the system, and shall include the following:
 - i. Voltage.
 - ii. Phase.
 - iii. Ampacity.
 - iv. Utility demand information, if available.
 - v. Breaker and fuse sizes.
 - vi. Cable size and insulation.
 - vii. Load calculated for the school use in accordance with the current CEC.
 - b. The projected loads shall be calculated for the school use in accordance with the current CEC.

K.3.4. - Fire Safety Systems:

4. The existing building shall be evaluated to determine if equipped with a complete automatic fire alarm system intended for continued use. Refer to Appendix F. Existing fire alarm systems, equipment and devices that are non-compliant may require retrofit or replacement of electrical components to comply with Title 24, C.C.R. requirements.

**REQUIREMENTS FOR THE EVALUATION AND DESIGN CRITERIA
REPORT - REHABILITATION OF HISTORIC BUILDINGS FOR PUBLIC
SCHOOL USE**

APPENDIX L

L.1 - Procedures for DSA Approval of the Evaluation and Retrofit Design

During the schematic phase of the project, the owner or design professional in responsible charge of design shall (1) perform initial data collection and assessment of the building, including site and building systems, equipment and devices proposed for continued use [see L.2 below], and (2) prepare and sign an Evaluation and Design Criteria Report defined below.

The Report shall establish the criteria for evaluation and design of the rehabilitation and the applicability of the State Historical Building Code (SHBC — described in Appendix M), when strict compliance with the regular code will adversely affect the historic fabric of the building. The Report shall be submitted to the DSA Historic School Program (HSP) Manager for review and approval prior to design development of the rehabilitation:

- The DSA shall review the Report to determine that each item in this Appendix is satisfactorily addressed.
- If one or more items are not satisfactorily addressed or the DSA does not concur with any of the proposals, the Report shall be returned to the design professional for correction.
- Upon concurrence that the proposals satisfactorily address all items in the Report, the DSA shall approve, sign and return a copy of the signed Report to the owner.

Approval to use the SHBC and the corresponding California Historical Building Code (CHBC) in the rehabilitation of an existing historic non-conforming building to a public school is a five-step process defined in Appendix M. The process includes:

1. Notification to the DSA of a historical project proposing to use the SHBC;
2. Preparation and submittal of a preliminary Historic Structures Report (HSR) to the DSA for approval presenting justification to use the SHBC (see L.3);
3. A pre-consultation meeting with the DSA prior to development of the Report;
4. Preparation and submittal of the Report to the DSA (see L.4); and
5. DSA approval of the Report.

If changes to the approved criteria are determined to be necessary during design development and completion of construction documents, the project design professional shall submit an amendment to the Report to the DSA for approval.

Upon completion of the design, the plans and specifications shall be submitted to the DSA for approval per the provisions of Part 1, Title 24.

Words underlined in this document are defined in Chapter 2, 2001, CHBC.

L.2 - Initial data collection and assessment

Initial data collection and assessment of historical features, shall be performed in accordance with Section 1650A, Division VI-R, Title 24, C.C.R. and Appendix H, and shall include:

1. Site visit(s) to the building.
2. Data collection of the existing site and building's structural, mechanical, plumbing, and electrical systems; water supply; equipment and devices; accessibility; and methods of egress in accordance with Appendices C through K and M.
3. Review of original plans, specifications and associated construction documents. Where original building and site plans and specifications are not available, "as-built" plans shall be prepared that accurately depict the existing site and building(s) per Item 2 above.

L.3 - Preliminary Historic Structures Report (HSR)

The second step of the historic building rehabilitation process to use the CHBC will be submittal of a preliminary HSR that must be reviewed, and the proposals accepted, by the DSA before submitting the project Report. A final HSR will be required within the Report. The preliminary HSR will focus on identifying and determining the character defining features which will be affected by the rehabilitation and which will require use of alternative design or construction methods from that required for non-historic structures.

The preliminary HSR will provide the following:

1. Copy of the approved nomination or documentation of the listing.
2. Concise history of the property including date of construction, dates of identifiable alterations, other significant dates such as change of use or end of occupancy.
3. Identification of areas of work required for rehabilitation of the building or structure.
4. Identification of character defining features affected by rehabilitation where use of the CHBC is proposed.

L.4 - Evaluation and Design Criteria Report

The fourth step of the historic building rehabilitation process requires the preparation and submittal of a project Evaluation and Design Criteria Report for review and approval by the DSA. The Report shall include a Final Historic Structures Report (HSR) and a Project Design and Code Analysis.

Final HSR:

The final HSR in the Report will:

1. Document only the historic fabric requiring SHBC application per design and code analysis below.
2. Provide a significance ranking of the affected fabric (described below) to be used by the HSP Manager to assess the individual fabric elements for applicability of CHBC provisions.

The rating system shall use the following rankings: 1 through 5, where 1 is non-historic fabric and 5 is the most significant historic fabric. While the scope of the HSR is limited to documenting the areas of work, the ranking system should be in relationship to the entire building. Example: The areas of work where application of the CHBC is required may be in the lobby and entrance areas of a building where the significance of the historic fabric is at its highest in relationship to the entire building. The HSR shall further define the ranking system specifically for the subject project.

Example: (5) The highest rank, unique or singular element of character defining features of the building, such as an ornamental entranceway or mural; (4) character defining features that occur in relatively few locations, such as similar decorative entrances in several locations; (3) common character defining feature, such as baseboards, architraves and fenestration; (2) historic fabric, common throughout the building, such as lath and plaster or common flooring element; (1) non-historic fabric.

3. Include the following:
 - a. Copy of the approved nomination or documentation of the listing.
 - b. Concise history of the property including the date of construction, dates of identifiable alterations, other significant dates such as change of use or end of occupancy.
 - c. Identification of areas of work required for rehabilitation of the building or structure.
 - d. General photographs showing the entire building and the important character defining features.
 - e. Photographs describing the character defining features necessitating application of the CHBC.

Project Design and Code Analysis:

To invoke the CHBC provisions of Chapters 8-1, 8-3 thru 8-6, 8-9 and 8-10, the designer must perform preliminary design and code analyses based on the provisions of regular code. Where a character-defining feature is affected by application of the regular code, alternate design using the CHBC may be proposed in the final Report (as defined in this Appendix).

Justification of the proposals shall be included in the Report, and shall:

1. Note the issue or problem and related code section;
2. Indicate alternate designs considered to determine if an alternative can alleviate the conflict with regular code;
3. Document where using the regular code affects character defining features, and explain how alternate methods achieve code compliance using the CHBC.

For structural rehabilitation, compliance with Chapter 8-7, CHBC, Alternate Structural Regulations, shall require compliance with Division VI-R, Title 24, in accordance with Section 4-307, Part 1, Title 24, C.C.R.

On a complex project, a "matrix" of the regular code issues and alternatives may help the designers and the DSA better understand the use of the CHBC. A table may be created with columns for the issues that are in conflict with the regular code and another column with proposed alternatives using the CHBC. Similar items may be "grouped" for simplicity (such as similar elements in multiple similar locations and circumstances). The DSA may require specific information on the design alternatives and the designer should be prepared to provide it. An example of a matrix is available from the DSA Historic School Program Manager.

Submit with the Evaluation and Design Criteria Report:

Approved or "as-built" building plans, specifications and associated construction documents accurately depicting existing construction and historical features of the building.

POLICIES AND PROVISIONS FOR THE REHABILITATION OF HISTORIC BUILDINGS FOR PUBLIC SCHOOL USE

APPENDIX M

Words underlined in this document are defined in Chapter 2, 2001 CHBC.

M.1 - Background

For rehabilitation of existing buildings to public schools, owners of qualified historical buildings may request use of currently effective regulations in the State Historical Building Code (SHBC), and the implementing regulations of the California Historical Building Code (CHBC), when strict compliance with the regular code adversely affects the historic fabric of the building.

Why use the CHBC? Buildings and structures identified to contribute to the culture, community or heritage of a locality — and qualified as historical — are recognized by the state as being eligible for special consideration to retain those attributes that are historic during rehabilitation or subsequent change of use. The DSA recognizes that strict use of the regular code may create difficulties where rehabilitation attempts to retain the historic characteristics of a building or structure. The CHBC provides alternatives that 1) allow most of the historic characteristics to be retained while 2) achieving the performance objectives of the regular code.

The CHBC also provides provisions to address specific preservation issues not under DSA authority including *The Secretary of the Interior's Standards*, CEQA, and local design and preservation ordinances.

M.2 - Definitions and Terminology

Terminology of historic preservation and school construction utilizes many of the same words, but with different meanings. For preservation terms, refer to Chapter 2 of the 2001 California Historical Building Code .

State Historic Building Code. The sections of the Health and Safety Code creating the SHBC program.

California Historical Building Code. The regulation created for application to qualified historical buildings and properties under the SHBC.

Regular Code. The adopted regulations governing design and construction or alteration of non-historical buildings, structures and properties within the jurisdiction of the enforcing agency. For school buildings, the adopted regulations are Title 24, C.C.R., currently effective regulations enforced by DSA.

M.3 - Determine if Your Building or Structure is a Qualified Historical Building or Structure

There are a number of ways under the SHBC to qualify a building as historic. At its simplest:

1. Designation must follow the basic rules of the California Register of Historical Resources, and
2. Buildings shall have been identified to contribute to the culture, community or heritage of a locality.
3. Buildings and structures may be of significance to the local area.
4. A school district board may designate structures under their jurisdiction as historic.

M.4 - DSA Acceptance of the State Historical Building Code (SHBC) for Rehabilitation of an Existing Historical Building to a Public School

To substantiate that the SHBC and the implementing regulations of the CHBC are applicable for use on a public school rehabilitation project, a five-step process shall be followed:

1. First, the school district or design team shall contact the DSA Regional Manager (who will then contact the Historic School Program Manager) at the earliest opportunity during the building/property selection process. The purpose is to notify the DSA of the historic project, discuss requirements for a preliminary Historic Structures Report (HSR), and to schedule a pre-Report consultation.
2. Second, the design team shall prepare and submit a preliminary HSR, as described in Appendix L, to the DSA for review and discussion by the Historic School Program Manager before the pre-Report consultation meeting.
3. Third, the DSA will conduct a pre-consultation meeting to discuss the proposals in the preliminary HSR and the requirements for the project Evaluation and Design Criteria Report.
4. Fourth, the design team shall prepare and submit the project Evaluation and Design Criteria Report as described in Appendix L.
5. Fifth, the DSA shall review and approve the Report prior to design development of the project.

M.5 – Alternative Accessibility Provisions of Historical Buildings and Properties

The California Building Code (CBC) requires non-conforming buildings converted to school use to fully comply with the current building regulations for new construction. However, the SHBC contained in C.C.R., Title 24, Part 8 (also reprinted in CBC, Chapter 34, Division II) requires state agencies to apply the SHBC to qualified historical buildings and properties in order to preserve the historical significance or character-defining features of the building or property.

Unless strict compliance with the regular code will threaten or destroy the historical significance or character-defining features of the building or property, adopted building regulations governing the construction of new (non-historical) buildings for accessibility for persons with disabilities (regular code) must be applied to existing, non-conforming, qualified historical buildings or properties converted to school use. If the historical significance or character-defining features are found to be threatened, alternative provisions for access may be applied pursuant to the SHBC — provided that, in addition to other conditions, sufficient justification is submitted to the DSA to substantiate any claims that may be made regarding the use of such alternatives. Such claims, along with supporting justification and the proposed alternative provisions, shall be submitted as a component of the HSR (outlined in Appendix L).

The application of any alternative standards for qualified historical buildings providing accessibility to persons with disabilities shall be done on a case-by-case, item-by-item basis, and shall not be applied to an entire building or structure without individual consideration of each item. This same case-by-case, item-by-item analysis shall apply to a designated historic site, beyond the immediate structure, if these elements are considered as an integral part of, and significant to the historic structure or district.

M.6 – Alternate Structural Regulations of Historical Buildings

For structural rehabilitation of a qualifying historic building, compliance with Chapter 8-7, Alternate Structural Regulations, and Chapter 8-8, Archaic Materials and Methods of Construction, of the CHBC shall require compliance with Division VI-R, Title 24, in accordance with Section 4-307, Part 1, Title 24, C.C.R.

M.7 - Alternate Mechanical, Plumbing and Electrical Regulations of Historical Buildings

Continued use of the existing mechanical, plumbing and electrical building systems and equipment of a qualifying historic building may utilize the provisions of Chapter 8-9, Mechanical Plumbing Electrical Requirements, CHBC, and shall meet the provisions of Appendices G and K.

M.8 – Alternate Fire Protection Requirements

Alternate fire protection systems in a qualifying historic building may utilize the provisions of Chapter 8-4, Fire Protection, CHBC, and shall meet the provisions of Appendices E and F.



PRE-APPLICATION FOR APPROVAL OF EVALUATION & DESIGN CRITERIA REPORT FOR REHABILITATION OF EXISTING NON-CONFORMING BUILDING FOR USE AS PUBLIC SCHOOL
Please print or type all information

Project Name: _____

Project Address: _____

City: _____ County: _____ State: ____ Zip Code: _____

Scope of Rehabilitation [description of building(s)], # of stories, etc.): _____

1. Approximate Total Floor Area (Sq. Ft.): _____ 2. Design Snow Load: _____

Name of Applicant: _____

(Acting For The Owner In The Legal Capacity of Agent Making Application For Approval Of Evaluation And Design Criteria Report) (Please Print)

Applicant's Mailing Address: _____

City: _____ County: _____ State: ____ Zip Code: _____

Applicant's E-mail Address: _____

(Required)

Applicant's Signature: _____ Date: _____

School District or Owner: _____

School District's Or Owner's Agent's Name: _____

Mailing Address: _____

City: _____ County: _____ State: ____ Zip Code: _____

() ()

Phone # Fax # School District or Owner's Agent's Email Address (Required)

For DSA Use Only

FEE RETAINER	RETAINER DEPOSIT	DSA FILE NO.	DSA PRE-APP. NO.	DATE ASSIGNED
2000				



Design and Evaluation Report Has Been Prepared By:

Architect or Structural Engineer in General Responsible Charge _____ ()
Reg. No. Phone #

Firm Name: _____

Mailing Address: _____

City: _____ County: _____ State: ___ Zip Code: _____

E-mail Address of Architect/Structural Engineer in General Responsible Charge: _____
(Required)

If preparation of portions of the design and evaluation report was delegated, show name of the architect or registered engineer, firm name, and address.

Architect: _____ Reg. No.: _____ Phone #: () _____

Firm Name: _____

Mailing Address: _____

City: _____ County: _____ State: ___ Zip Code: _____

Structural Engineer: _____ Reg. No.: _____ Phone #: () _____

Firm Name: _____

Mailing Address: _____

City: _____ County: _____ State: ___ Zip Code: _____

Mechanical Engineer: _____ Reg. No.: _____ Phone #: () _____

Firm Name: _____

Mailing Address: _____

City: _____ County: _____ State: ___ Zip Code: _____

Electrical Engineer: _____ Reg. No.: _____ Phone #: () _____

Firm Name: _____

Mailing Address: _____

City: _____ County: _____ State: ___ Zip Code: _____

Owner's Peer Reviewer: _____ Reg. No.: _____ Phone #: () _____

Mailing Address: _____

City: _____ County: _____ State: ___ Zip Code: _____

DSA San Francisco Bay Area Region
1515 Clay Street, Suite 1201
Oakland, CA 94612

DSA Sacramento Region
1102 Q Street, Suite 5200
Sacramento, CA 95814

DSA Los Angeles Basin Region
311 S. Spring Street #1301
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DSA San Diego Region
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