CLAREMONT CITY COUNCIL

MEETING AGENDA

"We are a vibrant, livable, and inclusive community dedicated to quality services, safety, financial strength, sustainability, preservation, and progress with equal representation for our community."

City Council Chamber
225 Second Street
Claremont, CA 91711

Tuesday
October 27, 2026
6:30 PM

COUNCILMEMBERS

JENNIFER STARK
MAYOR

JED LEANO **COREY CALAYCAY** **ED REECE** **SAL MEDINA**

City Council meetings are open to the public for in-person and remote participation in accordance with SB 707. If the City's two-way remote participation becomes disabled, the City Council shall recess for at least one hour, or until service is restored, whichever is earlier. If service is not able to be restored, the City Council may reconvene without remote participation. (City Council Resolution No. 2026-20)

To view and participate remotely in the meeting, use the following link: https://zoom.us/j/256208090. To listen via telephone dial (213)338-8477, Webinar ID: 256 208 090. The recorded meeting will be uploaded to the City website and archived.

OPTIONS FOR PUBLIC COMMENT

Public comment may be provided by one of the following methods. Each speaker will be given up to three (3) minutes to provide their comment.

IN-PERSON - When public comment is announced, please proceed to the podium one by one.

REMOTE (VIA ZOOM) - When the item you wish to speak to is announced, use the "raise hand" feature.

TELEPHONE - Contact the City Clerk's office by 3 PM the day of the meeting to provide your contact number. You will be called when the item you wish to speak to is addressed.

WRITTEN CORRESPONDENCE - Comments sent to the City Clerk's office will be distributed to the City Council and imaged into the record of the meeting. Comments submitted after publication of the agenda will be made available in the document archive system as soon as possible - www.claremontca.gov.

For assistance, comments, or more information please contact the City Clerk's Office:
email: cityclerk@claremontca.gov; phone: (909) 399-5461 or (909) 399-5463;
mail: 207 Harvard Avenue, Claremont CA, 91711.

CALL TO ORDER THE MEETING OF THE CITY COUNCIL

PLEDGE OF ALLEGIANCE

MOMENT OF SILENCE

ROLL CALL

CLOSED SESSION REPORT

CEREMONIAL MATTERS, PRESENTATIONS, AND ANNOUNCEMENTS

Announcements:

Claremont Helen Renwick Library Updates
Outside Public Agency Representative Updates

Presentation:

Historic Farm Bell Presentation by Opanyi and Kathryn Nasiali

Introductions:

Nicole Negron, Community Improvement Officer
Max Gonzalez, Information Technology Administrator

UPCOMING FEDERAL HOLIDAYS - Veterans Day, November 11

MAYOR AND COUNCIL

Council Items - None

Council Assignment Reports

City Councilmembers may serve as representatives on regional organizations. This time is allocated for reports about their activities. For information about the Council's local, intergovernmental and regional appointments please visit the City website: https://www.claremontca.gov/Government/City-Council/Council-Appointments.

CITY MANAGER REPORT

PUBLIC COMMENT

The Council has set aside this time for persons who wish to comment on items that are not listed on the agenda, but are within the jurisdiction of the City Council. Members of the public will have the opportunity to address the City Council regarding all items on the agenda at the time the Council considers those items.

General public comment will be taken for 30 minutes and will resume later in the meeting if there are speakers who did not get an opportunity to speak because of the 30-minute time limit.

The Brown Act prohibits the City Council from taking action on oral requests relating to items that are not on the agenda. The Council may engage in a brief discussion, refer the matter to staff, and/or schedule requests for consideration at a subsequent meeting.

CONSENT CALENDAR

All matters listed on the Consent Calendar are considered routine. The City Council may act on these items by one motion following public comment. Only Councilmembers may pull an item from the Consent Calendar for discussion, reading of resolutions and ordinances will be waived.

1. ADOPTION OF A RESOLUTION APPROVING THE CITY WARRANT REGISTER

   Recommendation: Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated October 22, 2026.

   Attachment(s): Resolution Approving City Warrant Register Dated October 22, 2026

2. CITY COUNCIL MINUTES OF OCTOBER 13, 2026 (REGULAR)

   Recommendation: Staff recommends the City Council approve the regular City Council meeting minutes of October 13, 2026.

   Attachment(s): Draft Regular Meeting Minutes of October 13, 2026

3. INVESTMENT REPORT - QUARTER ENDING SEPTEMBER 30, 2026

   Recommendation: Staff recommends the City Council accept and file the Investment Report for the quarter ending September 30, 2026.

   Attachment(s): Quarterly Investment Report

4. CLAREMONT CHAMBER OF COMMERCE VISITOR CENTER SERVICES ANNUAL REPORT 2025-26 (FUNDING SOURCE: GENERAL FUND)

   Recommendation: Staff recommends the City Council receive and file the Claremont Chamber of Commerce Annual Report for 2025-26.

   Attachment(s): 2025-26 Visitor Center Services Report

5. AWARD OF CONTRACT TO FUEL EQUIPMENT SERVICES, INC. FOR THE ABOVE-GROUND STORAGE TANK PAINTING PROJECT (FUNDING SOURCE: MOTOR FLEET FUND)

   Recommendation: Staff recommends the City Council authorize the City Manager to enter into a contract with Fuel Equipment Services, Inc. in the amount of $56,635 for the Above-Ground Storage Tank Painting Project.

6. AUTHORIZATION TO AMEND THE EXISTING AGREEMENT WITH MCE CORPORATION TO INCREASE COMPENSATION FOR RIGHT-OF-WAY LANDSCAPE MAINTENANCE SERVICES (FUNDING SOURCE: LANDSCAPE AND LIGHTING DISTRICT FUND)

Recommendation: Staff recommends the City Council:

A. Authorize the City Manager to execute an amendment to the existing agreement with MCE Corporation increasing compensation by $138,798, for a total not-to-exceed amount of $636,383 for right-of-way maintenance for the duration of the contract; and

B. Appropriate $138,798 from the Landscape and Lighting District Fund to fully fund the agreement.

7. AUTHORIZATION TO ENTER INTO AN AGREEMENT WITH SHI INTERNATIONAL CORP. FOR MICROSOFT OFFICE 365 LICENSING AND APPROPRIATION OF FUNDS (FUNDING SOURCE: TECHNOLOGY FUND)

Recommendation: Staff recommends the City Council:

A. Authorize the City Manager to enter into a 36-month agreement with SHI International Corp. to provide Microsoft Office 365 licensing in the amount of $265,832, plus a five percent contingency and applicable sales tax in the amount of $32,365, for a total contract amount of $298,197;

B. Appropriate $36,067 from the Technology Fund balance to fully fund the first two years of the agreement; and

C. Authorize the City Manager to execute the required documents to renew the City's enrollment with Microsoft Corporation as part of a joint Microsoft Enterprise Agreement.

8. HISTORICAL PROPERTY (MILLS ACT) AGREEMENT REQUEST #26-MA04, BETWEEN THE CITY OF CLAREMONT AND ALAN C. MILLER AND KRISTIN J. MILLER, PROPERTY OWNERS OF 1399 VIA ZURITA STREET

Recommendation: Staff recommends the City Council:

A. Authorize the City Manager to execute the Historical Property (Mills Act) Agreement between the City of Claremont and Alan C. Miller and Kristin J. Miller, property owners of 1399 Via Zurita Street; and

B. Find this item is exempt from environmental review under the California Environmental Quality Act (CEQA).

Attachment(s):

Draft Mills Act Contract

APC Resolution

Estimated Tax Savings Calculation

Adopted Procedures for Review & Approval of Historic Property Contracts

Photo Survey

Improvement Plan

Historical Documentation

9. ADOPTION OF A RESOLUTION APPROVING PARTICIPATION IN THE 2026-27 DEPARTMENT OF ALCOHOLIC BEVERAGE CONTROL - OFFICE OF TRAFFIC SAFETY GRANT PROGRAM (FUNDING SOURCE: ABC-OTS GRANT)

Recommendation: Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, APPROVING PARTICIPATION IN THE 2026-27 DEPARTMENT OF ALCOHOLIC BEVERAGE CONTROL - OFFICE OF TRAFFIC SAFETY (ABC-OTS) GRANT PROGRAM.

Attachment(s): Resolution Approving ABC-OTS Grant Participation

10. ADOPTION OF A RESOLUTION AFFIRMING THE APPOINTMENT OF AN INTERIM COMMUNITY DEVELOPMENT DIRECTOR (FUNDING SOURCE: GENERAL FUND)

Recommendation: Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA AFFIRMING THE INTERIM APPOINTMENT OF "RETIRED ANNUITANT" DAVID CRABTREE AS INTERIM COMMUNITY DEVELOPMENT DIRECTOR.

Attachment(s): Resolution Appointing an Interim Community Development Director

PUBLIC HEARING

Public Hearings will not begin before 7:00 p.m.

11. INTRODUCTION OF AN ORDINANCE AMENDING CHAPTER 16.110 (SHORT-TERM RENTALS) OF THE CLAREMONT MUNICIPAL CODE PERTAINING TO HOMESHARING ELIGIBILITY, PERMIT SCOPE, AND SHORT-TERM RENTAL FACILITATOR REPORTING (FUNDING SOURCE: GENERAL FUND)

Recommendation: Staff recommends the City Council:

A. Introduce for first reading, and that reading be by title only AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, AMENDING CHAPTER 16.110 (“SHORT-TERM RENTALS”) OF THE CLAREMONT MUNICIPAL CODE TO EXTEND HOMESHARING ELIGIBILITY TO QUALIFYING TENANTS, CLARIFY THE SCOPE OF SHORT-TERM RENTAL PERMITS, INCORPORATE SHORT-TERM RENTAL FACILITATOR REPORTING REQUIREMENTS UNDER SENATE BILL 346, AND MAKE RELATED CLARIFYING AMENDMENTS; and

B. Find this item is exempt from environmental review under the California Environmental Quality Act (CEQA).

Attachment(s): Proposed Short-Term Rental Ordinance

Planning Commission 9/15/26 Meeting Minutes

ORDINANCES - None

ADMINISTRATIVE ITEM

12. 2025-26 GENERAL FUND FINANCIAL UPDATE (UNAUDITED)

Recommendation: Staff recommends the City Council:

A. Allocate $688,415 of the 2025-26 General Fund surplus to the City's Operating and Environmental Emergency Reserve, bringing the reserve balance to $12,301,475 or thirty percent of budgeted 2026-27 General Fund operating expenditures and transfers out;

B. Allocate and appropriate $1,000,000 of the 2025-26 General Fund surplus for an additional discretionary payment to CalPERS to pay down the unfunded liability on the City's employee pension plans;

C. Allocate and appropriate $500,000 of the 2025-26 General Fund surplus for a contribution to fund the City's Section 115 Pension Trust;

D. Allocate and appropriate $450,000 of the 2025-26 General Fund surplus to fund a permit and business license software implementation project; and

E. Allocate $601,578 or any remaining 2025-26 General Fund surplus after completion of the annual audit to the City's Equipment and Facility Revolving Reserve.

CONTINUED PUBLIC COMMENT

This time is reserved for those persons who were unable to speak earlier in the agenda because of the 30-minute time restriction.

COMMISSIONS/COMMITTEES

One Police Commission Vacancy
One Public Art Committee Vacancy

ADJOURNMENT

THE NEXT REGULAR MEETING OF THE CLAREMONT CITY COUNCIL WILL BE HELD ON, NOVEMBER 10, 2026, AT 6:30 PM, IN THE CLAREMONT COUNCIL CHAMBER, 225 WEST SECOND STREET, CLAREMONT, CA 91711.

A LOOK AHEAD – Upcoming Meetings and Tentative Agenda Items

Helen Renwick Library Program and Activities Update
Outside Public Agency Representative Updates
Recognition of the Sagehen Civic Scholar Interns
Resolution Approving the City Warrant Register Dated November 12, 2026
Draft Minutes of the October 27, 2026 Regular City Council Meeting
Quarterly Financial Update
Approval of Final Parcel Map No. 83826 for Senate Bill 9 Subdivision Purposes

2025 Sustainability Annual Report
American Rescue Plan Update and Reallocation of Funds
Multi-Agency (LAFCO/Claremont/Upland) Agreement for CMC Sewer Service
Award of Contract for Claremont Blvd. Complete Streets Project (Foothill to Ninth)
Long Range Financial Plan Update
Recommendations from HR&A on Rental Assistance Funding Strategy

IN COMPLIANCE WITH THE AMERICANS WITH DISABILITIES ACT 0F 1990, THIS AGENDA WILL BE MADE AVAILABLE IN APPROPRIATE ALTERNATIVE FORMATS TO PERSONS WITH DISABILITIES. ANY PERSON WITH A DISABILITY WHO REQUIRES A MODIFICATION OR ACCOMMODATION IN ORDER TO PARTICIPATE IN A CITY MEETING SHOULD CONTACT THE CITY CLERK AT 909-399-5461 or 909-399-5463 “VOICE” OR 1-800-735-2929 “TT/TTY” AT LEAST THREE (3) WORKING DAYS PRIOR TO THE MEETING, IF POSSIBLE.

I, SHELLEY DESAUTELS, CITY CLERK OF THE CITY OF CLAREMONT, CALIFORNIA, HEREBY CERTIFY UNDER PENALTY OF PERJURY THAT THE FOREGOING AGENDA WAS POSTED AT CLAREMONT CITY HALL, 207 HARVARD AVENUE, ON OCTOBER 22, 2026, PURSUANT TO GOVERNMENT CODE SECTION 54954.2.

POST THROUGH: October 28, 2026

Claremont City Council

Agenda Report

File #: 6192 **Item No:** 1.

TO: ADAM PIRRIE, CITY MANAGER

FROM: SHELLEY DESAUTELS, CITY CLERK

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

ADOPTION OF A RESOLUTION APPROVING THE CITY WARRANT REGISTER

RECOMMENDATION

Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated October 22, 2026.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Shelley Desautels
City Clerk

Attachment:
Resolution Approving City Warrant Register Dated October 22, 2026

RESOLUTION NO. 2026-

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID

NOW THEREFORE, THE CLAREMONT CITY COUNCIL DOES HEREBY RESOLVE:

SECTION 1. That the list of claims and demands dated October 22, 2026, totaling $2,502,432.31 has been audited as required by law.

SECTION 2. That warrant numbers 5091 through 5280 and 271250 through 271403 inclusive are hereby allowed in the amounts and ordered paid out of the respective funds.

SECTION 3. That the Mayor shall sign this Resolution and the City Clerk shall attest and certify to the passage and adoption thereof.

PASSED, APPROVED, AND ADOPTED this 27th day of October, 2026.

_____
Mayor, City of Claremont

ATTEST:

_____
City Clerk, City of Claremont

Claremont City Council

Agenda Report

File #: 6193 **Item No:** 2.

TO: ADAM PIRRIE, CITY MANAGER

FROM: SHELLEY DESAUTELS, CITY CLERK

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

CITY COUNCIL MINUTES OF OCTOBER 13, 2026 (REGULAR)

RECOMMENDATION

Staff recommends the City Council approve the regular City Council meeting minutes of October 13, 2026.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Shelley Desautels
City Clerk

Prepared by:

Jamie Costanza
Deputy City Clerk

Attachment:
Draft Regular Meeting Minutes of October 13, 2026

CLAREMONT CITY COUNCIL
MEETING MINUTES

Tuesday, October 13, 2026 – 6:30 PM
Video Recording is Archived on the City Website
https://www.claremontca.gov/Government/City-Council/Watch-a-Meeting

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CALL TO ORDER

Mayor Stark called the meeting to order at 6:30 PM.

PLEDGE OF ALLEGIANCE

MOMENT OF SILENCE – In honor of Freeman Allen, Barbara Royalty, and Taylor McCay Hamlet.

ROLL CALL

PRESENT COUNCILMEMBER: CALAYCAY, LEANO, REECE, STARK

ABSENT COUNCILMEMBER: MEDINA

ALSO PRESENT Adam Pirrie, City Manager; Katie Wand, Acting Assistant City Manager; Alisha Patterson, City Attorney; Mike Ciszek, Chief of Police; Jeremy Swan, Director of Community Services; Melissa Vollaro, Director of Recreation and Human Services; Jeremy Starkey, Director of Finance; David Crabtree, Interim Director of Community Development; Shelley Desautels, City Clerk

CLOSED SESSION REPORT

There was no closed session meeting.

CEREMONIAL MATTERS, PRESENTATIONS, AND ANNOUNCEMENTS

This item starts at 10:04 in the archived video.

Katherine Loeser, Claremont Helen Renwick Library Librarian, provided an update on upcoming Library events.

David Crabtree, Interim Community Development Director; Anne Bennett, Administrative Assistant; and Louis Guevara, Maintenance Craftsworker I were introduced.

The City Council recognized the Kiwanis Club of Claremont for Its Sponsorship of the Monday Night Concert Series.

UPCOMING FEDERAL HOLIDAYS

MAYOR AND COUNCIL

Council Items – None

Council Assignment Reports

This item starts at 21:47 in the archived video.

Councilmember Calaycay reminded all to be aware of any standing water after the recent rainfall.

Councilmember Leano reported on the Tri City Mental Health Mobile Crisis Team.

Mayor Stark reported that she attended the League of California Cities Conference as well as the CJPIA Risk Management Conference.

CITY MANAGER REPORT

This item starts at 25:50 in the archived video.

City Manager Pirrie reported on the Citywide speed survey implementation project, construction taking place at the St. Ambrose affordable housing project, and invited all to attend the Committee on Human Relations workshops on October 20.

PUBLIC COMMENT

This item starts at 27:45 in the archived video.

City Clerk Desautels announced one general written public comment had been received.

Mayor Stark invited public comment.

Bob Hale, Claremont resident, expressed concern regarding the upcoming City Council election.

Sherri Shaw, Three Valleys Municipal Water Board Division 3 Candidate, shared her reasons as to why Claremont residents should vote for her.

Isaac Addai highlighted his written public comment and spoke about issues he has experienced when playing soccer in City parks.

Unidentified speaker questioned why parklets in the Village were removed and spoke in support of Anna Jacobsen, Council Candidate District 4.

Mayor Stark closed public comment.

CONSENT CALENDAR

This item starts at 47:44 in the archived video.

City Clerk Desautels announced no written public comment had been received on the Consent Calendar.

Mayor Stark invited public comment on the Consent Calendar.

Andrew Alonzo, Claremont Courier, spoke to Consent Calendar Item No. 5 and questioned the number of tasers being acquired, associated equipment, when will the tasers arrive, who will have access to the tasers, and comparison to past tasers.

Unidentified speaker spoke to Consent Calendar Item No. 5 and questioned why the tasers were being acquired.

There were no other requests to speak.

Mayor Stark closed public comment.

Councilmember Calaycay pulled Consent Calendar Item No. 5.

Councilmember Calaycay moved to approve Consent Calendar Items No. 1-4, seconded by Councilmember Reece, and carried on a roll call vote as follows:

AYES: Councilmember – Calaycay, Leano, Reece, Stark
NOES: Councilmember – None
ABSENCES: Councilmember – Medina

1. Adoption of Resolutions Approving the City Warrant Registers
   A. Adopted Resolution No. 2026-50, A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated September 24, 2026; and
   B. Adopted Resolution No. 2026-51, A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated October 8, 2026.

2. City Council Minutes of September 22, 2026 (Regular)
   Approved the regular City Council meeting minutes of September 22, 2026.

3. Authorization to Enter Into an Agreement with AKM Consulting Engineers for a Sewer Model Update (Funding Source: Sewer Fund)
   A. Authorized the City Manager to enter into an agreement with AKM Consulting Engineers for a Sewer Model Update in an amount not to exceed $372,269; and
   B. Appropriated $22,269 from the Sewer Fund to fully fund the agreement.

4. Award of Contract to Green Shield Energy for On-Call Electrical Services (Funding Sources: General Fund and Landscape and Lighting District Fund)
   Authorized the City Manager to execute a three-year contract with two optional one-year extensions with Green Shield Energy for on-call electrical services, in an amount not to exceed $50,000 annually.

5. Authorization to Enter Into a Five-Year Lease Agreement with Axon Enterprise Inc. for the Purchase of Taser 10 Less Lethal Electronic Control Devices (Funding Source: COPS/SLESF Grant)
   This item was removed from the Consent Calendar.

Item Removed from the Consent Calendar

5. Authorization to Enter Into a Five-Year Lease Agreement with Axon Enterprise Inc. for the Purchase of Taser 10 Less Lethal Electronic Control Devices (Funding Source: COPS/SLESF Grant)

   This item starts at 51:58 in the archived video.

Cory Hodge, Police Corporal, responded to questions raised during the public comment period.

Councilmember Leano moved to authorize the City Manager to enter into a five-year agreement with Axon Enterprise, Inc. in the amount of $254,134.04, and authorize a five percent contingency of $12,706.70 for any necessary change orders during the five-year term of the agreement, for a total authorized amount of $266,840.74, seconded by Councilmember Reece, and carried on a roll call vote as follows:

AYES: Councilmember – Calaycay, Leano, Reece, Stark
NOES: Councilmember – None
ABSENCES: Councilmember – Medina

PUBLIC HEARINGS – None

ORDINANCES – None

6. Update on Rental Assistance Programming (Funding Sources: Successor Housing Fund and Inclusionary Housing Fund)

This item starts at 57:51 in the archived video.

Katie Wand, Acting Assistant City Manager, gave a PowerPoint presentation, and responded to questions from the City Council related to HR&A assistance, Technical Assistance Grant, technical services provided, possible tier system, and validation of qualification.

City Clerk Desautels announced two written public comments had been received.

Mayor Stark invited public comment.

Marianne Hoken spoke in support of the rental assistance program.

Jose Ochoa, Claremont Tenants United, spoke in support of staff's recommendation and encouraged the City Council to find a permanent solution.

Unidentified speaker spoke in support of the rental assistance program and urged the City Council to enact rent caps.

Mike Boos shared his personal experiences of renting in Claremont.

Unidentified speaker, Claremont Tenants United, requested the City Council allocate unused ARPA funds to fund the rental assistance program through June 2027, reopen the existing program, and find long term support for those in a housing crisis.

Joseph Flo, Claremont resident, spoke in support of the rental assistance program and highlighted his negative experiences with housing resources.

Unidentified speaker, Claremont resident, spoke in support of tenants and asked the City Council to support them.

Elizabeth Tulac asked the City Council to look at all possibilities and think outside the box when helping tenants in Claremont.

Unidentified speaker spoke in support of the rental assistance program and expressed concerns with bureaucracy.

There were no other requests to speak.

Mayor Stark closed public comment.

Councilmember Reece reminded all that funds have restricted uses and spoke in support of staff's recommendation.

Councilmember Calaycay spoke in support of staff's recommendation as the Successor Housing Fund and Inclusionary Housing Fund can be used for this purpose.

Councilmember Leano spoke in support of the City's rental assistance program and will support staff's recommendation.

Mayor Stark spoke in support of staff's recommendation and looks forward to potentially growing the current rental assistance program.

Councilmember Reece moved to appropriate $140,000 from the Successor Housing Fund and $220,000 from the Inclusionary Housing Fund to continue the Claremont Temporary Housing Stabilization and Relocation Program through June 30, 2027, seconded by Councilmember Calaycay, and carried on a roll call vote as follows:

AYES: Councilmember – Calaycay, Leano, Reece, Stark
NOES: Councilmember – None
ABSENCES: Councilmember – Medina

ADJOURNMENT

Mayor Stark adjourned the regular meeting of the Claremont City Council at 8:38 PM. The next regular meeting of the Claremont City Council will be held on October 27, 2026.

_____
Mayor

ATTEST:

_____
Deputy City Clerk

Claremont City Council

Agenda Report

File #: 6205 **Item No:** 3.

TO: ADAM PIRRIE, CITY MANAGER

FROM: JEREMY STARKEY, FINANCE DIRECTOR

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

INVESTMENT REPORT - QUARTER ENDING SEPTEMBER 30, 2026

SUMMARY

As required by the City of Claremont Investment Policy and State law, a Quarterly Investment Report showing investment activity is to be presented to the City Council for its review and acceptance.

RECOMMENDATION

Staff recommends the City Council accept and file the Investment Report for the quarter ending September 30, 2026.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request additional information.

FINANCIAL REVIEW

The City's investment portfolio is highly liquid, with the Local Agency Investment Fund (LAIF) and the Collateralized Savings funds available with 24-hour notification. The weighted average of days to maturity of all City investments is approximately 163 days.

As of September 30, 2026, the market value of City-held investments totaled $48,325,217 of which $22,385,988 (46.33 percent) was invested in LAIF; $14,355,000 (29.70 percent) in Certificates of Deposit; $11,043,580 (22.85 percent) in United States Treasury Bills; and $540,649 (1.12 percent) in Collateralized Savings/Money Market Accounts. These investments fully comply with the City's current Investment Policy.

In addition to the above investments, the City established a Section 115 pension trust with Public Agency Retirement Services (PARS) to prefund pension costs. As of September 30, 2026, the market value of the trust totaled $6,312,983.

The cost of staff time to research this issue, prepare documentation, and complete this report is estimated to be $544. Funding is included in the operating budget of the Financial Services Department.

ANALYSIS

During the quarter ending September 30, 2026, the City maintained investments in Certificates of Deposit (CD), Collateralized Savings/Money Market Accounts, and in the Local Agency Investment Fund (LAIF), which is managed by the Treasurer's Office of the State of California. Investments in LAIF earned interest in the amount of $227,205, CD interest amounted to $122,249, United States Treasury Bills amounted to $73,846, and collateralized savings/safekeeping account interest amounted to $1,230.

There was an overall decrease of $7,398,627 in the City's treasury investment portfolio from the previous quarter as shown in the Investment Report (Attachment). The decrease in invested funds was primarily the result of the prepayment of the City's annual required contributions towards the unfunded liability of its' CalPERS pensions plans and a payment of the City's annual insurance deposits. Later in the fiscal year, revenues received that exceed the amount required to maintain City operations will be deposited into the City's investment accounts to replenish their balances.

In March 2024, surplus funds of $4,981,139 were invested in six-month United States Treasury Bills to diversify the City's treasury investment portfolio. In August 2024, an additional $4,894,520 was invested in six-month Treasuries. In September 2024, upon maturity of those Treasuries purchased in March, $5,092,152 in funds were reinvested in new six-month Treasuries. Upon maturity of these treasury investments in the first and second quarter of 2025, investments in Treasuries increased to $11,050,000 and in two-year terms at rates comparable to those currently available in certificates of deposits. These investments fully comply with the City's current Investment Policy.

In 2021, the City Council authorized the establishment of a Section 115 pension trust with PARS for future discretionary contributions and/or disbursements to the City's pension obligations, while allowing local control of funds in the Trust. The City selected a moderately conservative portfolio at the Trust's inception. The current asset allocation policy is 30 percent in stocks, 65 percent in bonds and 5 percent in cash.

In 2021-22, the City Council approved a contribution of $1 million to the Trust. In October 2022, the City Council authorized an additional contribution of $1.5 million to the Trust. An additional $1 million contribution was authorized by the City Council in October 2023 from 2022-23 surplus funds and an additional $1 million was again authorized in October 2024 from 2023-24 surplus funds. These funds were deposited and are reflected in this Investment Report. Lastly, an additional $500,000 contribution was authorized by the City Council in October 2025 from 2024-25 surplus funds, which was transferred in December.

In January 2025, the City Council authorized the administration of the Section 115 Trust to be transferred from PARS to Shuster Advisory Group, LLC. This action also transferred the Trust's assets to Charles Schwab Trust Bank and named Alta Trust Company as the trustee. The transfer of

assets was effective on April 1, 2025.

The market value of the Section 115 Trust totaled $6,312,983 as of September 30, 2026, recognizing a loss of 2.24 percent in the last quarter. To provide benchmarks for the returns in the City's Section 115 Trust, the stock indices for the S&P 500 increased by 2.25 percent and the Dow 30 decreased by 2.7 percent during the same time period.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff have evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it relates to the following City Planning Documents: Council Priorities, General Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Jeremy Starkey
Finance Director

Prepared by:

Bibi Ameer
Accounting Supervisor

Attachment:
Quarterly Investment Report

ATTACHMENT

CITY OF CLAREMONT
INVESTMENT REPORT
JULY 1, 2026 THROUGH SEPTEMBER 30, 2026

INVESTMENT DESCRIPTION	PURCHASE DATE	MATURITY DATE	BALANCES @ JUNE 30, 2026 PAR VALUE	ORIGINAL COST	MARKET VALUE*	ADDS/(SELLS)/ (MATURITIES) DURING PERIOD @ COST	BALANCES @ SEPTEMBER 30, 2026 PAR VALUE	ORIGINAL COST	MARKET VALUE*	INTEREST EARNED DURING QTR	YIELD	INTEREST RECEIVED DURING QTR
CITY HELD INVESTMENTS												
BMO COLLATERALIZED SAVINGS ACCOUNT	N/A	N/A	63,941	63,941	63,941	383,320	447,261	447,261	447,261	1,203	2.21%	1,203
MULTI BANK SECURITIES SAFEKEEPING ACCOUNT	N/A	N/A	93,388	93,388	93,388	-	93,388	93,388	93,388	27	1.00%	27
CERTIFICATES OF DEPOSIT (ISRAEL DISC BK NEW YORK CTF)	08/07/24	08/07/26	244,000	244,000	244,000	(244,000)	-	-	-	-	4.25%	5,142
CERTIFICATES OF DEPOSIT (BLUE RIDGE BK NATL ASSN MARTINSVILLE VA CTF)	08/13/24	08/13/26	244,000	244,000	244,000	(244,000)	-	-	-	-	4.45%	5,384
CERTIFICATES OF DEPOSIT (WORKERS FED CR UN LITTLEON MA SH CTF)	08/30/24	08/31/26	248,000	248,000	248,000	(248,000)	-	-	-	-	4.15%	1,748
CERTIFICATES OF DEPOSIT (AMERICAN EXPRESS NATL BK BROKERED INTL CTF)	09/11/24	09/11/26	245,000	245,000	245,000	(245,000)	-	-	-	-	3.95%	4,879
CERTIFICATES OF DEPOSIT (RIVERWOOD BK BEMIDJI MINN CTF)	09/11/24	09/11/26	249,000	249,000	249,000	(249,000)	-	-	-	-	3.90%	2,448
CERTIFICATES OF DEPOSIT (CARTER BK & TR MARTINSVILLE VA CTF)	09/13/24	09/14/26	249,000	249,000	249,000	(249,000)	-	-	-	-	3.95%	2,506
CERTIFICATES OF DEPOSIT (VANTAGE WEST CR UN TUCSON ARIZ SH CTF)	09/13/24	09/14/26	249,000	249,000	249,000	(249,000)	-	-	-	-	4.10%	2,601
CERTIFICATES OF DEPOSIT (PREFERRED BK LOS ANGELES CALIF CTF)	09/19/24	09/21/26	249,000	249,000	249,000	(249,000)	-	-	-	-	3.90%	2,501
CERTIFICATES OF DEPOSIT (ALLY BK SANDY UTAH CTF)	09/19/24	09/21/26	245,000	245,000	245,000	(245,000)	-	-	-	-	3.95%	4,932
CERTIFICATES OF DEPOSIT (MEDALLION BK SALT LAKE CITY UTAH CTF)	11/08/24	11/09/26	249,000	249,000	249,000		249,000	249,000	249,000	2,448	3.90%	2,448
CERTIFICATES OF DEPOSIT (TRANSPORATION ALLIANCE BK INC OGDEN UTAH CTF)	11/08/24	11/06/26	249,000	249,000	249,000		249,000	249,000	249,000	2,510	4.00%	2,510
CERTIFICATES OF DEPOSIT (SAN FRANCISCO FED CR UN CALIF SH CTF)	11/27/24	11/27/26	249,000	249,000	249,000		249,000	249,000	249,000	2,667	4.25%	2,667
CERTIFICATES OF DEPOSIT (HOMELAND CR UN CHILLICOTHE OHIO CTF)	11/29/24	11/30/26	249,000	249,000	249,000		249,000	249,000	249,000	2,667	4.25%	2,667
CERTIFICATES OF DEPOSIT (TOYOTA FINL SVGS BK HENDERSON NV CTF)	04/10/25	04/12/27	245,000	245,000	245,000		245,000	245,000	245,000	2,470	4.00%	-
CERTIFICATES OF DEPOSIT (MY CMNTY CR UN MIDLAND TX SH CTF)	04/16/25	04/16/27	249,000	249,000	249,000		249,000	249,000	249,000	2,416	3.85%	2,416
CERTIFICATES OF DEPOSIT (FINWISE BK MURRAY UT CTF)	05/21/25	05/21/27	249,000	249,000	249,000		249,000	249,000	249,000	2,510	4.00%	2,510
CERTIFICATES OF DEPOSIT (BNY MELLON N A INSTL CTF)	06/11/25	06/11/27	245,000	245,000	245,000		245,000	245,000	245,000	2,470	4.00%	-
CERTIFICATES OF DEPOSIT (CONNEXUS CR UN WAUSAU WIS SH CTF)	08/06/25	08/06/27	249,000	249,000	249,000		249,000	249,000	249,000	2,580	4.11%	2,573
CERTIFICATES OF DEPOSIT (POPULAR BK NEW YORK BRH INSTL CTF)	08/06/25	08/06/27	247,000	247,000	247,000		247,000	247,000	247,000	2,397	3.85%	2,397
CERTIFICATES OF DEPOSIT (FIRST BK OF THE LAKE OSAGE BEACH MO CTF)	08/13/25	08/13/27	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (TUCSON FED CR UN ARIZ SH CTF)	08/20/25	08/20/27	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (GLOBAL FED CR UN ANCHORAGE ALASKA SH CTF)	08/14/25	08/16/27	249,000	249,000	249,000		249,000	249,000	249,000	2,462	3.92%	2,448
CERTIFICATES OF DEPOSIT (MIBK MACKS CREEK MO CTF)	08/26/25	08/26/27	245,000	245,000	245,000		245,000	245,000	245,000	2,408	3.90%	4,738
CERTIFICATES OF DEPOSIT (MORGAN STANLEY BK NA SAL LAKE CITY UTAH CTF)	09/03/25	09/03/27	239,000	239,000	239,000		239,000	239,000	239,000	2,319	3.85%	4,639
CERTIFICATES OF DEPOSIT (LUANA SVGS BK IOWA CTF)	09/10/25	09/10/27	245,000	245,000	245,000		245,000	245,000	245,000	2,254	3.65%	4,508
CERTIFICATES OF DEPOSIT (MUTUAL ONE BK FRAMINGHAM MA CTF)	09/17/25	09/17/27	245,000	245,000	245,000		245,000	245,000	245,000	2,223	3.60%	4,446
CERTIFICATES OF DEPOSIT (OKLAHOMA EDUCATORS CR UN OKLA CITY SH CTF)	09/19/25	09/20/27	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291
CERTIFICATES OF DEPOSIT (CARTER FED CR UN SPRINGHILL LA SH CTF)	09/24/25	09/24/27	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291
CERTIFICATES OF DEPOSIT (CORPORATE AMER FAMILY CR UN ELGIN ILL SH CTF)	09/29/25	03/29/27	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (USF FED CR UN TAMPA FLA SH CTF)	11/28/25	11/29/27	248,000	248,000	248,000		248,000	248,000	248,000	2,313	3.70%	2,313
CERTIFICATES OF DEPOSIT (LIVE OAK BKG CO WILMINGTON N C CTF)	12/04/25	12/03/27	249,000	249,000	249,000		249,000	249,000	249,000	2,354	3.75%	2,354
CERTIFICATES OF DEPOSIT (AUSTIN TELCO FED CR UN TEX SH CTF)	01/30/26	01/31/28	249,000	249,000	249,000		249,000	249,000	249,000	2,354	3.75%	2,354
CERTIFICATES OF DEPOSIT (MERRICK BK SOUTH JORDAN UTAH CTF)	02/10/26	02/10/28	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291
CERTIFICATES OF DEPOSIT (AMERICAN COML BK & TR NATL ASSN OTTAWA ILL CTF)	02/13/26	02/14/28	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291
CERTIFICATES OF DEPOSIT (INSTITUTION FOR SVGS IN NEWBURYPORT & ITS CTF)	02/20/26	02/22/28	249,000	249,000	249,000		249,000	249,000	249,000	2,322	3.70%	2,322
CERTIFICATES OF DEPOSIT (UNITED BANKERS BK BLOOMINGTON MINN CTF)	02/20/26	02/22/28	249,000	249,000	249,000		249,000	249,000	249,000	2,259	3.60%	2,259
CERTIFICATES OF DEPOSIT (DIRECT FED CR UN NEEDHAM MASS SH CTF)	02/23/26	02/23/28	249,000	249,000	249,000		249,000	249,000	249,000	2,322	3.70%	2,322
CERTIFICATES OF DEPOSIT (MAINSTREET BK FAIRFAX VA CTF)	03/06/26	03/06/28	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291
CERTIFICATES OF DEPOSIT (CELTIC BK SALT LAKE CITY UTAH CTF)	03/10/26	03/10/28	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291
CERTIFICATES OF DEPOSIT (WELLS FARGO BK NA SIOUX FALLS SD CTF)	03/20/26	03/20/28	249,000	249,000	249,000		249,000	249,000	249,000	2,416	3.85%	2,416
CERTIFICATES OF DEPOSIT (OPTUM BK DRAPER UTAH CTF)	03/23/26	03/23/28	245,000	245,000	245,000		245,000	245,000	245,000	2,285	3.70%	4,570
CERTIFICATES OF DEPOSIT (HADDON SVGS BK HADDON HEIGHTS NJ CTF)	03/24/26	03/24/28	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,322
CERTIFICATES OF DEPOSIT (BANKFIRST NORFOLK NE CTF)	03/25/26	03/27/28	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291
CERTIFICATES OF DEPOSIT (LOCUS BK INC VA CTF)	03/25/26	03/27/28	249,000	249,000	249,000		249,000	249,000	249,000	2,291	3.65%	2,291

CITY OF CLAREMONT
INVESTMENT REPORT
JULY 1, 2026 THROUGH SEPTEMBER 30, 2026

INVESTMENT DESCRIPTION	PURCHASE DATE	MATURITY DATE	BALANCES @ JUNE 30, 2026 PAR VALUE	ORIGINAL COST	MARKET VALUE*	ADDS/(SELLS)/ (MATURITIES) DURING PERIOD @ COST	BALANCES @ SEPTEMBER 30, 2026 PAR VALUE	ORIGINAL COST	MARKET VALUE*	INTEREST EARNED DURING QTR	YIELD	INTEREST RECEIVED DURING QTR
CERTIFICATES OF DEPOSIT (GULF CAP BK HOUSTON TEX CTF)	03/26/26	03/27/28	245,000	245,000	245,000		245,000	245,000	245,000	2,254	3.65%	4,508
CERTIFICATES OF DEPOSIT (FIRST UTAH BK SALT LAKE CITY UT CTF)	03/31/26	03/31/28	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (EAGLEMARK SVGS BK CARSON CITY NEV CTF)	04/01/26	03/31/28	245,000	245,000	245,000		245,000	245,000	245,000	2,408	3.90%	-
CERTIFICATES OF DEPOSIT (BANK OF AMER NA CHARLOTTE NC CTF)	04/02/26	04/03/28	245,000	245,000	245,000		245,000	245,000	245,000	2,439	3.95%	-
CERTIFICATES OF DEPOSIT (MANUFACTURERS & TRADERS TR CO BUFFALO NY CTF)	03/31/26	03/31/28	245,000	245,000	245,000		245,000	245,000	245,000	2,408	3.90%	4,791
CERTIFICATES OF DEPOSIT (STRYV BK WICHITA KANS CTF)	04/10/26	04/10/28	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (KEMBA FINL CR UN GAHANNA OHIO SH CTF)	04/16/26	04/17/28	249,000	249,000	249,000		249,000	249,000	249,000	2,448	3.90%	2,448
CERTIFICATES OF DEPOSIT (MORGAN STANLEY PRIVATE BK NATL ASSN PUR NY CTF)	04/22/26	04/24/28	245,000	245,000	245,000		245,000	245,000	245,000	2,439	3.95%	-
CERTIFICATES OF DEPOSIT (SONATA BK BRENTWOOD TENN CTF)	04/24/26	04/24/28	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (PLANTERS BK & TR CO INDIANOLA MISS CTF)	04/30/26	05/01/28	245,000	245,000	245,000		245,000	245,000	245,000	2,378	3.85%	-
CERTIFICATES OF DEPOSIT (MI BK BLOOMFIELD TWP MICH CTF)	05/01/26	05/01/28	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (COMMUNITY BK CAMERON WIS CTF)	05/08/26	05/08/28	249,000	249,000	249,000		249,000	249,000	249,000	2,385	3.80%	2,385
CERTIFICATES OF DEPOSIT (BANK HAPOLAIM B M NEW YORK BRH CTF)	05/14/26	05/10/28	245,000	245,000	245,000		245,000	245,000	245,000	2,408	3.90%	-
CERTIFICATES OF DEPOSIT (BMW BK NORTH AMER SALT LAKE CITY UTAH CTF)	05/15/26	05/15/28	245,000	245,000	245,000		245,000	245,000	245,000	2,470	4.00%	-
CERTIFICATES OF DEPOSIT (UBS BK USA NATL ASSN SALT LAKE CITY UTAH CTF)	09/09/26	09/11/28	-	-	-	249,000	249,000	249,000	249,000	609	4.25%	-
CERTIFICATES OF DEPOSIT (VALLEY NATL BK PASSAIC NJ CTF)	09/09/26	09/11/26	-	-	-	244,000	244,000	244,000	244,000	597	4.25%	-
CERTIFICATES OF DEPOSIT (VANTAGE WEST CR UN TUCSON ARIZ SH CTF)	09/14/26	09/14/28	-	-	-	248,000	248,000	248,000	248,000	467	4.30%	-
CERTIFICATES OF DEPOSIT (MECHANICS COOP BK TAUNTON MASS CTF)	09/15/26	09/15/28	-	-	-	244,000	244,000	244,000	244,000	421	4.20%	-
CERTIFICATES OF DEPOSIT (FIRST NATL BK MCGREGOR TEX CTF)	09/21/26	09/21/28	-	-	-	249,000	249,000	249,000	249,000	261	4.25%	-
CERTIFICATES OF DEPOSIT (FISHER NATL BK ILLNOIS CTF)	09/25/26	09/25/28	-	-	-	249,000	249,000	249,000	249,000	145	4.25%	-
CERTIFICATES OF DEPOSIT (SEVEN SEVENTEEN CR UN WARREN OHIO SH CTF)	09/30/26	09/29/28	-	-	-	247,000	247,000	247,000	247,000	-	4.65%	-
CERTIFICATES OF DEPOSIT (ESL FED CR UN ROCHESTER NEW YORK SH CTF)	08/03/26	08/01/28	-	-	-	249,000	249,000	249,000	249,000	1,721	4.35%	861
CERTIFICATES OF DEPOSIT (HOPE FED CR UN JACKSON MOSS SH CTF)	08/17/26	08/17/28	-	-	-	244,000	244,000	244,000	244,000	1,250	4.25%	-
UNITED STATES TREASURY BILLS	01/17/25	01/15/27	5,250,368	5,250,368	5,250,368	(3,308)	5,247,060	5,247,060	5,247,060	43,940	4.00%	105,000
UNITED STATES TREASURY BILLS	02/20/25	02/15/27	5,803,364	5,803,364	5,803,364	(6,844)	5,796,520	5,796,520	5,796,520	29,906	4.12%	119,625
LOCAL AGENCY INVESTMENT FUND (LAIF)	N/A	N/A	30,158,783	30,158,783	30,158,783	(7,772,795)	22,385,988	22,385,988	22,385,988	227,205	3.97%	227,205
TOTAL CITY HELD INVESTMENTS			$ 55,723,844	$ 55,723,844	$ 55,723,844	$ (7,398,627)	$ 48,325,217	$ 48,325,217	$ 48,325,217	$ 424,530		$ 599,414
SHUSTER-SECTION 115 PENSION TRUST	N/A	N/A	6,458,940	6,458,940	6,458,940	(145,957)	6,312,983	6,312,983	6,312,983	55,018	-2.24%	55,018

CITY HELD INVESTMENT DATA:

DISTRIBUTION OF CITY INVESTMENTS:

Local Agency Investment Fund (LAIF)	46.33%
Brokered Certificates of Deposit	29.70%
Treasuries	22.85%
Collateralized Savings/Safekeeping Accounts	1.12%

WEIGHTED AVERAGE DAYS TO MATURITY:

BEGINNING OF QUARTER:	157 Days
END OF QUARTER:	163 Days

Claremont City Council

Agenda Report

File #: 6208 **Item No:** 4.

TO: ADAM PIRRIE, CITY MANAGER

FROM: KATIE WAND, ACTING ASSISTANT CITY MANAGER

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

CLAREMONT CHAMBER OF COMMERCE VISITOR CENTER SERVICES ANNUAL REPORT 2025-26 (FUNDING SOURCE: GENERAL FUND)

SUMMARY

The City of Claremont contracted with the Claremont Chamber of Commerce (Chamber) in 2025-26 to provide Visitor Center services on behalf of the City. As a requirement of its agreement with the City, the Chamber must prepare an annual year-end report on its Visitor Center services.

RECOMMENDATION

Staff recommends the City Council receive and file the Claremont Chamber of Commerce Annual Report for 2025-26.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request additional information from the Claremont Chamber of Commerce and/or City staff.

FINANCIAL REVIEW

Compensation under the previous agreement between the City and the Claremont Chamber of Commerce was $60,000 per fiscal year for 2024-25 and 2025-26. The City entered into a new agreement with the Chamber for 2026-27 and 2027-28 in which the City will continue to compensate the Chamber $60,000 per fiscal year for Visitor Center services. This funding was included in the adopted 2026-28 General Fund Operating Budget.

The staff cost to prepare this report and administer this contract is estimated at $600 and is included in the operating budget of the Administrative Services Department.

ANALYSIS

The Chamber has prepared an Annual Report (Attachment) outlining the services it rendered to the City in 2025-26. Staff has evaluated the Chamber's report and finds the Chamber to be in compliance with the terms of the agreement. The annual report is broken down into sections according to the agreement and provides actions taken to meet each requirement during the year, with corresponding quantitative data where applicable. Below is an outline of the services provided by the Chamber:

- The Chamber continued to respond to inquiries from the general public by providing information on a variety of subjects including, but not limited to, business and business opportunities, City government services and procedures, City projects, visitor and new resident information, and demographics, particularly as those inquiries related to business. In 2025-26, the Chamber responded to 31,457 inquiries via phone, walk-ins, and brochure distribution.
- In addition to managing several social media pages, the Chamber managed a website with a full range of information, including links to City Council, Commission, and Committee meeting schedules and special events. The Chamber website had 164,000 page views in 2025-26.
- The Chamber produced and distributed City, visitor, and business information materials. The information disseminated included, but was not limited to, the Chamber's Business and Community Directory; City and Village maps; and Friday Nights Live band listings. The total kiosk dissemination of material for 2025-26 was 1,250 brochures.
- The Chamber promoted the City and its businesses through a variety of outlets. In 2025-26, the Chamber promoted both the City and its businesses at Claremont Heritage, the Claremont Colleges, Claremont Hotels, shopping centers, and many stores and other facilities that have materials available to the general public. The total material dissemination at all distribution points was 7,500 in 2025-26.
- The Chamber was responsible for developing, coordinating, and advertising events. The Chamber coordinated the annual Village Venture Arts & Crafts Festival, which included 383 vendors and was estimated to attract over 23,000 visitors. Other events include Friday Nights Live and ribbon cuttings, of which there were 16 of in 2025-26.
- The Chamber continued the Claremont Gift Card program with $62,136 in sales. The program currently includes 49 participating businesses.
- The Chamber worked with the Claremont Police Department to promote the Citywide Business Watch Program and sent out 10 crime alerts to Chamber members.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, General Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Katie Wand
Acting Assistant City Manager

Attachment:
2025-26 Visitor Center Services Report

CITY OF CLAREMONT

CLAREMONT CHAMBER OF COMMERCE SERVICES ANNUAL REPORT
July 1, 2025, through June 30, 2026

Pursuant to the Agreement for Claremont Chamber of Commerce Services made on the 15th day of June 2022 between the City of Claremont and the Claremont Chamber of Commerce, the Chamber is pleased to provide the following Annual Report for services rendered during the period of July 2025 through June 2026.

Introduction

The Claremont Chamber of Commerce serves as a central hub for information, resources, and engagement on behalf of the City of Claremont. Through the Visitors Information Center, website, social media, printed materials, and a wide range of outreach efforts, the Chamber provides residents, businesses and visitors with timely and accurate information about the community. These services not only address day-to-day inquiries but also enhance Claremont's visibility, support local businesses, and promote the City as a welcoming place to live, work, and visit. The following section outlines the scope of these efforts and the measurable impact achieved during the period from July 2025 to June 2026.

2025–2026 At a Glance

During the reporting period, the Claremont Chamber of Commerce continued to serve as a key partner to the City in visitor services, business support, tourism promotion, community engagement, and economic development.

Highlights included:

- **31,457** responses to public inquiries
- **164,000** Chamber website page views
- **506,800** Instagram accounts reached - **increase of 112%** from prior year
- **17,618** social media followers
- **23,000+** attendees at Village Venture - **increase of 130%** over prior year
- **383** Village Venture vendors
- **175** business visits
- **16** ribbon cuttings supporting new businesses - **increase of 23%** over prior year
- **49** businesses participating in The Claremont Card
- **1,212** eGift Cards purchased
- **$56,556** in eGift Card value generated

A. Visitors Information Center

General information and services concerning the City:

1. **Respond to inquiries from the general public** by providing information on a variety of subjects, including, but not limited to, business and business opportunities, City government services and procedures, City projects, visitor and new resident information, and demographics, particularly as those inquiries relate to business. The objective is to handle all phone, walk-in, mail, and email inquiries in an efficient and informative manner in the classifications listed below.
    a. Inquiries continue to be managed daily at the Chamber office, in person, by telephone, and by email. Recorded activity figures for the Annual Report were as follows:
        i. Phone call inquiries:14,991 inbound calls, of which 9,776 were answered. The total number of outbound calls for this period is 12,931. The total number of all calls between July 1, 2025, and June 30, 2026, is 27,922.
        ii. Estimated walk-ins requesting general information: 5,000
        iii. Brochures through the Chamber outdoor kiosk: 1,250 (25 boxes out of 75)
        iv. Brochures taken from Chamber lobby: 2,500 (50 boxes out of 75)

        TOTAL RESPONSES TO INQUIRIES: 31,457
        Includes answered inbound calls, outbound calls, walk-in inquiries, and brochure distribution through the Chamber lobby and outdoor kiosk.
    b. Relocation Requests are set up on our Chamber website, where an email request is sent directly to contact@claremontchamber.org. Packets are then mailed within 24 hours of receiving the request.
        i. From July 1, 2025, to June 30, 2026, five phone calls were taken from those interested in moving to the city of Claremont and were facilitated by the CEO.

2. **Manage, update, and maintain the Chamber website** with a full range of information, including links to council, commission, and committee meeting schedules and special events, as provided. The objective shall be to update the website on a twice-a-month basis to receive as many "accesses" per year as possible.
    a. Number of successful Page Views on the Chamber Website for July 2025 – June 2026 was **164,000** (information from Google Analytics).
        i. We continue to add and update information on the Chamber website.
    b. **Top Viewing Cities** (See chart on next page)
    c. Permanent links on the website to the City of Claremont website.
    d. Permanent links on the Chamber website to the Claremont Colleges calendar.

TOP VIEWING CITY FOR WEBSITE	Prior Year	Current Year	YoY Change
Los Angeles	9,525	9,395	-1.4%
Claremont	2,823	3,035	+7.5%
San Jose	1,516	1,989	+31.2%
San Diego	1,144	694	-39.3%
Pomona	979	1,248	+27.5%
Upland	835	985	+18.0%
Rancho Cucamonga	718	850	+18.4%

3. **Social Media**
    a. Maintaining three (3) Facebook pages:
        i. Claremont Chamber of Commerce
        ii. Friday Nights Live
        iii. Village Venture
    b. Maintaining two (2) Instagram accounts:
        i. Claremont Chamber of Commerce
        ii. Village Venture
    c. The Chamber posted a total of **1,284 social media postings, excluding stories.**
    d. Number of accounts reached on the Claremont Chamber of Commerce Instagram for July 2025 – June 2026: **506,800**
    e. Number of followers as of June 2026: **17,618**

Year-Over-Year Comparison

MEASURE	2024–25	2025–26	Change
Website page views	74,000	164,000	+122%
IG Social reach	239,000	506,800	+112%
Village Venture attendance	15,000	23,000+	+130%
Business visits	100	175	+75%
Ribbon cuttings	13	16	+23%
Gift card businesses	36	49	+36%

4. **Produce, update, and maintain City, visitor, and business information.** These materials include our Business and Community Directory, City maps, and Village & retail center list.

   The Discover Claremont kiosk is located inside the Chamber, accessible on weekdays during regular business hours. The Discover Claremont kiosk syncs with the official visitor website and allows walk-in guests to plan their visit and download the Discover Claremont app on their smartphones, view a map of the City, and receive recommendations on places to go.

   In addition, many of our materials are housed in an outdoor “kiosk-type” brochure stand, allowing visitors to access information on weekends and days the Chamber office is closed.

   The kiosk is located outside the Chamber front door, where a variety of brochures and other seasonal information is provided for visitors.

   Materials available include:

   - Claremont Colleges and Village Maps
   - Friday Nights Live Band Listings
   - Hotels and Restaurants
   - Official Destination Guide & Business Directory
   - Parks, Arts & Museums
   - Quarterly Magazine

5. **Update the current distribution network** for distributing materials utilizing outlets throughout the region and within the city. The distribution materials are different for each type of distribution point.
    a. The regional distribution points include:
        i. Chamber and City offices, Claremont Heritage, any Claremont Colleges admission office that allows distribution materials, all Claremont hotels, and shopping centers throughout Claremont. The Chamber reviews new distribution points and works with City staff to update as needed.

6. **Dissemination to the Distribution Network:**
    a. We have given over **4,000 Discover Claremont information cards** to the colleges between July 1, 2025, and June 30, 2026.
    b. These distribution efforts extend the reach of the Visitor Information Center beyond the Chamber office, placing Claremont information directly in the hands of students, families, hotel guests, residents, and visitors throughout the community.
    c. **Claremont Colleges** (used for conferences, new student orientation, alumni weekend, etc.):
        i. Claremont McKenna
        ii. Pomona College
        iii. Scripps College
        iv. Harvey Mudd College
        v. Pitzer College
        vi. Claremont Graduate University
        vii. International Place at Pomona College
        viii. Keck Graduate Institute
        ix. Claremont Lincoln University
    d. **Claremont Hotels**
        i. Claremont Lodge
        ii. DoubleTree by Hilton Claremont
        iii. Hotel Casa 425
        iv. Motel 6
        v. Residence Inn
    e. **Shopping Centers throughout Claremont**

f. **Stores and other facilities that have materials available to the general public:**

i. Alexander Hughes Community Center
ii. California Botanic Garden
iii. City Hall
iv. Claremont Helen Renwick Library
v. Claremont Heritage
vi. Claremont Lewis Museum of Art
vii. Claremont Toyota
viii. Hendricks Pharmacy
ix. Joslyn Senior Center
x. Service Center for Independent Life
xi. Smart Property Services, Inc.
xii. Sotheby's International Realty Wheeler Steffen Real Estate
xiii. The Claremont Colleges Services
xiv. United Methodist Church
xv. The Webb Schools

The Chamber continues to oversee and review the Distribution Network and work with the distribution point staff members as needed.

Other information available at the Chamber upon request:

- Attorney and Legal Services
- California Botanic Garden
- Calendar of Events
- Chamber Business and Community Directory
- City Map
- Claremont After-School Programs Inc. / CLASP
- Claremont Facts & Figures
- Claremont Heritage Brochure
- Claremont Unified School District Information
- Claremont Wilderness Park Map
- Financial Services and Insurance
- Friday Nights Live Band Listing
- Health & Wellness
- Hotels
- Museum Brochures
- Parks, Art, & Theater
- Realtors
- Restaurants
- Schools
- Senior Living Communities
- Senior Services
- Utilities Information
- Village Map
- Visitors Guide and Directory
- Walking Map
- Worship

City Information

- Bi-Annual Budget Information
- City of Claremont Recreation & Activities Guide
- City Newsletter

Foothill Transit

- BusBook Schedule & Information Guide

Metrolink

- All Lines Timetables
- Metro Monthly and System Maps
- Metrolink How to Ride Guide

Colleges Calendar – Average of 60 distributed to the general public

Claremont Quarterly – Average of 50 per quarter distributed to the general public

Total Brochures Disseminated: 7,500

7. **Maintain the monthly and annual Calendar of Community Events:**
    a. Maintain a master monthly and yearly calendar in the Chamber office, available for public distribution upon request, which includes special events.
    b. Coordinate with local media on Chamber & business-related events. Local media may include the Claremont Courier, Inland Valley Daily Bulletin, Foothill Reader and Inland Empire Magazine.
    c. Monitor community events and potential conflicts through the Event Alert System.
    d. The calendar includes all monthly events and information regarding the City's monthly meetings, with all City contact information. This information is also available on the Chamber website.
    e. The monthly and annual Calendar of Events is continuously updated on the Chamber website.
    f. The Chamber has a Business and Promotional Event Calendar as well as Community and Member calendars available on the Chamber website.
    g. Chamber refers members to the Chamber Calendar to list their events.
    h. Posters of Chamber member events are displayed in the new Chamber display space outside the Chamber office.

8. **Develop events, entertainment, and activities** for the Village and other commercial areas with the assistance of the City and other business representatives.
    a. **Produced and managed the 43rd Annual Village Venture Arts & Crafts Festival**, one of Claremont's largest annual community events, held Saturday, October 25, 2025.
        i. Welcomed **23,000+ attendees**, compared with 10,000+ the previous year, representing an estimated **130% increase in attendance year over year**.
        ii. Hosted **383 vendors**, bringing artists, makers, food vendors, community organizations, and businesses together throughout the Claremont Village.
        iii. Coordinated the full event operation, including vendor participation, entertainment, volunteers, sponsorships, street closures, public safety coordination, marketing, and event-day logistics.
        iv. Village Venture brought thousands of residents and visitors into the Claremont Village, creating increased exposure and foot traffic for local businesses while showcasing Claremont as a regional destination.
    b. Designed and coordinated activities for the Village, Foothill Blvd. corridor, and other commercial areas throughout Claremont, with the assistance of the City.
    c. Began meeting regularly with the City, VMG, and other business representatives to discuss new opportunities for promoting the Village and its merchants city-wide.
    d. Explored opportunities to develop additional projects that promote and market Claremont merchants.
    e. Work with the Claremont Tourism Business Improvement District (TBID) Board to create and maintain a comprehensive marketing and outreach plan.
    f. The Chief Executive Officer (CEO) was a Board Member of the California Travel Association, the advocacy voice for California's travel and tourism agency through February 3, 2026, and has retained Bronze Level Membership to date.
    g. Press Releases were sent out to local media to attract vendors. The following media outlets were contacted:
        i. Inland Valley Daily Bulletin
        ii. Claremont Courier
        iii. San Gabriel Valley Tribune
        iv. Pasadena Star News / Whittier Daily News
        v. Visit California
        vi. Sunset Magazine
    h. **Friday Nights Live** – Sponsored and produced with co-sponsors, the City of Claremont and Tolkin Group.

i. Since April 2025, Robin Young has been contracted as the Band Coordinator, responsible for booking the entertainment.

ii. Bands played every Friday evening, 6 pm to 9 pm, from May to October.

iii. Venues: The Depot (Claremont Lewis Museum of Art), Village Square, and Shelton Park

i. The CEO continues to attend the Tourism BID Quarterly Meetings.

j. CEO oversees R. Antonette Communications, the consulting agency for the TBID.

k. Supplies Claremont information packets for FAM (familiarization) tours.

l. The CEO continues to visit businesses with the Mayor and has begun scheduling weekly business visits with the Chamber Board members and the Mayor. To date, over 105 businesses have been visited.

9. Event Partnerships and Community Engagement:

a. The Chamber expanded the role of the Visitor Information Center by using events and partnerships to bring residents and visitors into the space while connecting them with local businesses, restaurants, hotels, and attractions. Those activities were:

i. **Art Walk**, partnership with Claremont Village Marketing Group

1. Opened for 11 Art Walks with an average of 228 guests coming into the Visitors Center during each Art Walk

ii. **Wine Walk**, partnership with Claremont Village Marketing Group

1. Year one of participating as a Wine stop, welcomed 567 guests

iii. **Beer, Bites and Bubbles**, partnership with Claremont Village Marketing Group

1. Year one of participating as a Beer stop, welcomed 761 guests

iv. **The Atrium**, partnership with Lost Levels Arcade

1. Welcomed 128 players
2. Partnered with the Doubletree Hotel to offer players and their families a discount to encourage them to stay and spend locally.
3. Partnered with 5 restaurants to offer players discounts.
4. Sponsored the creation of badges for all players and assembled welcome bags for them.

v. The Claremont Colleges Annual Welcome Back Event

1. Staffed a booth and distributed coupons for restaurants in Claremont and information on places to visit throughout town.

vi. Small Business Saturday

1. Hosted our first Open House, welcoming 75 guests.

2. Offered a scavenger hunt to encourage spending in Claremont

vii. National Small Business Week

1. Hosted events to intentionally invest in owners and their employees.

10. **Provide outreach efforts with other commercial centers** to develop joint marketing and advertising campaigns and visitor information materials, promoting such centers as attractive alternatives to the Village area.

11. **Opened The Claremont Store in December 2025**

a. Opened The Claremont Store in December 2025 following renovation of the space with support from the TBID, creating a dedicated retail component within the Visitor Information Center featuring Claremont- and Route 66-branded merchandise.

b. Maintained for sale a licensed City logo and Discover Claremont logo'd merchandise and souvenirs.

i. Pricing of all souvenirs are on display inside the Chamber office.

ii. The Chamber gift shop offers:

1. Baseball caps
2. Camper cups
3. Keychains
4. License plate frames
5. Postcards
6. Posters
7. Stickers
8. Sweatshirts
9. T-shirts
10. Tote bags
11. Socks
12. Claremont Heritage books
13. Route 66 T-Shirts
14. Route 66 Sweatshirts
15. Route 66 Tote bags
16. Route 66 Enamel mugs
17. Route 66 Keychains

12. **The Claremont Card**

a. The Claremont Gift Card Program, featuring new digital gift cards for sale online through the Chamber's website and advertised across the Chamber's proprietary channels.

b. Enhanced "The Claremont Card" webpage to include information on shop local movement, FAQ for The Claremont Card and older physical gift card participating merchants, and links to the Chamber branded purchase page (hosted by Yiftee).

c. Continued to administer a reimbursement program for participating merchants on the physical gift card program who are still active Chamber members.

d. As of June 30, 2026, 49 participating businesses were active on The Claremont Card, with a total of 1212 eGift Cards purchased. This constitutes a **36.11% increase** in the number of participating businesses and **954% increase** in the number of transactions from 2025 to 2026.

e. Print and update the list of participating merchants that accompany purchased cards and are posted on the website monthly.

f. Laminated signs and/or stickers are provided to participating members for display in the store/business.

g. Information regarding this program is listed in the Chamber membership packets, on the Chamber website, and occasionally in the weekly Chamber e-Newsletter.

h. **$62,136** in total gift card value generated during the reporting period, including **$56,556** through the new digital Claremont Card and **$5,580** in physical gift cards.

B. Business Support Services

On behalf of the City of Claremont, the Claremont Chamber of Commerce works to attract, retain, and provide comprehensive business services for the City's local merchants and entrepreneurs. The following is an overview of services offered for the benefit of the City under the terms of this agreement.

1. **Business Outreach and Visitation** Chamber leadership conducted **175 business visits** in partnership with the Mayor, City representatives, and Chamber Board members, providing opportunities to hear directly from businesses, identify needs and challenges, share available resources, and strengthen communication between businesses, the City, and Chamber.
2. **Ribbon Cuttings** The Chamber conducted **16 ribbon cutting ceremonies**, a **23% increase** year over year, welcoming and promoting new and expanding Claremont businesses.
3. **Participate in the Agency's Business Visitation Program** by having a Chamber representative accompany Agency and City representatives on visits to existing or potential Claremont businesses as requested by the City.
    a. Ribbon Cutting Ceremonies (16) promoting "New Businesses" in Claremont.
2. **Develop assistance programs** utilizing Chamber staff and resources to facilitate and coordinate meetings with City officials and merchants on matters of business interest or concern to encourage creative and cooperative dialogue leading to potential solutions to business and economic development issues.
    a. The CEO meets with the City Manager monthly and has regular communication with the Assistant City Manager and City Staff.
3. **Assist in the development and distribution of materials** relating to the City and projects in the form of a new Business Welcome Package, and work with the City to disseminate this information.
    a. Agency and Small Business Assistance Program materials are available at the Chamber office.
    b. The Agency and Small Business Assistance Program is advertised in the Chamber newsletter.
4. **Work with the Claremont Police Department (CPD).** Promote the City-wide Business Watch Program through various management initiatives, including newsletter articles, workshops, and seminars focused on business crime, crime prevention, and safety-related issues.
    a. Meet with the Chief of Police as needed to discuss retail areas that may be experiencing crime issues.
    b. Continue to send Crime Alerts to businesses when received from CPD.
    c. Ten Crime Alerts received from CPD were distributed to Chamber members during the reporting period.

In addition to formal business visits, Chamber staff regularly served as a first point of contact for businesses seeking assistance navigating City processes, identifying resources, making connections, and addressing business-related questions

C. Submit an Annual Report to the City, due by October 1

1. The report includes an accurate and complete record of the number and nature of public inquiries and progress on other goals and business support services required in this Agreement as conducted in the preceding year.
2. Present the Annual Report to the City Council on an agreed-upon meeting date.
3. Occasionally, brief the City Council on other areas of mutual interest or reportable items as requested by the City.
4. A Chamber representative shall be made available to attend any City Council meeting at the request of City staff on areas pertaining to the Claremont Chamber and businesses.

Looking Ahead: 2026–2027

As we look ahead, the Claremont Chamber of Commerce remains committed to strengthening our partnership with the City of Claremont and continuing to serve as a resource and connector for our business community, residents, and visitors. Building on the work of the past year, our priorities for 2026–2027 include:

1. Strengthen Business Outreach and Relationships
Continue regular business visits throughout all commercial areas of Claremont and establish consistent tracking of visits, issues identified, referrals made, and follow-up provided. These conversations will help us better understand what businesses are experiencing, identify opportunities and challenges, and connect businesses with available City and Chamber resources.

2. Increase the Visibility and Use of the Visitor Information Center
Continue developing the Chamber office as Claremont's Visitor Information Center and a welcoming first stop for visitors, new residents, students, families, and community members. This includes improved signage, expanded visitor resources, and increased awareness of the services available through the Center.

3. Expand the Reach of Discover Claremont Information
Strengthen the distribution of visitor guides, maps, Discover Claremont materials, and community information throughout Claremont and the surrounding region. We will continue developing relationships with the Claremont Colleges, hotels, attractions, businesses, and other community partners to help visitors discover more of Claremont.

4. Grow The Claremont Card and Support Local Spending
Build on the significant growth of The Claremont Card by increasing merchant participation, expanding community awareness, and creating additional opportunities to encourage residents, visitors, employers, and organizations to spend locally. The program grew to 49 participating businesses and generated $56,556 in eGift Card value during the reporting period, providing a strong foundation for continued growth.

5. Strengthen Communication Between the City and Business Community
Continue serving as a connector between local businesses and the City by sharing timely information, identifying business concerns and opportunities, facilitating conversations, and helping businesses navigate available resources. Regular communication with City leadership and staff will remain an important part of this work.

6. Improve Measurement and Reporting of Our Impact
Continue strengthening how we track visitor inquiries, business outreach, website and social media engagement, event participation, visitor material distribution, and other services provided under the City agreement. Better measurement will allow the Chamber and City to evaluate trends, identify opportunities, and demonstrate the impact of our partnership from year to year.

As we enter the next year of our partnership, our focus is not simply on doing more, but on continuing to **strengthen how we serve**. We look forward to working alongside the City, our businesses, community partners, and residents to support a strong local economy, welcome visitors to Claremont, and ensure our business community remains connected, informed, and supported.

Claremont City Council

Agenda Report

File #: 6194 **Item No:** 5.

TO: ADAM PIRRIE, CITY MANAGER

FROM: JEREMY SWAN, COMMUNITY SERVICES DIRECTOR

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

AWARD OF CONTRACT TO FUEL EQUIPMENT SERVICES, INC. FOR THE ABOVE-GROUND STORAGE TANK PAINTING PROJECT (FUNDING SOURCE: MOTOR FLEET FUND)

SUMMARY

The City maintains three above-ground storage tanks at the City Yard that provide diesel and unleaded fuel for the City's fleet vehicles. These tanks are an essential component of the City's fleet operations and require routine maintenance to preserve their condition and extend their service life.

A recent inspection identified areas of rust on the tanks and associated piping, indicating the need for surface preparation and repainting to protect the equipment from further deterioration. The City solicited competitive quotes for this service and recommends the award of contract to Fuel Equipment Services, Inc.

RECOMMENDATION

Staff recommends the City Council authorize the City Manager to enter into a contract with Fuel Equipment Services, Inc. in the amount of $56,635 for the Above-Ground Storage Tank Painting Project.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request more information from staff.

FINANCIAL REVIEW

The total proposed contract cost is $56,635. Sufficient funding for the Above-Ground Storage Tank Painting Project is included in the 2026-27 Motor Fleet Fund operating budget.

This purchase complies with all City purchasing guidelines. Bid and contract documents are available for review in the City Clerk's office.

The staff cost to prepare this report and administer this project is estimated at $2,800 and is included in the operating budget of the Community Services Department.

ANALYSIS

The City maintains three above-ground fuel storage tanks at the City Yard that supply diesel and unleaded gasoline for the City's fleet vehicles. A recent inspection identified rust on the tanks and associated piping, highlighting the need for surface preparation and repainting to prevent further corrosion. The proposed project includes pressure washing the tanks and associated piping, removing existing decals, sanding and removing rust to the extent practicable, and preparing all surfaces for painting. Following surface preparation, the contractor will prime and apply two coats of EPA-approved epoxy paint to the three storage tanks and associated piping. The project also includes preparing and repainting the protective bollards surrounding the tanks and installing replacement tank decals once the paint has fully cured.

The City obtained three competitive bids for this project:

Bidder	Proposed Cost
Fuel Equipment Services, Inc.	$56,635
PF Services, Inc.	$59,525
George Bryant Construction, Inc.	$59,950

Based on the bids received, Fuel Equipment Services, Inc., of Montclair, California, submitted the lowest responsive bid.

Fuel Equipment Services, Inc., is a reputable local company with experience providing similar services to public agencies, including the cities of Claremont and Ontario. Awarding the contract to Fuel Equipment Services, Inc. will allow the City to complete the necessary maintenance to protect its fuel storage infrastructure and help extend the service life of the tanks and associated equipment.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Sustainable City Plan, Economic Sustainability Plan, General Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Jeremy Swan
Community Services Director

Prepared by:

Kristin Mikula
Community Services Manager

Claremont City Council

Agenda Report

File #: 6144 **Item No:** 6.

TO: ADAM PIRRIE, CITY MANAGER

FROM: JEREMY SWAN, COMMUNITY SERVICES DIRECTOR

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

AUTHORIZATION TO AMEND THE EXISTING AGREEMENT WITH MCE CORPORATION TO INCREASE COMPENSATION FOR RIGHT-OF-WAY LANDSCAPE MAINTENANCE SERVICES (FUNDING SOURCE: LANDSCAPE AND LIGHTING DISTRICT FUND)

SUMMARY

In May 2022, the City Council awarded a contract to MCE Corporation for right-of-way landscape maintenance. The current contract with MCE Corporation will expire in May 2027. During the construction of the Towne Avenue Master Plan Improvement Project, Towne Avenue was removed from their contract. The contractor responsible for construction of the Towne Avenue project was also required to complete a one-year landscape maintenance and establishment period. The establishment period has ended, and MCE Corporation is now responsible for landscape maintenance on Towne Avenue. Staff recommends adding Towne Avenue back into the scope of work of the existing contract with MCE Corporation at a cost of $118,548 for the remaining term of the contract.

Staff has also observed increased litter accumulation along the I-10 Freeway on- and off-ramps at Indian Hill Boulevard, resulting in more frequent requests for service from the community. To provide more consistent maintenance of the area, staff recommends increasing litter abatement services at this location from two days per week to three days per week. The additional litter abatement service would increase the existing contract with MCE Corporation by $20,250 for the remaining term of the contract. Combined with the other service increases described above, the proposed changes would result in a total contract increase of $138,798 through May 2027.

The approved annual contract for right-of-way landscape maintenance services is $447,585, plus $50,000 for irrigation repairs and plant replacement, for a total amount not to exceed $497,585. To account for maintenance costs in 2026-27 that exceed the approved contract amount, staff recommends amending the existing agreement to increase compensation by $138,798, which will bring the total not-to-exceed amount to $636,383 for right-of-way maintenance for the duration of the

contract.

RECOMMENDATION

Staff recommends the City Council:

A. Authorize the City Manager to execute an amendment to the existing agreement with MCE Corporation increasing compensation by $138,798, for a total not-to-exceed amount of $636,383 for right-of-way maintenance for the duration of the contract; and

B. Appropriate $138,798 from the Landscape and Lighting District Fund to fully fund the agreement.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request additional information from staff.

FINANCIAL REVIEW

The existing contract for right-of-way maintenance with MCE Corporation totals $497,585 annually and is included in the Landscape and Lighting District (LLD) budget. Staff recommends appropriating $138,798 from the Landscape and Lighting District Fund to fund the additional costs associated with Towne Avenue maintenance and increased litter abatement services along the I-10 Freeway on- and off-ramps at Indian Hill Boulevard.

The staff cost to prepare this report and administer this contract is estimated at $1,610 and is included in the operating budget of the Community Services Department.

ANALYSIS

In May 2022, the City Council awarded MCE Corporation the contract for citywide right-of-way landscape maintenance. The contract included the maintenance for Towne Avenue until the Towne Avenue Master Plan Improvement Project began. Once the project began, this portion of the contract was removed from MCE Corporation's scope of work and was transferred to Gentry Brothers, the contractor responsible for the construction of the Towne Avenue Master Plan Improvement Project. Towne Avenue has been under the maintenance and establishment period as required under the agreement with Gentry Brothers' sub-contractor, So Cal Landscape. This maintenance and establishment period has now concluded.

Staff worked closely with MCE Corporation to develop a scope of work to maintain the new landscaping on Towne Avenue. The cost includes weekly service of Towne Avenue including, but not limited to, litter abatement, trimming of shrubs and groundcover, cleaning of hardscaped areas, debris removal, and irrigation testing and repairs. Prior to the Towne Avenue Master Plan Improvement Project, the maintenance area measured approximately 17,500 square feet. The current maintenance area measures approximately 329,300 square feet. The proposed cost to maintain Towne Avenue is $118,548 for the remainder of the contract term.

Currently, MCE Corporation provides litter abatement on the I-10 Freeway on- and off-ramps at Indian Hill Boulevard twice per week. Staff has recently observed increased litter accumulation in this location, resulting in more frequent requests for service from the community. To provide more

consistent maintenance of the area, staff recommends increasing litter abatement services at this location from two days per week to three days per week. These services include, but aren't limited to, litter and debris removal, disposal of collected materials, light trimming of landscape, and cleanup of hardscape areas adjacent to landscaped areas as needed. The cost to increase services is $20,250 for the remaining term of the contract.

Staff recommends amending the agreement with MCE Corporation, increasing compensation by $138,798 to include Towne Avenue landscape maintenance and increased litter removal at the I-10 Freeway on/off ramps. These increased services levels will be included in the scope of work when the City releases a Request for Proposals (RFP) for Right-of-Way Landscape Maintenance Services in early 2027.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Sustainable City Plan, Economic Sustainability Plan, General Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:	Prepared by:
Jeremy Swan Community Services Director	Cari Dillman Community Services Manager

Claremont City Council

Agenda Report

File #: 6189 **Item No:** 7.

TO: ADAM PIRRIE, CITY MANAGER

FROM: KATIE WAND, ACTING ASSISTANT CITY MANAGER

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

AUTHORIZATION TO ENTER INTO AN AGREEMENT WITH SHI INTERNATIONAL CORP. FOR MICROSOFT OFFICE 365 LICENSING AND APPROPRIATION OF FUNDS (FUNDING SOURCE: TECHNOLOGY FUND)

SUMMARY

Microsoft Office 365 supports the City's daily operations through email, document creation and management, secure access to cloud-based applications, and centralized identity and device management. Renewing the City's licensing will maintain these services and accommodate increased staffing, additional City-issued mobile devices, and updated licensing needs.

Staff solicited quotes from three qualified Microsoft partners and identified SHI International Corp. as the most qualified and lowest-priced provider. Staff recommends that the City Council authorize a 36-month agreement with SHI International Corp., at a total estimated cost of $298,197, including contingency and anticipated sales tax, and approve the renewal of the City's participation in a joint Microsoft Enterprise Agreement for the period of December 1, 2026, through November 30, 2029. An appropriation of $36,067 from the Technology Fund balance is recommended to fully fund the first two years of the agreement. Funding for the third year will be included in the proposed 2028-29 operating budget.

RECOMMENDATION

Staff recommends the City Council:

A. Authorize the City Manager to enter into a 36-month agreement with SHI International Corp. to provide Microsoft Office 365 licensing in the amount of $265,832, plus a five percent contingency and applicable sales tax in the amount of $32,365, for a total contract amount of $298,197;
B. Appropriate $36,067 from the Technology Fund balance to fully fund the first two years of the agreement; and
C. Authorize the City Manager to execute the required documents to renew the City's enrollment

with Microsoft Corporation as part of a joint Microsoft Enterprise Agreement.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request additional information from staff.

FINANCIAL REVIEW

The quoted cost of the 36-month agreement with SHI International Corp. is $265,832, excluding applicable taxes. Staff recommends including a five percent contingency of $14,200 for future licensing needs, bringing the total cost before taxes to $280,032 to be paid over three annual payments.

Beginning January 1, 2027, Senate Bill 122 expands the application of California sales and use tax to qualifying digital products, including electronically delivered and remotely accessed prewritten software. For budgeting purposes, staff anticipates that applicable taxes will be applied on the second and third payments of the agreement. Based on the current tax rate of 10.25 percent, estimated taxes total $18,165 over those two years, including an allowance for taxes on additional licensing purchased using the contingency. The total estimated cost of the agreement, including contingency and anticipated taxes, is $298,197. Actual tax costs will depend on the applicable tax rate and taxable purchases.

The current Administrative Services budget includes funding of $80,276 for 2026-27 and $79,276 for 2027-28 for Microsoft Office 365 licensing. The agreement will consist of three annual payments, each due on December 1 of the corresponding year. The estimated first-year cost, including contingency, is $93,041, requiring an additional appropriation of $12,765. The estimated second-year cost, including contingency and anticipated taxes, is $102,578, requiring an additional appropriation of $23,302. Staff recommends appropriating a total of $36,067 from the Technology Fund balance to fully fund the first and second years of the agreement. Funding for the third year, estimated at $102,578, will be included in the proposed 2028-29 operating budget.

	Base Yearly	Sales Tax	Contingency	Yearly Total	Budgeted	Unfunded
Year 1 (12/1/26-11/30/27)	$88,611	$0	$4,431	$93,041	$80,276	$12,765
Year 2 (12/1/27-11/30/28)	$88,611	$9,083	$4,885	$102,578	$79,276	$23,302
Year 3 (12/1/28-11/30/29)	$88,611	$9,083	$4,885	$102,578		
Totals	$265,832	$18,165	$14,200	$298,197	$159,552	$36,067

The increase in Microsoft 365 licensing costs is driven by three primary factors: additional licenses required to accommodate increased City staffing, expanded device management licensing to support the growing number of City issued mobile devices, and adjustments to licensing types to align with Microsoft's licensing structure and the specific services required by employees. These changes ensure that staff have access to the appropriate Microsoft services while maintaining centralized device management, security, and compliance with City technology standards.

The services were quoted by three Microsoft Corporation partners to ensure that the City of Claremont receives the best price for these services. This purchase complies with all City purchasing guidelines. Bid and contract documents are available for review in the City Clerk's office. The staff

cost to prepare this report and administer this contract is estimated at $2,054 and is included in the operating budget of the Administrative Services Department.

ANALYSIS

In 2014, the City purchased Microsoft Office 365 licensing from an approved reseller and migrated the City's email server to a Microsoft cloud hosted solution. Microsoft Office 365 allows staff to complete daily tasks and efficiently conduct business in a manner consistent with current technology and organizational practices. This includes email communications and the creation and management of documents, reports, spreadsheets, and presentations. The platform also supports centralized identity management through Microsoft Entra ID, which authenticates users and manages access to various cloud-based software applications used by the City. As the City has transitioned additional services to cloud-based applications, this identity platform has become an integral component of the City's technology infrastructure, supporting secure access and consistent user account management across connected systems.

Staff solicited quotes from qualified partners and received three responses. Staff determined SHI International Corp. was the most qualified and lowest priced option and therefore recommends entering into an agreement with SHI International Corp. to provide Microsoft Office 365 licenses to the City. Below are the quotes received from each vendor.

Vendor Name	Annual Cost	Total Cost for 36 Month Term
SHI International Corp.	$88,611	$265,832
Insight Enterprises, Inc.	$89,181	$267,543
Dell Technologies Inc.	$91,116	$273,347

These prices do not reflect the 5% contingency, nor the anticipated charge for sales tax due to SB122 due to take effect January 1, 2027.

Since Microsoft does not sell Office 365 licensing directly to consumers, upon City Council approval, the City must enter into an Enterprise Agreement between the three parties: Microsoft Corporation, an approved Microsoft Corporation Partner, which in this case, would be SHI International Corp., and the City. The City will also enter into a separate agreement with SHI International Corp. for the required licenses. SHI International Corp. will invoice the City directly, and the City will remit payment directly to SHI International Corp.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, General Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Katie Wand
Acting Assistant City Manager

Prepared by:

Andrew Erickson
Information Technology Officer

Claremont City Council

Agenda Report

File #: 6200 **Item No:** 8.

TO: ADAM PIRRIE, CITY MANAGER

FROM: DAVID CRABTREE, INTERIM COMMUNITY DEVELOPMENT DIRECTOR

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

HISTORICAL PROPERTY (MILLS ACT) AGREEMENT REQUEST #26-MA04, BETWEEN THE CITY OF CLAREMONT AND ALAN C. MILLER AND KRISTIN J. MILLER, PROPERTY OWNERS OF 1399 VIA ZURITA STREET

SUMMARY

The owners of the property at 1399 Via Zurita Street have submitted a request to enter into a Historic Property (Mills Act) Agreement with the City. The Mills Act is a preservation tool enacted by the state legislature to ensure the long-term preservation of eligible historic properties and other significant site features of such properties. In return, property owners receive a reduction in taxes, which in turn helps finance needed repairs and renovations for the property.

On September 9, 2026, the Architectural and Preservation Commission reviewed the proposed agreement and voted unanimously to recommend approval of the subject Mills Act request. The City Council serves as the final decision-making authority for Mills Act applications and will consider the proposed agreement for final action at this meeting.

RECOMMENDATION

Staff recommends the City Council:

A. Authorize the City Manager to execute the Historical Property (Mills Act) Agreement between the City of Claremont and Alan C. Miller and Kristin J. Miller, property owners of 1399 Via Zurita Street; and

B. Find this item is exempt from environmental review under the California Environmental Quality Act (CEQA).

ALTERNATIVES TO RECOMMENDATION

In addition to the recommendation, there are the following alternatives:

A. Continue the discussion and request additional information.
B. Make revisions to the proposed Mills Act Agreement and approve the agreement as revised.
C. Deny Mills Act Agreement #26-MA04.

FINANCIAL REVIEW

The costs associated with the review of this application have been borne by the applicant.

ANALYSIS

Upon approval of a Mills Act historical property contract (Attachment A), the value of the subject property is reassessed based on a formula that considers the rental income that could be expected from the property, the federal home loan interest rate, a historic property risk component, and an amortization component to result in a special Mills Act capitalization rate. The total tax savings for the property owners is determined by using the formula outlined in Attachment C, which also estimates the anticipated tax savings for the property owners/applicants. With approval of a Mills Act contract, the value of property tax savings must be used to fund the scope of work, identified in Attachment A, to preserve or rehabilitate the historic character-defining elements of the property and ensure its ongoing historical and structural integrity. Approval of a Mills Act contract will also result in a minor loss of tax revenue to the City. This loss represents the City's contribution to ensuring the property's preservation for the benefit of the community.

Staff has prepared estimates of the anticipated tax savings (Attachment C) for the owner and the loss in property tax revenue to the City if the Mills Act agreement is approved. The calculations estimate a potential tax savings to the owners of $6,317 per year ($63,172.22 for ten years), and a potential loss to the City in property tax revenue of $733 per year. In addition to the loss of revenue to the City, the contract will also result in a loss of revenue to the other local, regional, and state agencies, and districts that receive a portion of property taxes paid.

Background

What is the Mills Act?

The Mills Act is a preservation tool created by the California state legislature in 1972 to encourage the preservation and restoration of historic properties. The act enables cities to enter into historical property agreements with owners of qualifying properties to reduce owners' property taxes in order to incentivize investment in their historic property. While resulting in some lost property tax revenue, the agreements provide benefits to cities in that they ensure preservation, high-quality rehabilitation, and maintenance of historic properties that represent important cultural resources.

As provided for by State law, the Mills Act is administered and implemented by local governments. Mills Act contracts are executed between the property owner and the local government granting the tax reduction. Cities have considerable discretion in evaluating Mills Act requests and are not mandated to approve historical property agreements. Each local government establishes their own eligibility criteria, application procedures, and the number of contracts to allow within their jurisdiction. The California Office of Historic Preservation (OHP) does not participate in the contract negotiations,

is not a signatory to the contract, and has no authority over the administration of the Mills Act program.

City's Mills Act Program

In October 2000, the City Council approved procedures and review criteria for agreements for properties in Claremont. Initially, the program was restricted to historic properties suffering severe deterioration and in danger of near-term demolition or eventual demolition due to long term neglect. In January 2009, the City Council revised the review criteria to include all residential properties listed in the City's Register of Structures of Historic and Architectural Merit of the City of Claremont (Register). In addition, the Council limited the maximum number of Mills Act contracts that can be approved to six per year.

On October 9, 2012, the City Council amended the program once more to provide clarification on one of the review criteria, and to establish an annual compliance review fee. These newly revised criteria and procedures are included as Attachment D (City Council Resolution 2012-75).

Property Description

The subject property is located on the southwest corner of the intersection of Via Zurita Street and Via La Selva, which is near the corner of Foothill Boulevard and Indian Hill Boulevard. The property has a General Plan Designation of Residential 6 and is zoned Single-Family Residential 10,000 (RS 10,000).

Located at 1399 Via Zurita Street and constructed in 1926, the residence is an example of Spanish Colonial Revival architecture found in Claremont as a popular style built from 1915 to 1940.

The character-defining features of both the exterior and interior of the home were identified through a site visit to the property. The primary residence is a one-story, Spanish Colonial Revival style structure with textured white stucco, red clay tile roofing, and a front porch. The front porch area is enclosed by low stucco walls. Defining features of the exterior include a mixture of low-pitched gable roofs and higher pitched shed roofs with no overhangs, a front porch enclosed by low stucco walls and recessed windows with stucco lintels. The interior features include signs of renovations made over the years. These include exposed ceiling joists, textured stucco walls, and tongue and groove wood ceilings.

The home is in relatively good shape and, with appropriate restoration and repair, can continue conveying its historical appearance and significance.

Proposed Work Plan

The applicants have proposed a sensible work plan that addresses both the home's exterior and interior and will rehabilitate some of the home's character-defining features while also enhancing the integrity of the property and bringing portions of the home closer to their original historic appearance. A detailed description of the proposed improvements is included in the Draft Mills Act Contract (Attachment A) with a summary provided in this report.

With approval of a Mills Act Contract, the applicant would complete the removal of the wood trellis cover; remove and install twenty-seven windows with new lintels to match existing windows; and install French doors in the living room and den. The applicant is proposing replacement of the

existing windows that are either wood or aluminum to all high-quality aluminum. The cost of the proposed work items would exceed the property tax savings over ten years.

Qualifying Criteria and Staff Evaluation

Pursuant to Section 130 of City Council Resolution No. 2012-75, a historical property contract may be approved only if all the following criteria are met:

A. *The subject property meets the eligibility requirements for a Mills Act contract pursuant to California Government Code Section 50280.1 in that it is a privately owned property which is not exempt from property taxation, and is listed on the National Register of Historic Places, located in a National Register or local historic district, listed in a state or county official register of historic or architecturally significant sites, places or landmarks, or listed in the Register of Structures of Historic and Architectural Merit of the City of Claremont.*

The subject property is privately owned by the applicants (Alan and Kristin Miller) and is not exempt from property taxation. The subject property is listed in the Register of Structures of Historic and Architectural Merit of the City of Claremont. The property's architectural and historical significance satisfies the Mills Act eligibility requirements. It should be noted that the property consists of two independent lots. The first is the site of the house, front yard driveway, garage, and rear yard. A second adjacent lot is developed with a pool, patio, and landscaping. Because there is no historic residence on the second parcel, it is not included as part of this Mills Act Contract.

B. *The subject property contributes significantly to the quality, diversity, historical interest, and ambience of the community.*

The existing residence contributes significantly to the quality, diversity, and historical ambience of Claremont. Constructed in 1926, the residence represents a great example of Spanish Colonial Revival architecture, especially given its location within the small Via Zurita Street neighborhood, which contains many custom houses of various architectural styles, four of which are listed on the Claremont Register.

The home has a Spanish California architectural style that was intentionally chosen by Jose Pijoan, a Barcelona born, Pomona College professor of Hispanic Civilization, who is credited with engaging Jose Clemente Orozco to paint his famous Prometheus mural on the campus. Later, the property served as the home of Millard Sheets, one of Claremont's best-known residents due to his very high-profile career as artist, mosaicist, muralist, and designer of savings and loan buildings.

C. *Significant features that defined the historical character of the subject property, and its buildings have not been destroyed or can be restored based on documentary, physical, or pictorial evidence.*

The significant character-defining features of the subject property have largely been preserved, and the proposed window changes are intended to unify and upgrade the windows, which are a character -defining feature of the residence that have been inconsistently modified over the last few decades. The proposed window upgrades will increase the livability of the residence and improve the exterior appearance with consistent window material, style, and color. Additionally, replacing the existing sliding door with French doors constructed of materials consistent with the windows, along with removing the interior board and batten wall paneling in the den, will help maintain the property's functionality while enhancing its architectural consistency with the Spanish Colonial style.

The home exhibits a high level of integrity in design, materials, workmanship, and setting-ensuring that its historic character has not been lost and, where necessary, can be restored using documentary and physical evidence such as that found in Attachments E and G.

D. *The owner of the subject property proposes to make improvements that are related to preservation and/or rehabilitation of character-defining elements and/or historical and structural integrity of the property. Additionally, the cost of such improvements must be equal to or greater than the expected property tax savings for the first ten years, which needs to be distributed into two five-year periods.*

Improvements proposed by the applicant include replacing all windows, removal of a trellis added to the front façade of the home, and removal of inappropriate interior wall panels; all of which contribute to preservation of character-defining elements and improved livability of the home. The estimated cost of these improvements exceeds the expected property tax savings. The details of the planned improvements are listed in Attachment F.

In completing the proposed work items with the benefit of a historical property contract, the property's ability to continue contributing to the historical interest and ambience of the Claremont community will be enhanced. The applicant has proposed a sensible work plan that would help ensure the home's long-term livability and restore some of its key historic features.

Based on estimates provided by the applicant, the total cost of the proposed scope of work is approximately $79,451, which equates to roughly 26% over the estimated savings of $63,172.22 that would result from the historical property contract over a ten-year period. With the signing of the historical property contract, the applicant would be required to invest the avoided property tax into the work outlined in Attachment A. Additionally, based on the proposed scope of work, the applicant would be contributing more of their own funds into the proposed work than they would be saving through their reduced property taxes.

E. *The subject property is residential.*

The subject property is a single-family residential property located in the RS 10,000 zoning district. The property remains in residential use, consistent with the Mills Act's residential eligibility criteria.

CEQA REVIEW

The proposed scheduled improvements within the contract are categorically exempt from the California Environmental Quality Act (CEQA) pursuant to Section 15331 in that these improvements are for the restoration and rehabilitation of a historical resource, will be conducted in a manner consistent with the Secretary of the Interior's Standards of the Office of Historic Preservation of the Department of Parks and Recreation, United States Secretary of the Interior's Guidelines for Rehabilitation of Historic Properties, and the State Historical Building Code and will be subject to applicable City permitting requirements. Therefore, no further environmental review is necessary.

COMMISSION REVIEW

The Architectural and Preservation Commission reviewed and voted unanimously to recommend approval of the agreement on September 9, 2026. The Commission's resolution is Attachment B.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Adam Pirrie
City Manager

Reviewed by:

Christopher Veirs
City Planner

Prepared by:

Jordan Goose
Associate Planner

Attachments:
A - Draft Mills Act Contract
B - APC Resolution
C - Estimated Tax Savings Calculation
D - Adopted Procedures for Review & Approval of Historic Property Contracts
E - Photo Survey
F - Improvement Plan
G - Historical Documentation

RECORDING REQUESTED BY
AND WHEN RECORDED RETURN TO:

CITY OF CLAREMONT
Attn: City Clerk, City of Claremont
207 Harvard Avenue
P.O. Box 880
Claremont, CA 91711

HISTORICAL PROPERTY (MILLS ACT) AGREEMENT

THIS AGREEMENT is made this _____ day of _____, 2026 by and between the CITY OF CLAREMONT, a municipal corporation of the State of California ("City") and Alan C. Miller and Kristin J. Miller, owners of real property located at 1399 Via Zurita Street, Claremont ("Owners").

RECITALS

WHEREAS, the City Council of the City of Claremont ("City Council") is authorized by California Government Code Section 50280 et seq. (known as "the Mills Act") to enter into contracts with the owners of qualified historical properties to provide for appropriate use, maintenance, and rehabilitation such that these historic properties retain their historic characteristics; and

WHEREAS, on October 24, 2000, the City Council adopted Resolution No. 2000-157 establishing review criteria and procedures for historical property (Mills Act) contracts to encourage historical preservation, and on January 13, 2009, the City Council adopted Resolution No. 2009-04 expanding the review criteria for historic property (Mills Act) contracts; and

WHEREAS, on October 9, 2012, the City Council adopted Resolution No. 2012-75 amending the review criteria for historic property (Mills Act) contracts that supersedes Resolution Nos. 2000-157 and 2009-04; and

WHEREAS, Owners possess fee title interest in real property, together with associated structures and improvements thereon, generally located at 1399 Via Zurita Street within the City and more particularly described in Exhibit A hereto attached and made a part hereof ("the Property"); and

WHEREAS, the Property is a qualified historic property within the meaning of Government Code Section 50280.1, in that it is a privately owned property that is not exempt from property taxation and is listed in the Register of Structures of Historical and Architectural Merit of the City of Claremont; and contains the character defining elements described in Exhibit "B"; and

WHEREAS, all of the required criteria of Section 130 of City Council Resolution No. 2012-75 are met; and

WHEREAS, both Owners and City, for their mutual benefit, desire to protect and preserve the Property so as to retain its characteristics of historical and architectural significance.

AGREEMENT

NOW, THEREFORE, both Owners and City, in consideration of the mutual promises, covenants and conditions contained herein and the substantial public benefits to be derived therefrom, do hereby agree as follows:

1. AUTHORITY: This Agreement is made pursuant to California Government Code Sections 50280-50290 and Article 1.9 (commencing with Section 439) of Chapter 3, Part 2, of Division 1 of the California Revenue and Taxation Code and is subject to all of the provisions of those statutes.

2. TERM: This Agreement shall be effective commencing on the date of this Agreement and shall remain in effect for a period of ten years therefrom. Such term shall be renewed pursuant to the provisions of paragraph six below.

3. PRESERVATION OF PROPERTY: During the term of this Agreement, the Property shall be subject to the following conditions, requirements, and restrictions:

a. Owners shall preserve and maintain the characteristics of historical significance of the Property, and, where necessary, restore and rehabilitate the Property and its character defining features, in accordance with the regulations of the Claremont Municipal Code Chapter 16.300 and in conformance with the rules and regulations of the Office of Historic Preservation of the Department of Parks and Recreation, United States Secretary of the Interior's Standards for Rehabilitation of Historic Properties, and the State Historical Building Code.

b. Prior to commencing work on physical changes to the property, Owners shall notify the Director of Community Development to ensure that the changes comply with all applicable standards and regulations. <u>All significant exterior building and site changes, and changes to the interior character defining features described in Exhibit "B" shall be subject to prior review by the City</u>.

c. Owners shall obtain building permits for all permitted work prior to commencing work. When applying for building permits, Owners shall inform Building Division staff that the Property is under a Mills Act contract so that the City can be assured all work will be done in the manner required by the City and federal historic preservation standards.

d. Owners agree to make several improvements to the Property and shall complete this work in accordance with the attached schedule of home improvements, drafted by Owners, attached hereto as Exhibit "C." In addition, the cost of these improvements shall be equal to or greater than the property tax savings received for the first ten years. The cost of these improvements may be distributed over two, five-year periods.

e. Owners shall maintain all buildings, structures, yards and other improvements in a manner that does not detract from the appearance of the immediate neighborhood. The following conditions are prohibited:

i) Dilapidated, deteriorating, or unrepaired structures, such as fences, roofs, doors, walls, and windows;

ii) Storage of scrap lumber, junk, trash or debris visible from adjacent properties and the public right-of-way;

iii) Outside storage of abandoned, discarded or unused objects or equipment visible from adjacent properties and the public right-of-way;

iv) Stagnant water or excavations, including pools or spas;

v) Any device, decoration, design, structure, or vegetation, which is unsightly by reason of its height, condition, or its inappropriate location.

f. Owners shall agree to periodic public access to Property for a limited tour or special event in coordination with Claremont Heritage or other community group. The first such event may occur within approximately five years from the date of this Agreement, and subsequent events may occur approximately once every five to eight years thereafter.

g. Owners shall not be held responsible for replacement of the historic structures if damaged or destroyed through "Acts of God" such as flood, tornado, lighting or earthquake.

h. Appeals under this Section shall be made to the Architectural and Preservation Commission pursuant to the City's standard appeal procedures set forth in the Claremont Municipal Code, Chapter 16.321.

4. FURNISHING OF INFORMATION AND ANNUAL COMPLIANCE REVIEW FEE: Owners shall furnish City any and all information requested by City, which may be necessary or advisable to determine compliance with the terms and provisions of this Agreement. This shall include an annual letter from Owners describing the home improvements completed during the previous year, along with other necessary documentation (i.e. pictures, receipts). In addition, Owners shall furnish City the required annual compliance review fee, which is calculated at 2.2 hours of staff time at the prevailing hourly rate approved by the City Council.

5. INSPECTIONS: Owners agree to permit examinations of the interior and exterior of the Property by representatives of the City, County Assessor, the State Department of Parks and Recreation, and the State Board of Equalization, to determine Owners' compliance with this Agreement. Such examinations shall be scheduled by appointment in advance, with a mandatory examination being performed every five years along with periodic examinations on an as-needed basis.

6. AUTOMATIC RENEWAL: On each anniversary date of this Agreement, one year shall be automatically added to the then-remaining term of this Agreement, unless notice of nonrenewal is given pursuant to the provisions of Paragraph 7 below.

7. NOTICE OF NONREWAL: If, in any year, either Owners or City desire not to renew the Agreement, that party shall serve written notice of nonrenewal on the other party in advance of the annual renewal date of the Agreement. Unless such notice is served by Owners at least 90 days, or by City at least 60 days, prior to the renewal date, one year shall automatically be added to the term of this Agreement. Upon receipt by Owners of the notice

of nonrenewal from City, Owners may make written protest to the City Council. At any time prior to the renewal date, City may withdraw its notice to Owners of nonrenewal.

8. EFFECT OF NOTICE NOT TO RENEW: If, in any year, either party serves notice of intent not to renew this Agreement, this Agreement shall remain in effect for the balance of the original ten-year term or, if applicable, until the date that is ten years after the effective date of the last renewal, whichever is later. Thereafter, this Agreement shall terminate.

9. CANCELLATION: City may cancel this Agreement if City determines that the Owners have breached any of the conditions or covenants of the Agreement or have allowed the Property to deteriorate to the point that it no longer meets the standards for a qualified historic property. City may also cancel this Agreement if it determines Owners have failed to timely restore or rehabilitate the Property in the manner specified in this Agreement.

10. NOTICE OF CANCELLATION: This Agreement may not be canceled pursuant to paragraph nine above until after City has given notice of, and has held, a public hearing as required by Governmental Code Section 50285.

11. CANCELLATION FEE: If City cancels this Agreement in accordance with paragraph nine above, Owners shall pay a cancellation fee of 12½% of the full value of the Property at the time of cancellation. The full value shall be determined by the County Assessor, without regard to any restrictions imposed on the Property pursuant to this Agreement. The cancellation fee shall be paid to the State Controller at such time and in such manner as the Controller shall prescribe and shall be deposited in the State General Fund.

12. NOTICES: All notices required by or provided for in this Agreement shall be given in writing and may be mailed or delivered in person. If mailed, notice by mail shall be deemed to have been given upon deposit of notice in the mail, postage prepaid, addressed as appropriate, to Owners at Owners' last known address on City's records, or to City at P.O. Box 880, Claremont, CA 91711, Attention: City Clerk.

13. NO COMPENSATION: Owners shall not receive any payment from City in consideration of the obligations imposed under this Agreement, it being recognized and agreed that the consideration for the execution of this Agreement is the substantial public benefit to be derived therefrom and the advantage that will accrue to Owners as a result of the effect upon the Property's assessed value on account of the restrictions required for the preservation of the Property.

14. EMINENT DOMAIN PROCEEDINGS: In the event that during the term of this Agreement, the Property is acquired in whole or in part by eminent domain or other acquisition by any entity authorized to exercise the power of eminent domain, and the acquisition is determined by the City Council to frustrate the purpose of this Agreement, the Agreement shall be canceled, and no fee shall be imposed pursuant to paragraph 11 hereof. In such event, this Agreement shall be deemed null and void for all purposes of determining the value of the Property so acquired.

If, subsequent to the filing of any action in eminent domain, the proposed condemnation is abandoned by the condemning agency as to all or a portion of the Property subject to the Agreement, the restriction on the use of the Property included in this Agreement shall without

further agreement of the parties, be reinstated and the terms of this Agreement shall be in force and effect.

15. REMEDIES AND ENFORCEMENT OF AGREEMENT: In lieu of, and/or addition to, any provisions to cancel this Agreement herein, City may specifically enforce, or enjoin the breach of, the terms of this Agreement. In the event that it is determined this Agreement does not constitute an enforceable restriction within the meaning of the applicable provisions of the California Government Code and the California Revenue and Taxation Code, except for unenforceability arising from the cancellation of nonrenewal of this Agreement, for any tax year during the term or any renewal of this Agreement, then this Agreement shall be null and void and without further effect and the Property subject to this Agreement shall from that time be free from any restriction whatsoever under this Agreement, without any payment or further act of the parties to the Agreement.

16. GENERAL PROVISIONS:

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

b. Owners agree to, and shall hold City and its elected officials, officers, agents, employees, representatives, and volunteers harmless from, liability for damage or claims for property damage which may arise from the direct or indirect use of operations of Owners and those of their contractors, subcontractors, agents, employees, and other persons acting on their behalf which relate to the use, operation and maintenance of the Property. Owners hereby agree(s) to and shall defend the operation and maintenance of the Property. Owners hereby agree(s) to and shall defend City and its elected officials, officers, agents, employees, representatives, and volunteers with respect to any and all actions for damages suffered, or alleged to have been suffered, by reason of the operations referred to in this Agreement regardless of whether or not City prepared, supplied, or approved the plans, specifications or other documents for the Property.

17. NOTICE OF RECORDATION OF AGREEMENT: No later than 20 calendar days after the parties execute and enter into the Agreement, City shall cause this Agreement to be recorded in the office of the County Recorder of Los Angeles and shall submit a certified copy of this Agreement to the County Assessor's Office. Owners or their agent shall provide written notice of the Agreement to the State Office of Historic Preservation within six months of entering into the Agreement.

18. SUCCESSORS AND ASSIGNS: This Agreement is binding upon Owners' successors and assigns in interest or title to the Property. A successor in interest or title shall have the same rights and obligations under the Agreement as Owners. Each and every contract, deed or other instrument hereinafter executed, covering or conveying the Property, or any portion thereof, shall conclusively be held to have been executed, delivered and accepted subject to the covenants, reservations and restrictions expressed in this Agreement regardless of whether such covenants, reservations and restrictions are set forth in such contract, deed or other instrument.

19. NONWAIVER: No acts or admissions by City, or any agent(s) of City shall constitute a waiver of any or all of City's right under this Agreement.

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

21. ATTORNEY'S FEES: In the event legal proceedings are brought by any party or parties hereto, for breach of this Agreement, or to compel conformance under this Agreement, or to determine the rights and duties of any party hereunder, the prevailing party in such proceeding shall be entitled to an award of reasonable attorneys' fees and costs in addition to all other relief to which it may be entitled.

IN WITNESS WHEREOF, the parties have executed this Agreement on the date shown below, but this Agreement is effective as of the date and year first above written.

Property Owner:

DATE:_____ _____
Alan C. Miller
Property Owner

Property Owner:

DATE:_____ _____
Kristin J. Miller
Property Owner

DATE:_____ THE CITY OF CLAREMONT

By_____
Adam Pirrie
City Manager

EXHIBIT A

LEGAL DESCRIPTION OF THE PROPERTY

The Property is located at 1399 Via Zurita Street in the City of Claremont, County of Los Angeles, State of California, and is more particularly described as follows:

PARCEL 1:

THE EASTERLY 21 FEET MEASURED AT RIGHT ANGLES WITH THE EAST LINE OF LOT 6 AND ALL OF LOT 18 OF TRACT 13581, AS PER MAP RECORDED IN BOOK 331, PAGES 22 AND 23 OF MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY.

PARCEL 2:

THAT PORTION OF THE SOUTHEAST QUARTER OF SECTION 4, TOWNSHIP 1 SOUTH, RANGE 8 WEST, SAN BERNARDINO MERIDIAN, DESCRIBED AS FOLLOWS:

BEGINNING AT A POINT IN THE EASTERLY LINE OF INDIAN HILL BOULEVARD, 80 FEET WIDE, THAT IS DISTANT NORTH 0º13’40” WEST 710 FEET FROM THE INTERSECTION OF SAID EASTERLY LINE WITH THE NORTH LINE OF MESA AVENUE, 60 FEET WIDE, THENCE EAST 95 FEET TO THE TRUE POINT OF BEGINNING; THENCE FROM SAID TRUE POINT OF BEGINNING, EAST 64.89 FEET; THENCE SOUTH 20 FEET; THENCE SOUTH 45º EAST 49.50 FEET; THENCE SOUTH 31.13 FEET TO THE BEGINNING OF A TANGENT CURVE CONCAVE EASTERLY HAVING A RADIUS OF 670 FEET; THENCE SOUTHERLY ALONG SAID CURVE 8.87 FEET; THENCE WEST 99.58 FEET; THENCE NORTH 0º13’40” WEST 95 FEET TO THE TRUE POINT OF BEGINNING.

APN: 8306-010-031 and 8306-010-045

EXHIBIT B

CHARACTER-DEFINING ELEMENTS OF PROPERTY – 1399 Via Zurita Street

Significant Exterior Features

- Low pitched cross gabled and shed roofs
- Zero overhangs with wrap around tiles
- Front porch enclosed by low stucco walls
- Recessed casement windows
- Red clay tile roofing

Significant Interior Features

- Textured stucco walls
- Exposed ceiling joists

EXHIBIT C

SCHEDULE OF IMPROVEMENTS – 1399 Via Zurita Street

DESCRIPTION OF IMPROVEMENTS

Remove Wood Trellis Cover - Remove wood steps outside of den	$1,850
Replace Windows along Breezeway - Includes removal of existing windows, reframing, installing foam lintels and finishing stucco to match	$21,821
Replace Windows and Sliding Door in Den - Removal and installation of new windows and door, install lintels, restucco	$12,592
Replace Windows and Sliding Door in Living Room - Remove existing windows and install new windows and door, install lintels, restucco	$18,112
Replace Windows in All Other Rooms - Includes guest room, guest bath, kitchen, laundry, primary bedroom, bathroom 1 & 2, and Bedrooms 2 & 3 (total 15)	$22,626
Construction Services - Portable toilet and service, dump fees, house cleaning (including windows)	$2,450

Note: All work must conform to standards of the Office of Historic Preservation of the Department of Parks and Recreation, United States Secretary of the Interior's Guidelines for Rehabilitation of Historic Properties, and the State Historical Building Code. All work subject to City of Claremont design review as required by the Claremont Municipal Code.

RESOLUTION NO. 2026-09

A RESOLUTION OF THE ARCHITECTURAL AND PRESERVATION COMMISSION OF THE CITY OF CLAREMONT, CALIFORNIA, RECOMMENDING CITY COUNCIL APPROVAL OF HISTORICAL PROPERTY (MILLS ACT) AGREEMENT #26-MA04 BETWEEN THE CITY AND THE OWNER OF THE PROPERTY LOCATED AT 1399 VIA ZURITA STREET – APPLICANT AND PROPERTY OWNER(S): ALAN C. MILLER AND KRISTIN J. MILLER

WHEREAS, on May 7, 2026, the owners of 1399 Via Zurita filed a request for approval of a Historical Property Agreement; and

WHEREAS, the historic property at 1399 Via Zurita Street meets the established criteria for participating in the Mills Act program and the Historical Property Agreement will result in the preservation of the character defining features of the property; and

WHEREAS, notice of the proposed agreement and the Architectural and Preservation Commission meeting at which this matter was considered was duly given and published; and

WHEREAS, the Architectural and Preservation Commission considered the request at its meeting on September 9, 2026, at which time all persons wishing to testify in connection with said agreement were heard, and the agreement was fully studied;

NOW, THEREFORE, THE ARCHITECTURAL AND PRESERVATION COMMISSION DOES HEREBY RESOLVE:

SECTION 1. The Architectural and Preservation Commission has determined that the proposed scheduled improvements within the contract are categorically exempt from the California Environmental Quality Act (CEQA) pursuant to Section 15331 in that these improvements are for the restoration and rehabilitation of a historical resource, will be conducted in a manner consistent with the Secretary of the Interior's Standards of the Office of Historic Preservation of the Department of Parks and Recreation, United States Secretary of the Interior's Guidelines for Rehabilitation of Historic Properties, and the State Historical Building Code and will be subject to applicable City permitting requirements. Therefore, no further environmental review is necessary;

SECTION 2. The Architectural and Preservation Commission of the City of Claremont recommends to the City Council approval of Historical Property Agreement #26-MA04.

SECTION 3. The Architectural and Preservation Commission Chair shall sign this Resolution and the Commission's secretary shall attest to the adoption thereof.

PASSED, APPROVED, AND ADOPTED this 9th day of September, 2026.

Architectural and Preservation Commission Chair

ATTEST:

Anne Bennett

Architectural and Preservation Commission Secretary

STATE OF CALIFORNIA)
COUNTY OF LOS ANGELES)ss.
CITY OF CLAREMONT)

I, Anne Bennett, Administrative Assistant of the City of Claremont, County of Los Angeles, State of California, hereby certify that the foregoing Resolution No. 2026-09 was adopted by the Architectural and Preservation Commission of said City of Claremont at a regular meeting of said Commission held on September 9, 2026, by the following vote:

AYES:	Commissioners:	Deal, Castillo, Emmert, Neiuber, Spivack
NOES:	Commissioners:	None
ABSTENSIONS:	Commissioners:	None
ABSENT:	Commissioners:	Tucker, Perry

Anne Bennett

Administrative Assistant
City of Claremont

Calculation of Estimated Reduced Property Taxes for Properties Subject to Historical Property Contracts

Address: 1399 Via Zurita
Current Property Owners: Alan and Kristin Miller

Upon approval of a historical property contract, the county assessor determines the reasonable expected yield by analyzing rental income of similar properties in the area or, if available, what the property would yeild under prudent management. Reasonable expected yield for income-producing property is based on rents actually received and typical rents received for similar property in similar use, less maintenace and operating expanses.

The Mills Act capitalization rate is calculated by adding four component percentages including:

- An interest rate based on the Federal Home Loan Bank rate on conventional mortgages (6.66% for September 2026)
- The historical property risk (4% for owner-occupied single-family dwellings)
- A percentage equal to the reciprocal of the remaining life of the structure. The typical remaining life for a wood frame building is 20 years (1/20 = 5%) and for masonry building is 50 years (1/50 = 2%); however, typical remaining life for most buildings is 50 years (1/50 = 2%) if adequate care is applied.
- The percentage of the tax rate times the assessment ratio (typically 1%).

The Capitalization Rate is used to calculate the estimated annual savings to the homeowner and estimated annual cost to the City, as noted in the table below:

Existing Property Value Calculations

$917,548	County Assessed Value
$9,175	Property tax (1% of value)
$1,064	Claremont's share of property tax (11.6% of property tax)

Estimated Rental Calculations

$3,500	Estimated monthly rent
$42,000	Annual rent
$2,000	Annual rent expenses (M&O costs)
$40,000	Annual rent less expenses

Capitalization Rate

6.66%	Federal home loan interest rate (State Board of Equalization 2025)
4.00%	Historical property tax
2.00%	Amortization - 50 year life
1.00%	Tax rate
13.66%	Capitalization rate

New Property Value Calculation Under Mills Act Contract

	$292,826	New estimated property value (Annual rent less expenses/capitalization rate)
-	$7,000	Homeowner's Exemption
	$285,826	Taxable Value
	$2,858	New estimated property tax (1% of new taxable value)
	$6,317	**Owner's annual savings**
	$63,172.22	**Owner's savings for first 10 years**
	$332	Claremont's share of reduced property tax (11.6% of new property tax)
	$733	**Estimated annual loss to Claremont**

Notes
This Calculation does not include any special assessment district fees included in annual tax
This Calculation is an estimate, and is for a reference purpose only

RESOLUTION NO. 2012-75

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT AMENDING THE CITY'S PROCEDURES AND CRITERIA FOR APPROVAL OF HISTORICAL PROPERTY (MILLS ACT) CONTRACTS.

WHEREAS, the City of Claremont ("City") has established a policy of historic preservation by addressing historic preservation as part of the City's General Plan; and

WHEREAS, as set forth in the Land Use, Community Character, and Heritage Preservation, the City recognizes the importance of conserving and safeguarding the City's cultural, architectural, and historical resources that contribute to the special and unique character of the City, and create a recognizable identity for the community; and

WHEREAS, the Historic Preservation Element sets forth the following goal and policies:

Goal 2-14	Retain and celebrate Claremont's rich history and heritage, as evidenced through its development patterns, buildings and building materials, landscaping, street treatments, parks and open space, and civic architecture.
Policy 1-14.1	Continue to protect architectural, historical, open space, environmental, and archaeological resources throughout the City.
Policy 1-14.3	Continue to encourage pride in the quality and character of historic areas.
Policy 1-14.5	Continue to support the retention and/or adoptive reuse of existing residential, commercial, and industrial buildings where possible, particularly structures listed on the Register of Structures of Historical and Architectural Merit of the City of Claremont.
Policy 1-14.6	Strive to prevent the demolition of structures listed on the Register of Historical and Architectural Merit of the City.
Policy 1-14.8	Continue to offer historic preservation tools such as the Mills Act.
Policy 1-14.9	Explore and evaluate different approaches to protect and enhance historic resources throughout the community; and

WHEREAS, the State of California enacted the Mills Act (California Government Code Section 50820, et seq.) to allow cities to enter into contracts with owners of "qualified historical property" to preserve historical properties by reducing property taxes; and

WHEREAS, Mills Act contracts provide a benefit to the City in helping to ensure that important community resources are preserved and/or restored, and to help carryout the goals and policies of the City's General Plan; and

WHEREAS, in October, 2000, the City Council adopted Resolution 2000-157 that established a procedure and qualifying criteria for historical property contracts, which included a criteria that limited the number of properties that qualified for historical property contracts; and

WHEREAS, in January 2009, the City Council adopted Resolution 2009-04, which expanded the criteria for historic property contracts in order to encourage additional Mills Act contracts that will help to advance the City's historic preservation goals and policies, and to restrict the number of Mills Act contracts to no more than six per calendar year in order to limit the fiscal impact the Mills Act contracts will have on the City; and

WHEREAS, the City Council retains the final authority to approve, deny, or modify any Mills Act contract recommended by the Architectural Commission; and

WHEREAS, on February 29 and September 12, 2012, the Architectural Commission reviewed and analyzed the current procedures and criteria for the Mills Act Program, and adopted Resolution 2012-12 recommending approval to the City Council to amend the existing program to incorporate an annual review fee to recover the cost of staff time associated with annual reviews for contract compliance, which is calculated at 2.2 staff hours at the prevailing hourly rate approved by the City Council (current rate is $98.50 making the annual review fee $217), and to modify Criteria D to state that the proposed improvements be related to the preservation and/or the rehabilitation of character defining elements and/or historical and structural integrity of the property. Additionally, the cost of such improvements must be equal to or greater than the expected property tax savings for the first ten years, which needs to be equally distributed into two five-year periods; and

WHEREAS, on October 9, 2012, the City Council fully reviewed the subject matter at its regular meeting.

NOW, THEREFORE, THE CLAREMONT CITY COUNCIL DOES HEREBY RESOLVE:

SECTION 1. The City Council has determined that amendment of procedures for approval of Mills Act contracts is not a project defined by Section 15378 of the California Environmental Quality Act (CEQA) guidelines. Therefore, no further environmental review is necessary.

SECTION 2. The procedure and qualifying criteria for approval of historical property contracts are amended to read as follows:

PROCEDURES FOR REVIEW AND APPROVAL OF HISTORICAL PROPERTY (MILLS ACT) CONTRACTS

110 PURPOSE OF MILLS ACT

In 1976, legislation was adopted in California that created an alternative method for determining assessed value of certain qualified historical properties. Commonly referred to as the Mills Act, the law provides an income-based tax formula for eligible properties subject to historical property contracts (Article 12, commencing with Section 50280, of Chapter 1, Part 1 Division 1, Title 5, of the California Government Code).

The use of the Mills Act gives communities the flexibility to deal with historical structures on a case-by-case basis. Local government has the option to choose which properties are suitable for the incentive by evaluating various factors. These contracts can be used both as a tool to rehabilitate and preserve an individual building, and as part of a broader community-wide program.

As a preservation incentive, historical property contracts offer advantages to both local government and property owners. The contracts provide property tax relief for owners of qualified historical properties who agree to abide by reasonable preservation requirements. For local government, the preservation requirements ensure an authentic rehabilitation and a high level of maintenance of a cultural resource that is important to the community.

120 APPLICATION FILING

Any residential property owner may file an application with the required submittal deposit of $1,000 for a historical property contract with the Department of Community Development. The application shall be made on forms provided by the department and submitted to the department together with the application fee deposit, and such documentation, information, and photographs required by the department for a complete understanding of the qualities and characteristics of the property for which the historical property contract is requested, and a description of, and timeframe for, proposed improvements to the property. City costs in processing applications shall be charged against application fee deposits.

Prior to determining the completeness of an application, the Director shall provide a copy of the application and submitted materials to Claremont Heritage for review and comment. Prior to submittal of an application, the property owner is encouraged to discuss with City staff whether their property meets the criteria for historical property contracts.

130 CRITERIA FOR AN HISTORICAL PROPERTY CONTRACT

An historical property contract may be approved only if all the following criteria are met:

A. The subject property meets the eligibility requirements for a Mills Act contract pursuant to California Government Code Section 50280.1 in that it is a privately owned property which is not exempt from property taxation, and is listed on the National Register of Historic Places, located in a National Register or local historic district, or listed in a state or county official register of historic or architecturally significant sites, places or landmarks, or in the Register of Structures of Historic and Architectural Merit of the City of Claremont;

B. The subject property contributes significantly to the quality, diversity, historical interest, and ambience of the community;

C. Significant features that define the historical character of the subject property, and its buildings have not been destroyed or can be restored based on documentary, physical, or pictorial evidence;

D. The owner of the subject property proposes to make improvements that are related to preservation and/or rehabilitation of character defining elements and/or historical and structural integrity of the property. Additionally, the cost of such improvements must be equal to or greater than the expected property tax savings for the first ten years, which needs to be distributed into two five-year periods; and

E. The subject property is residential.

140 PREPARATION OF HISTORICAL PROPERTY CONTRACT

Upon receipt of a complete application for a property meeting the above criteria, the Director of Community Development or his/her designee shall assist the property owner in preparing a draft historical property contract and agreement conditions, and an example of tax savings. The city attorney shall review the proposed contract to ensure it conforms to statutory guidelines.

As part of the contract, the owner of the property shall agree to periodic examinations, by appointment, of the interior and exterior of the property by representatives of the City, County Assessor, the State Department of Parks and Recreation, and the State Board of Equalization, to determine the owner's compliance with the contract. The owner shall also agree to conform to the rules and regulations of the Office of Historic Preservation of the Department of Parks and Recreation, United States Secretary of the Interior's Standards for Rehabilitation of Historic Properties, and the State Historical Building Code.

150 HEARING REQUIREMENTS

After the City Attorney has completed a review of a draft historical property contract, the matter shall be referred to the Architectural Commission at their next available meeting. Notice of the hearing by the Architectural Commission shall be given not less than ten days prior to any action taken on the application by publishing a notice in a local newspaper. Such notice shall include the date, time, and place of the hearing and general explanation of the matter to be considered. Notice of the hearing shall also be sent to the record owner(s) and to other persons who have requested to be notified of such matters, or whom staff determines may have an interest in the matter.

160 COMMISSION RECOMMENDATION AND COUNCIL DECISION

The Architectural Commission shall, by resolution, make a recommendation related to the application, and the resolution shall be forwarded to the City Council. The City

Council shall consider the recommendation of the Architectural Commission and make a decision on the proposed historical property contract. The City Council shall have complete and final authority to approve, deny, or modify any historical property contract recommended by the Architectural Commission.

170 EXECUTION OF CONTRACT

The City Manager shall have the authority on behalf of the City to execute historical property contracts approved by the City Council.

180 CONTRACT RECORDATION

Upon approval and execution of a historical property contract, the City Clerk shall submit a certified copy of the agreement for recording to the County Recorder of Los Angeles, and the County Assessor's Office. Written notice of the agreement shall also be provided to the State Office of Historic Preservation.

190 PERIODIC REVIEW OF CONTRACT

The Director of Community Development shall periodically review the historical property contract and inspect the property to determine the property owner's compliance with the contract. The owner of the property shall, on an annual basis, provide the Director with a letter describing the home improvements completed during the preceding year, along with the annual review fee (calculated at 2.2 staff time at the prevailing hourly rate approved by the City Council).

200 MAXIMUM NUMBER OF CONTRACTS PER YEAR

The City Council shall approve no more than six historical property contracts during any one calendar year period.

SECTION 3. If applicable, the applicant shall be notified when the City costs in processing the application exceed $1,000 and advised of the estimated costs to continue/finish processing the application. If applicable, the applicant shall be notified again when the City costs in processing the application exceed $1,500 and advised of the estimated costs to continue/finish processing the application.

SECTION 4. Resolution Nos. 2000-157 and 2009-04 are hereby repealed in their entirety and superseded by the provisions set forth in this Resolution.

SECTION 5. The Mayor shall sign this Resolution and the City Clerk shall attest and certify to the passage and adoption thereof.

SECTION 6. This Resolution shall take effect immediately, provided that the fee for the annual review of the historical property contract shall not take effect until 60 days after the adoption of this Resolution.

PASSED, APPROVED, AND ADOPTED this 9th day of October, 2012.

Mayor, City of Claremont

ATTEST:

City Clerk, City of Claremont

APPROVED AS TO FORM:

City Attorney, City of Claremont

STATE OF CALIFORNIA)
COUNTY OF LOS ANGELES)ss.
CITY OF CLAREMONT)

I, Lynne E. Fryman, City Clerk of the City of Claremont, County of Los Angeles, State of California, hereby certify that the foregoing Resolution No. 2012-75 was regularly adopted by the City Council of said City of Claremont at a regular meeting of said Council held on the 9th day of October, 2012, by the following vote:

AYES:	COUNCILMEMBERS:	NASIALI, PEDROZA, CALAYCAY, LYONS, SCHROEDER
NOES:	COUNCILMEMBERS:	NONE
ABSTENSIONS:	COUNCILMEMBERS:	NONE
ABSENT:	COUNCILMEMBERS:	NONE

Lynne E. Fryman
City Clerk of the City of Claremont

Photo Survey – 1399 Via Zurita

























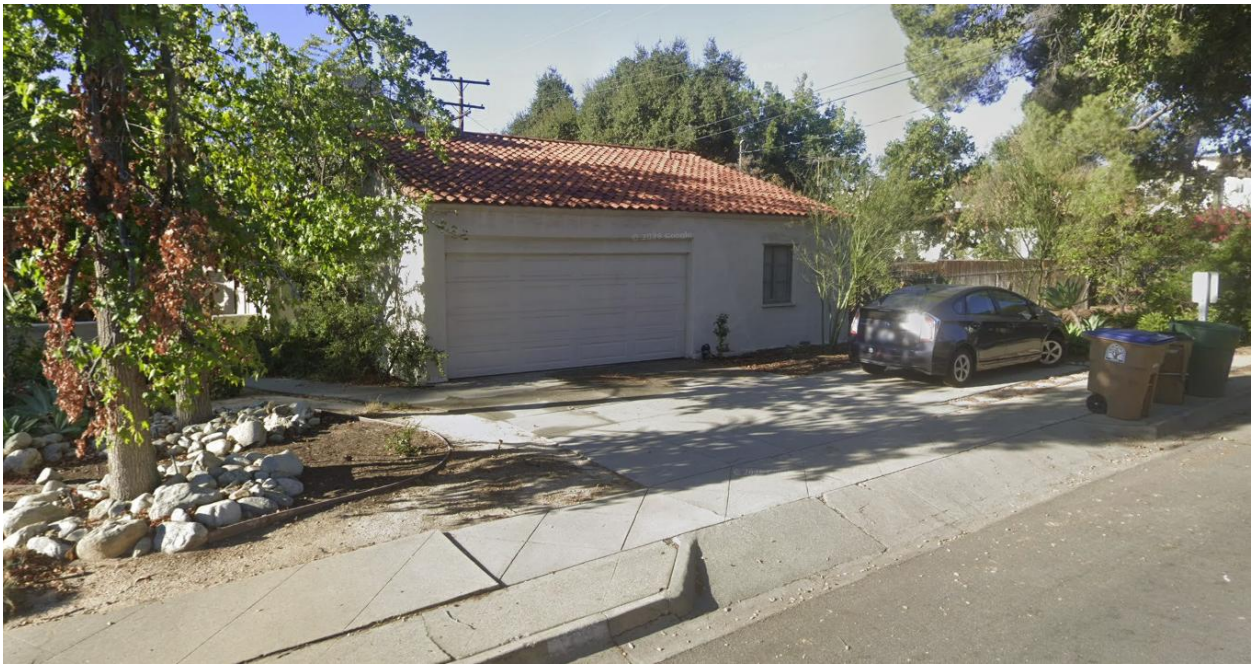












DM RENOVATION CONSTRUCTION INC.

Lic #974967

P.O Box 9
Claremont, CA 91711

ESTIMATE

April 10, 2026

TO;
Kristen & Alan Miller
1399 Via Zurita
Claremont, CA 91711

Darren Molles 951-453-9697

QTY	DESCRIPTION	UNIT PRICE	LINE TOTAL
	Remove and haul away wood shade structure over front entry (rafters, post & beams)		
	Remove and haul away wood steps outside of den		
			$1,850.00
	Breezeway		
	Demo all stucco and plaster/drywall around breezeway		
	Remove existing windows		
	Remove existing framing and reframe window openings as needed to accommodate new window sizes		
	Fur out exterior walls as needed to conceal existing post and beam		
	Install (4) new windows per manufactures recommendations using approved flashing		
	Lath, scratch, brown around windows		
	Install rigid foam lintel over brown coat above window to match detail on other windows		
	Finish stucco to match existing		
	Insulate accessible exterior walls using R-15 batt insulation		
	Hang new drywall as needed		
	Tape, mud & finish drywall to match existing finish		
	Cost of windows is not included		
	estimate		$18,975.00
	Overhead & profit		$2,846.00
	Total		$21,821.00
	Den		
	Demo all stucco and plaster/drywall around sliding glass door as needed		
	Remove existing sliding glass door		
	Remove existing framing and reframe opening as needed to accommodate new windows		
	Install new windows per manufactures recommendations using approved flashing		
	Lath, scratch, brown around windows		
	Install rigid foam lintel over brown coat above window to match detail on other windows		
	Finish stucco to match existing		
	Insulate accessible exterior walls using R-15 batt insulation		
	Hang new drywall as needed		
	Tape, mud & finish drywall to match existing finish		
	Cost of windows is not included		
	Estimate		$10,950.00
	Overhead & profit		$1,642.00
	Total		$12,592.00

	Living room		
	Demo all stucco and plaster/drywall around sliding glass door and two windows on South wall and three windows on North wall as needed		
	Remove existing sliding glass door and two windows on south wall and three windows on north wall		
	Install a custom fabricated sheet metal pan in door opening		
	Install (1) new set of French doors and (5) new windows per manufactures recommendations using approved flashing		
	Lath, scratch, brown around door and windows		
	Install rigid foam lintel over brown coat above door and windows to match detail on other windows		
	Finish stucco to match existing (scrape, prep, apply bonder and stucco wall from corner of den to outside corner of living room		
	Insulate accessible exterior walls using R-15 batt insulation		
	Hang new drywall as needed		
	Tape, mud & finish drywall to match existing finish		
	Cost of windows is not included		
	Estimate		$15,750.00
	Overhead & profit		$2,362.00
	Total		$18,112.00
	Guest room, guest bath, kitchen, laundry, primary bed, bath 1 & 2, bed 2 & 3 (15)		
	Demo all stucco and plaster/drywall around existing windows as needed		
	Remove existing windows		
	Install new windows per manufactures recommendations using approved flashing		
	Lath, scratch, brown around windows		
	Install rigid foam lintel over brown coat above windows to match detail on other windows		
	Finish stucco to match existing		
	Patch drywall/plaster around windows to match existing		
	Cost of windows is not included		
	estimate		$19,675.00
	Overhead & profit		$2,951.00
	Total		$22,626.00
	Construction services		
	Portable toilet and service		
	Dump fees		
	Professional house cleaning including windows		
			$2,450.00
	Exclusions		
	Any unforeseen or unexpected obstacles/damage discovered during the construction process will be discussed and if additional charges are required it would be agreed to per change order prior to work being completed.		
	Cost of architect, engineer & permits not included in this estimate		
	Interior/exterior priming & painting		
	Damage to existing planters, grass/yard, irrigation, repairs not included in this estimate		

Quote Creation Date: 4/22/2026
Quote Expiration Date: 6/21/2026
Quote Order Date: Quote Not Ordered

western window systems
westernwindowsystems.com

CUSTOMER QUOTE 857486



Presented by

Casa Blanc, LLC - LA

Unassigned

Quote Name: Kristin Miller

PO Number: Enter Customer PO

Bid by:

Estimated Ship Date: Quote Not Ordered

Ship Via: CA - Arranged by Western Window Systems

Billing Information

Customer Name:

Address:

Phone:

Fax:

Contact Person:

Contact Email: tony@casablancllc.com; brent@casablancllc.com; jorge@casablancllc.com

Shipping Information

Address:

Phone:

Fax:

Contact Person:

Project Information 857486

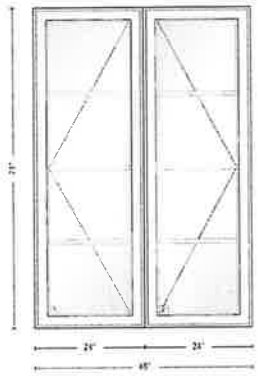
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Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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westernwindowsystems.com

Line Item	Quantity	Net Price	Extended Price
1-1	9	$3,722.57	$33,503.13

Outside View (Scaled to Fit)



Line Item Description

Room ID: Living/Breezeway W-01

PRODUCT TYPE
Series 670 Casement Left / Right 48 x 71
Frame Width = 24, Frame Height = 71
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1, 2: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Annealed
Unit 1, 1: Annealed Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W4H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Shipped Loose, Drip Cap Cut Length = 48
Jamb Width = 4.5"
Wrapping - Mull Options
Mull Method = Verticals Run Thru

Special Order Notes:

Warnings: Stacked units (mulled above or below) will ship combined when jambs run through; Horizontally mulled units (mulled side by side) will ship separately when verticals run through.
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS

Line Notes:

Weight (lbs): **1247.719**

Project Information 857486

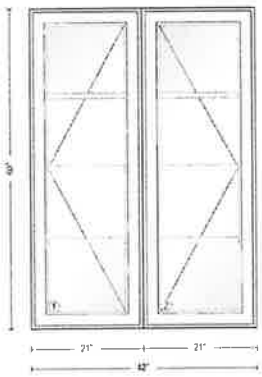
Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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Line Item	Quantity	Net Price	Extended Price
2-1	6	$3,199.17	$19,195.02

Outside View (Scaled to Fit)



Line Item Description

Room ID: Den Primary Bedroom W-02

PRODUCT TYPE
Series 670 Casement Left / Right 42 x 60
Frame Width = 21, Frame Height = 60
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1, 2: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Annealed
Unit 1, 1: Annealed Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W4H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Shipped Loose, Drip Cap Cut Length = 48
Jamb Width = 4.5"
Wrapping - Mull Options
Mull Method = Verticals Run Thru

Special Order Notes:

Warnings: Stacked units (mulled above or below) will ship combined when jambs run through; Horizontally mulled units (mulled side by side) will ship separately when verticals run through.
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS

Line Notes:

Weight (lbs): **652.2828**

Project Information 857486

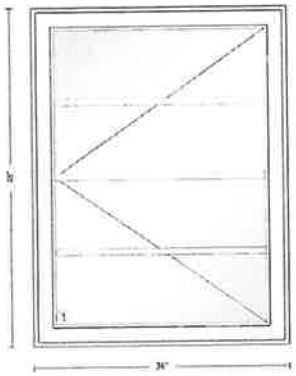
Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

western window systems
westernwindowsystems.com

Line Item	Quantity	Net Price	Extended Price
3-1	3	$1,764.69	$5,294.07

Outside View (Scaled to Fit)



Line Item Description

Room ID: Bedroom 3/Guest Room W-03

PRODUCT TYPE
Series 670 Casement Left 36 x 48
Frame Width = 36, Frame Height = 48
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Annealed
Unit 1: Annealed Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W4H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Applied
Jamb Width = 4.5"

Special Order Notes:
Warnings:
Line Notes:
Weight (lbs): **202.2576**

Project Information 857486

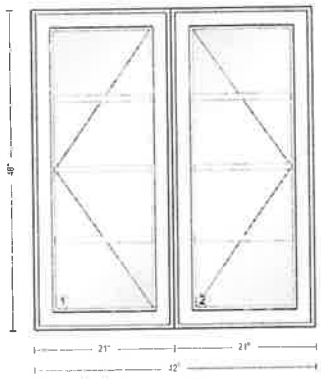
Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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westernwindowsystems.com

Line Item	Quantity	Net Price	Extended Price
4-1	3	$2,923.58	$8,770.74

Outside View (Scaled to Fit)



Line Item Description

Room ID: Bedroom 2 & 3 W-04

PRODUCT TYPE
Series 670 Casement Left / Right 42 x 48
Frame Width = 21, Frame Height = 48
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1, 2: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Annealed
Unit 1, 1: Annealed Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W4H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Shipped Loose, Drip Cap Cut Length = 48
Jamb Width = 4.5"
Wrapping - Mull Options
Mull Method = Verticals Run Thru

Special Order Notes:

Warnings: Stacked units (mulled above or below) will ship combined when jambs run through; Horizontally mulled units (mulled side by side) will ship separately when verticals run through.
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS

Line Notes:

Weight (lbs): **273.9587**

Project Information 857486

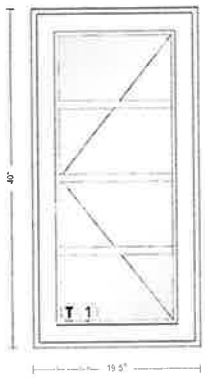
Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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Line Item	Quantity	Net Price	Extended Price
5-1	2	$1,388.14	$2,776.28

Outside View (Scaled to Fit)



Line Item Description

Room ID: Bathroom 1 & 2 W-05

PRODUCT TYPE
Series 670 Casement Left 19.5 x 40
Frame Width = 19.5, Frame Height = 40
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Tempered
Unit 1: Tempered Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W4H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Applied
Jamb Width = 4.5"

Special Order Notes:
Warnings: THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
Line Notes:
Weight (lbs): **73.45246**

Project Information 857486

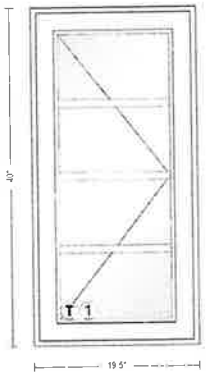
Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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Line Item	Quantity	Net Price	Extended Price
6-1	2	$1,390.16	$2,780.32

Outside View (Scaled to Fit)



Line Item Description

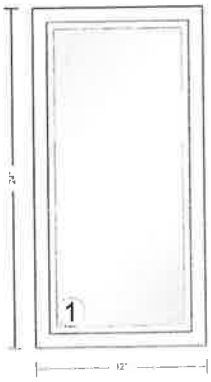
Room ID: Bathroom 1 & 2 W-06

PRODUCT TYPE
Series 670 Casement Right 19.5 x 40
Frame Width = 19.5, Frame Height = 40
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Tempered
Unit 1: Tempered Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W4H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Applied
Jamb Width = 4.5"

Special Order Notes:
Warnings: THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
Line Notes:
Weight (lbs): **75.06246**

Line Item	Quantity	Net Price	Extended Price
7-1	1	$421.47	$421.47

Outside View (Scaled to Fit)



Line Item Description

Room ID: Closet 1 W-07

PRODUCT TYPE
Series 600 Direct Set 12 x 24
Frame Width = 12, Frame Height = 24
Complete Unit, Thermally Broken, Default Sill, Standard Stops, Sill Pan? = No, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Annealed
Unit 1: Annealed Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package
NFRC
U-Factor = 0.34, U-Factor-Metric = 1.93, SHGC = 0.24, CR = 44, VT = 0.56, AL = 0.3, AL-Metric = 1.52, CPD = WIG-A-16-00557-00001
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Applied
Jamb Width = 4.5"

Project Information 857486

Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

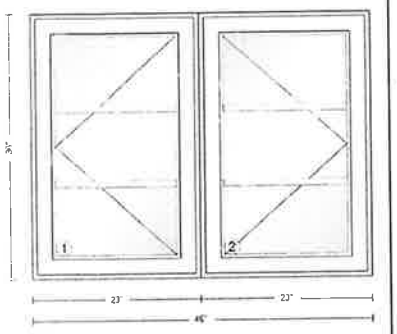
Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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Special Order Notes:
Warnings:
Line Notes:
Weight (lbs): **11.15133**

Line Item	Quantity	Net Price	Extended Price
8-1	1	$2,602.87	$2,602.87

Outside View (Scaled to Fit)



Line Item Description

Room ID: Kitchen W-08

PRODUCT TYPE
Series 670 Casement Left / Right 46 x 36
Frame Width = 23, Frame Height = 36
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1, 2: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Annealed
Unit 1, 1: Annealed Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W3H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Shipped Loose, Drip Cap Cut Length = 48
Jamb Width = 4.5"
Wrapping - Mull Options
Mull Method = Verticals Run Thru

Special Order Notes:
Warnings: Stacked units (mulled above or below) will ship combined when jambs run through; Horizontally mulled units (mulled side by side) will ship separately when verticals run through.
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
Line Notes:
Weight (lbs): **75.551**

Project Information 857486

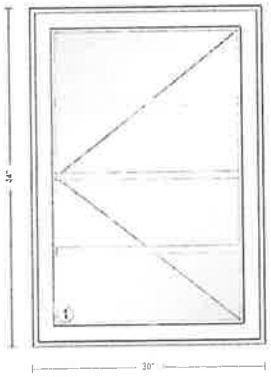
Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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Line Item	Quantity	Net Price	Extended Price
9-1	1	$1,604.72	$1,604.72

Outside View (Scaled to Fit)



Line Item Description

Room ID: Laundry W-09

PRODUCT TYPE
Series 670 Casement Left 30 x 44
Frame Width = 30, Frame Height = 44
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Annealed
Unit 1: Annealed Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W4H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Applied
Jamb Width = 4.5"

Special Order Notes:
Warnings:
Line Notes:
Weight (lbs): **54.73933**

Project Information 857486

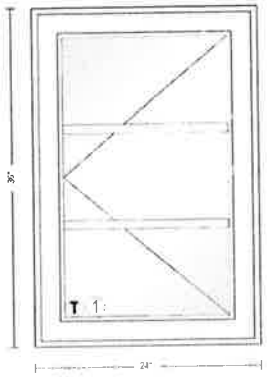
Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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Line Item	Quantity	Net Price	Extended Price
10-1	1	$1,410.56	$1,410.56

Outside View (Scaled to Fit)



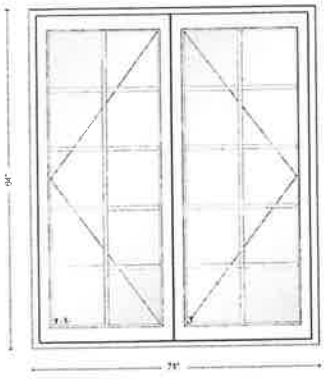
Line Item Description **Room ID:** Guest Bath W-10

PRODUCT TYPE
Series 670 Casement Left 24 x 36
Frame Width = 24, Frame Height = 36
Complete Unit, Thermally Broken, Sill Type = 670 Casement Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Tempered
Unit 1: Tempered Glass, 3/4" OA (3mm/.50"/3mm)
HARDWARE OPTIONS
Coastal Stainless Package, Roto Operator, Folding Handle, Black Hardware
SCREEN INFORMATION
Screen(s), Black Fiberglass Mesh, Screens Bundled Separately
GRILLES
Simulated Divided Lite .87", Colonial, 1W3H
NFRC
U-Factor = 0.51, U-Factor-Metric = 2.9, SHGC = 0.18, CR = 39, VT = 0.37, AL = 0.28, AL-Metric = 1.42, CPD = WIG-A-30-00852-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Applied
Jamb Width = 4.5"

Special Order Notes:
Warnings: THIS WINDOW WILL NOT MEET EGRESS REQUIREMENTS
Line Notes:
Weight (lbs): **38.74086**

Line Item	Quantity	Net Price	Extended Price
11-1	1	$9,126.28	$9,126.28

Outside View (Scaled to Fit)



Line Item Description **Room ID:** Living Room D-01

PRODUCT TYPE
Series 900 Double Swinging Door Inactive/Active 71 x 84
Frame Width = 71, Frame Height = 84
Complete Unit, Swing Out Direction, Narrow Stile, Thermally Broken, Standard Bottom Rail, Standard Sill, Shipped, and not crated by Western Window Systems, CAD Drawing Required? = No
COLOR OPTIONS
Bronze Anodized
GLASS OPTIONS
Unit 1: Glass Provider = Cardinal, Insulated Low E, Cardinal 366, Cardinal i89? = No, Argon Gas, with NEAT = No, Stainless Steel Spacer, Black Spacer Color, NFRC Unit Glass Strength = Tempered
Unit 1, 2: Tempered Glass, 1" OA (5mm/.62"/5mm)
HARDWARE OPTIONS
Coastal Stainless Package, Hardware Option = Multi-Point w/ Premium Dallas, Black Hardware, Keyed, Standard Deadbolt Location, Standard Continuous Hinge, Include Panic Hardware? = No
GRILLES
Simulated Divided Lite .87", Colonial, 2W5H
NFRC
U-Factor = 0.54, U-Factor-Metric = 3.07, SHGC = 0.18, CR = 31, VT = 0.35, AL = 0.3, AL-Metric = 1.52, CPD = WIG-A-21-00650-00002
Condition Images
Vertical View = NA, Horizontal View = NA
Wrapping - Perimeter Options
Perimeter Frame = Nailing Fin, Drip Cap = Yes, Drip Cap Application Method = Applied
Jamb Width = 4.5"

Project Information 857486

Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems



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Special Order Notes:

Warnings: The glass thickness you have selected is unable to accommodate grilles.
The glass thickness you have selected is unable to accommodate grilles.

Line Notes:

Weight (lbs): **278.5153**

Project Information 857486

Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems



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NFRC Ratings Summary

Line Number		Ratings			
1	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
2	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
3	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
4	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
5	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
6	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
7	uValue	0.34	0.24	SHGC	WIG-A-16-00557-00001
	CR	44	1.52	VT	
Line Number		Ratings			
8	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
9	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
10	uValue	0.51	0.18	SHGC	WIG-A-30-00852-00002
	CR	39	1.42	VT	
Line Number		Ratings			
11	uValue	0.54	0.18	SHGC	WIG-A-21-00650-00002
	CR	31	1.52	VT	

Weighted NFRC Values

Line	Unit	QTY	W x H (in)	Sq. Ft.	Weighted Average U-Factor	Weighted Average SHGC



Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

TOTALS	**0.00**	-	-

- Weighted NFRC Notes:
  - Weighted values are provided for reference only; always consult job specific code requirements to ensure compliance.
  - For special order line items as well as any other questions on ratings please consult with your sales representative.

Project Information 857486

Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems



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Review Product Information, Terms & Conditions, and Frequently Asked Questions (FAQs) at:

www.westernwindowsystems.com/terms-and-conditions and www.westernwindowsystems.com/support/faq (Custom Orders) and

www.westernvolumeprogram.com/terms-and-conditions and www.westernvolumeprogram.com/support/faq (Volume Program)

Quotes & Orders

All quotations will be subject to change unless an order is placed within 60 days from the quotation date and written approval is sent to the Registered Dealer. Further price holds may be available for Volume Program ("VP") orders, but must be agreed to in writing by a member of the VP management team.

Lead Times & Ship Dates

Custom Orders

All products are manufactured to your specifications. The lead time will vary depending upon your requirements and begins when we receive your signed Approval Packet (consisting of a signed Dealer Quotation, any required deposits, and signed shop drawings and color chip, if applicable). Please allow sufficient lead time as advised by your sales representative. All lead times and shipment dates (whether provided in a Quotation, Acknowledgement, or otherwise) are estimates only. Western Window Systems uses commercially reasonable efforts to fill orders in accordance with the estimated lead time and shipment date. However, Western Window Systems will not be responsible for any delays in filling an order nor be liable for any losses or damages resulting from such delays, and no order shall be subject to cancellation for such delays.

Volume Orders

VP Program lead times vary by product type and are estimated as follows: 7600 Series VP doors = 10 production days, 600 Series VP doors = 10 production days, 3600 Series VP doors = 5 production days; and Semi-Custom doors = 15 production days. (All lead time measurements described herein relate to production days and therefore, do not include time for shipment or delivery). Western Window Systems uses commercially reasonable efforts to fill orders in accordance with the estimated lead time and shipment date. However, Western Window Systems will not be responsible for any delays in filling an order nor be liable for any losses or damages resulting from such delays, and no order shall be subject to cancellation for such delays.

Important Notes

Western Window Systems is not responsible for determining the suitability of any product for a particular project, design, application, climate, condition, use, or customer need or purpose. Western Window Systems is not responsible for determining whether the incorporation of its products into a building design will achieve a particular third-party certification or standard as windows and doors are only one factor in the building envelope. Determining such product suitability is the responsibility of the architect, contractor, registered dealer, installer, owner, user, and/or other construction professionals. Western Window Systems will also not be responsible for any claims or damage arising from inappropriate selection of products, faulty building design or construction, improper installation, or inaccurate orders.

Western Window Systems also does not control the application or selection of its product configurations, sealant, or glazing materials and assumes no responsibility therefore. It is the responsibility of the architect, contractor, registered dealer, installer, owner, user, and/or other construction professionals to make these selections in strict compliance with applicable laws and codes.

Registered Dealer is solely responsible for ensuring product shipments are safely received. The Registered Dealer shall provide, or require third-party recipients to provide, at least two (2) individuals to offload products from the truck at the time of delivery. Any failure to provide appropriate personnel may result in the inability to make delivery as scheduled. Western Window Systems will not be responsible for any damages or inconvenience caused by any such delayed shipment and the Registered Dealer shall defend, indemnify, and hold Western Window Systems' harmless from any and all claims, demands, or lawsuits arising from or relating to such delayed shipment.

Installation

Western Window Systems does not install its products and is therefore not responsible for any installation defects, errors, or omissions. The Registered Dealer is solely responsible to take reasonable steps to ensure WWS' products are installed properly and in strict compliance with American Architectural Manufacturers Association ("AAMA") requirements, applicable building codes and regulations, and Western Window Systems' written installation instructions, such as only engaging, hiring, or recommending experienced installation professionals or selling products to building/construction professionals who are responsible for ensuring proper installation.

Warranties: exclusive remedy

Western Window Systems provides express limited warranties with its Products, which are available at www.westernwindowsystems.com/faq/warranty. Western Window Systems makes no other warranties and expressly disclaims all other representations, warranties, conditions, or covenants of any kind, either statutory, express, or implied including without limitation, any implied warranties of merchantability or fitness for a particular purpose, use, climate, condition, or durability. No distributor, dealer (Registered or otherwise), employee or representative of Western Window Systems has the authority to change, extend, or in any way modify Western Window Systems' express limited warranties, either orally or in writing, and any such modification will have no force or effect.

Additional express limited warranties may also be offered by third-party component manufacturers. Contact your Registered Dealer for further details.

Satin Anodized finishes have inherent color variance between profiles. While any visual differences between profiles are supplied within industry standard tolerances, WWS cannot guarantee exact color consistency.

Project Information 857486

Project Name: Unassigned
Quote Name: Kristin Miller
PO Number: Enter Customer PO
Bid by:

Estimated Ship Date: Quote Not Ordered
Ship Via: CA - Arranged by Western Window Systems

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be a yardstick of quality

some people aren't used to an environment where excellence is expected

▸ steve jobs

Setup Charges:	$624.90
Sub Total:	$88,110.36
Sales Tax:	$9,185.97
Freight:	$750.00
Miscellaneous:	$0.00
Grand Total (USD):	$98,046.33

Date:

Authorized Signature Required

The undersigned hereby acknowledges that he/she has read and understands Western Window Systems' Terms and Conditions and will provide a copy of Western Window Systems' Product Information sheet to the property owner.

SYMBOLS

Elevation Marker

Revision

Detail

Detail
Sheet Number

Exterior Elevation
Sheet Number

Interior Elevation
Sheet Number

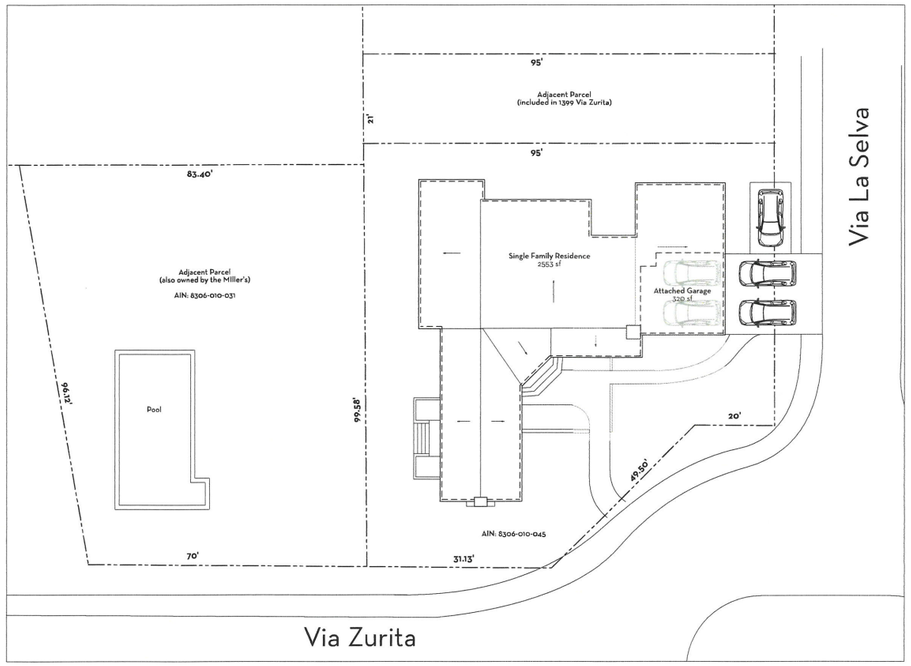
Existing Wall

Wall to be removed

New Wall

PROJECT DESCRIPTION

Project involves replacing existing windows with new Low-E Dual Glazed windows. The new windows will have divided lites and look close to the existing original windows (not aluminum sliders). The proposal also includes modifications to the existing breezeway, den and primary bedroom window configurations. The breezeway exterior modifications will be visible from the street. The proposed elevation would closely match the elevation/windows to the East of the entry. The den would involve removing the aluminum sliding door, replace it with a bank of windows, and removing the wood staircase outside. The changes in the primary bedroom would include removing/eliminating the window on the North wall, and installing (3) new windows along the West wall.



1 **Site Plan**
Scale: 1/16" = 1'-0"



Existing Elevation Looking Southwest - corner Via Zurita and Via La Selva



Proposed Exterior - ENTRY/BREEZEWAY



Proposed Interior - Looking North through BREEZEWAY



Proposed Exterior - DEN & LIVING ROOM

GENERAL NOTES

GENERAL NOTES

Noise sources associated with construction activities shall not exceed the noise levels as set forth in chapter 16.134 of the Municipal Code. **In addition, construction hours are from 7:00am until 8:00pm., Monday through Saturday. No work to occur on Sunday or holidays.**

During the course of all construction activity, the applicant shall employ adequate dust control measures in accordance with the uniform building code, SCAQMD, and city requirements to minimize fugitive dust.

All work on this project is to be performed and completed in conformity with the recent editions of the Claremont Municipal Code and the California building, plumbing, mechanical, electrical and energy codes.

All work is subject to field inspection, any approvals that appear to authorize non-conformity with adopted standards are not valid. C.B.C. Appendix 1 Sections 105.4, 106.1.

Final inspection is required from the planning division when work is completed. The applicant shall contact planning division staff and schedule an appointment for such an inspection prior to the final building division inspection.

All new work shall comply with the following codes:

2022 CBC
2022 California Mechanical Code
2022 California Plumbing Code
2022 California Electrical Code
Claremont Municipal Code
2022 California Residential Code
2022 California Energy Code
2022 CalGreen Code

ENERGY NOTES

A. All installed luminaires shall be high efficacy in accordance with Table 150.0-A.

B. In bathrooms, garages, laundry rooms, utility rooms, and walk-in closets, at least one installed luminaire shall be controlled by an occupancy sensor or vacancy sensor providing automatic-off functionality.

C. Recessed downlight luminaires recessed into ceilings shall meet all the following; shall not contain screw base lamp sockets, have a label that certifies the luminaire is airtight with a leakage less than 2.0CFM at 75 pascals, sealed with a gasket or caulk, and meet the clearance and installation requirements of CEC 410.116 for recessed luminaires.

D. All outdoor lighting shall be controlled by a manual ON and OFF switch that does not override to ON unless the override automatically returns the automatic control to its normal operation within 6 hours and one of the following; controlled by a photocell and either a motion sensor or an automatic time switch control; or controlled by an astronomical time clock control; or energy management control system. CBEES 150(k).3

E. No controls shall bypass a dimmer or vacancy sensor function where that dimmer or vacancy sensor has been installed to comply with 150.0(k).

All fans that exhaust air from the building to outside air shall be provided with backdraft or automatic dampers to prevent air leakage 130 (M)

A radiant barrier is required at all new roofing.

First 3' of hot water piping in unconditioned space shall be insulated. 150 (J)

ELECTRICAL NOTES

Provide combination-type afci protection for all branch circuits that supply 125v 15- and 20- amp outlets (receptacles, lights and smoke detectors). CEC 210.12 (B).

Recessed lighting fixtures shall be IC- & AT- rated. CEC410.66(B) & CEC (energy) 150(K)

15- and 20- amp receptacles installed outdoors shall have an enclosure that is weatherproof whether or not the attachment plug cap is inserted or removed. CEC406.8(B)(1)

Provide dedicated 20-amp branch circuit for each of the following:
A. (2) small appliance circuits in kitchen cec 210.11 (C)(2).
B. Laundry rooms cec 210.11 (C)(2).
C. Bathrooms cec 210.11 (C)(3).

Smoke detectors shall be hardwired. Comply with CBC 907.2.10.1.2

All receptacles shall be 'tamper resistant' CEC 406 recessed lighting above tubs/showers shall be approved for damp/wet locations.
CEC 410.4 (D).

PROJECT ADDRESS

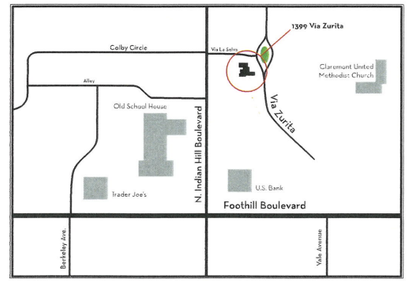
1399 Via Zurita
Claremont, California 91711

PROJECT INFO

AIN: 8306-010-045
TRACT: #13581
ZONING: RR 10,000

YEAR BUILT: 1926

Note: currently in Mills Act application review



Vicinity Map

PROJECT DATA

Occupancy Group: **R-3**

Area (sq. ft.): **(E) Single Family Residence: 2,553**
(E) Garage: 320

Building Stories: **1**

Type of Construction: **V-B**

Sprinklered: **No**

Valuation: **$90,000**

Wildland Urban Interface (WUI) Fire Area: **Low**
Flood Zone: **No**

Risk Catagory: **II**
Site Class (seismic): **D-default**
Seismic Design Catagory: **D**
Special Wind Region: **No**
Snow Loads: **No**

OWNER Kristin & Alan Miller
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e: alanmiller3711@gmail.com

DESIGNER Amy Berssen
10th + Yale Studios
1003 Yale Avenue
Claremont, California 91711
t: 310)804-7512
e: amy@10thandyalestudios.com

TITLE 24 LRG Designs
P.O. Box 47478
Los Angeles, California 90047
t: 323)955-9827
e: lrgdesigns914@gmail.com
w: lrgenergydesign.com

ENGINEER TBD

CONTRACTOR TBD

AREA CALCULATIONS

LOT AREA:	10,150	sf
(E) Single Family Residence:	2,553	sf
(E) Attached Garage	320	sf
TOTAL EXIST. BLDG. AREA	2,873	sf
TOTAL PROP. BLDG. AREA (no change to existing):	2,873	sf
ALLOWABLE SITE COVERAGE:	35% = 3,558	sf
SITE COVERAGE (proposed unchanged):	25% = 2,553	sf

PARKING EXISTING (unchanged): (2) covered & (3) uncovered - 5 spaces total

SHEET INDEX

A0.0 Project Info/Site Plan/General Notes
A1.0 Demo Plan
A1.1 Floor Plan
A2.0 Exterior Elevations
S-1 Structural: in-progress
T-1 Title 24 Report: in-progress

designer:
Amy Berssen
t: 310-804-7512
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10th studios

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e: alanmiller3711@gmail.com

project: **Miller Residence - Phase 1 Remodel**

address: 1399 Via Zurita
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date: 5/4/26

revisions::
BID SET
NOT FOR CONSTRUCTION

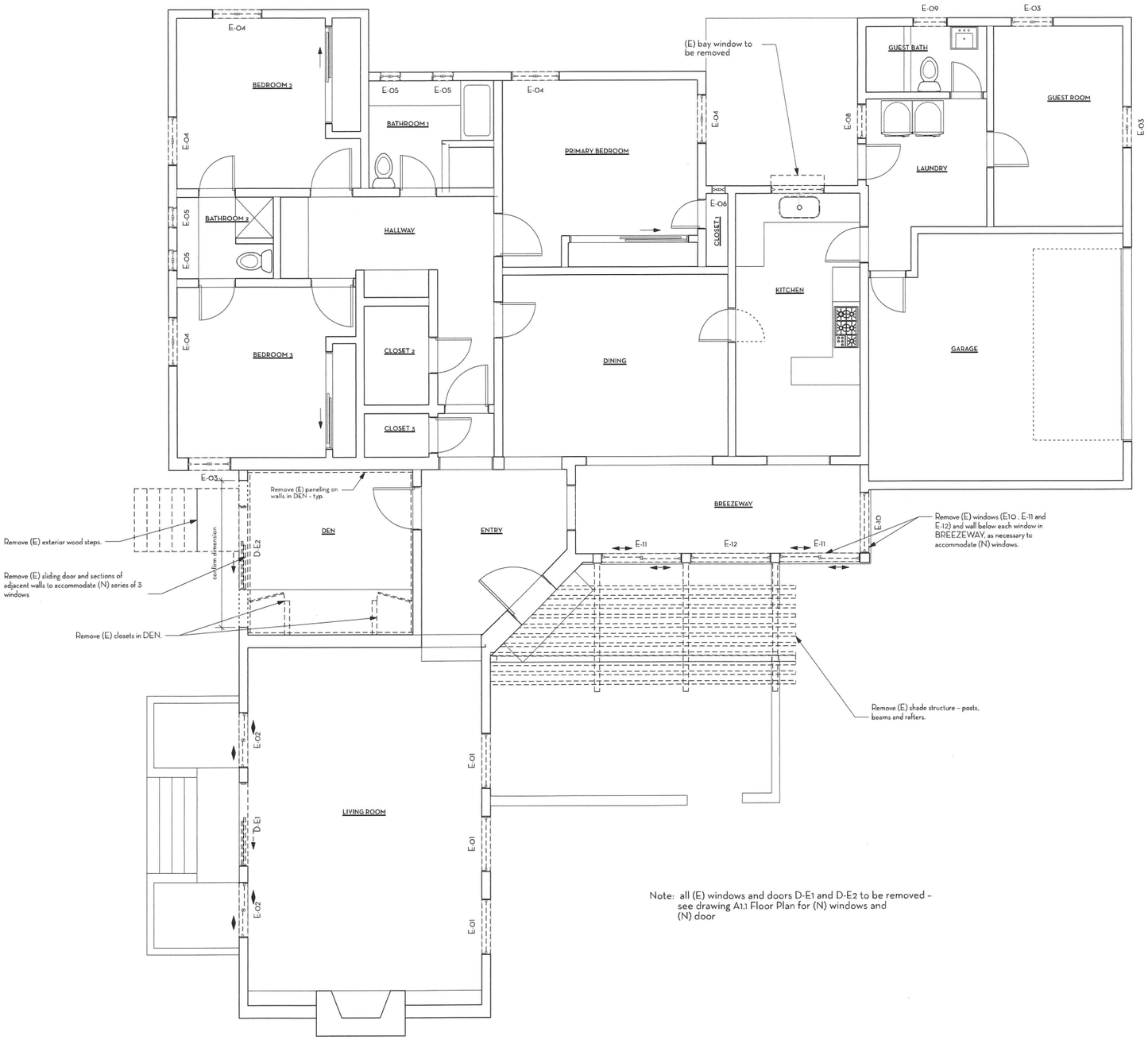
drawing title:

Project Info

scale: as noted

drawings prepared by:
Amy Berssen

A0.0



Note: all (E) windows and doors D-E1 and D-E2 to be removed - see drawing A1.1 Floor Plan for (N) windows and (N) door

1 **Plan - Demo**
Scale: 1/4" = 1'-0"

EXISTING WINDOW SCHEDULE

WINDOW NO.	FINISHED OPENING	WINDOW TYPE	QUANTITY	MANUFACTURER (LINE)	CONSTRUCTION	FACING/FINISH	GLASS	Remove
E-01	48"w x 60"h	fixed	3	unknown	wood/glass	painted	transparent - single glazed	yes
E-02	48"w x 60"h	sliding	2	unknown	aluminum/glass	metal	transparent - single glazed	yes
E-03	36.5"w x 48"h	bi-parting casement	3	unknown	wood/glass	painted	transparent - single glazed	yes
E-04	42.5"w x 48"h	bi-parting casement	5	unknown	wood/glass	painted	transparent - single glazed	yes
E-05	18"w x 24"h	jalousie	1	unknown	aluminum/glass	metal	transparent - single glazed	yes
E-06	12"w x 24"h	casement	1	unknown	wood/glass	painted	transparent - single glazed	no
E-07	46.5"w x 46 3/4"h	bay	1	unknown	aluminium/glass	metal	transparent - single glazed	yes
E-08	30"w x 44.5"h	jalousie	1	unknown	wood/glass	painted	transparent - single glazed	yes
E-09	24.5"w x 36"h	jalousie	1	unknown	wood/glass	painted	transparent - single glazed	yes
E-10	52.75"w x 60"h	fixed	1	unknown	aluminum/glass	metal	transparent - single glazed	yes
E-11	70.5"w x 60"h	sliding	2	unknown	aluminum/glass	metal	transparent - single glazed	yes
E-12	70.5"w x 60"h	fixed	1	unknown	aluminum/glass	metal	transparent - single glazed	yes

EXISTING DOOR (with Glazing) SCHEDULE

DOOR NO.	DOOR OPENING	DOOR TYPE	QUANTITY	MANUFACTURER (LINE)	CONSTRUCTION	FACING/FINISH	GLASS	REPLACEMENT
D-E1	72"w x 80"h	sliding	1	unknown	aluminum/glass	metal	trasparent single glazed	yes
D-E2	60"w x 80"h	sliding	1	unknown	aluminum/glass	metal	trasparent single glazed	yes

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project: **Miller Residence - Phase 1 Remodel**
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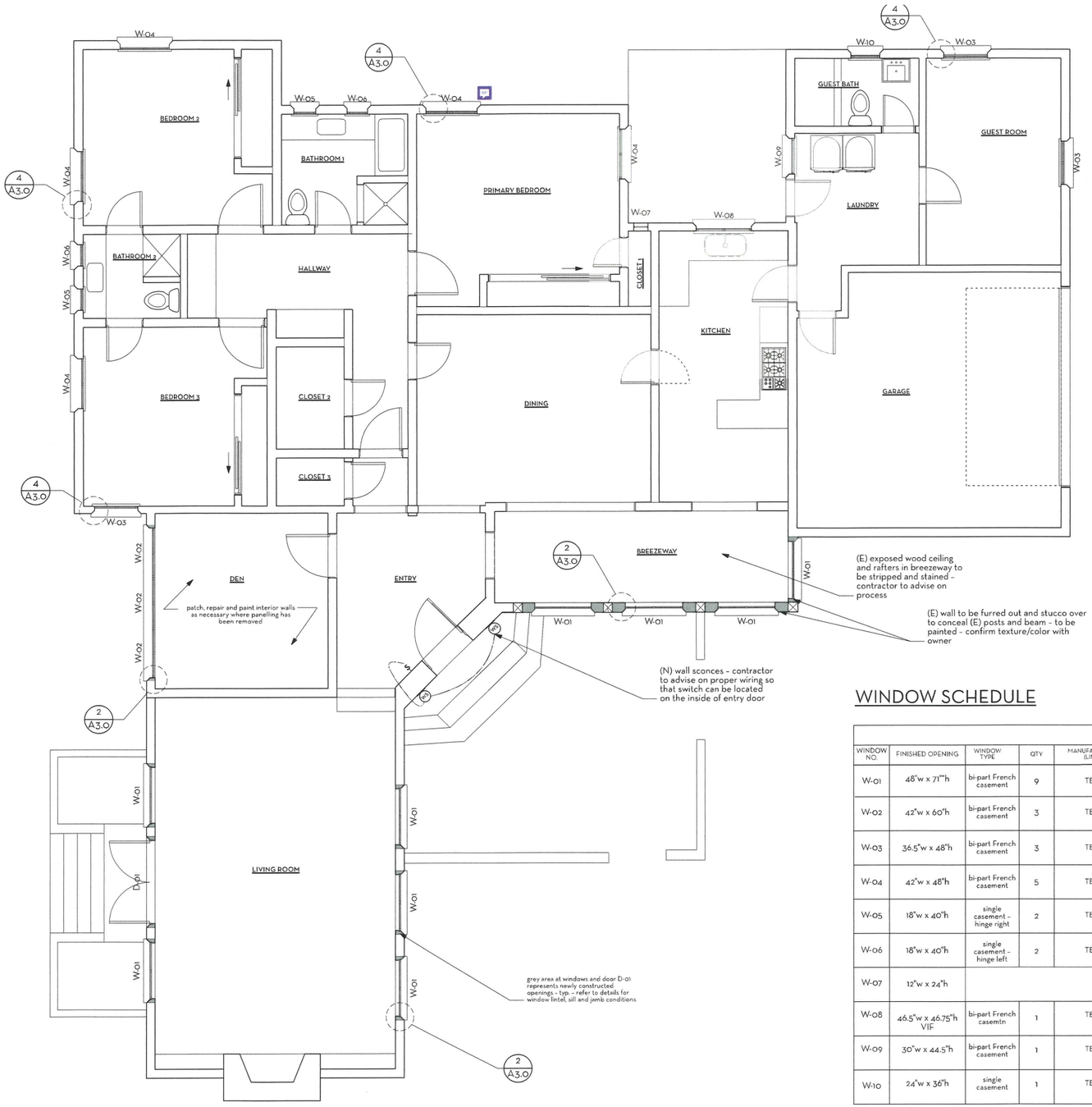
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drawing title:
Demo Plan

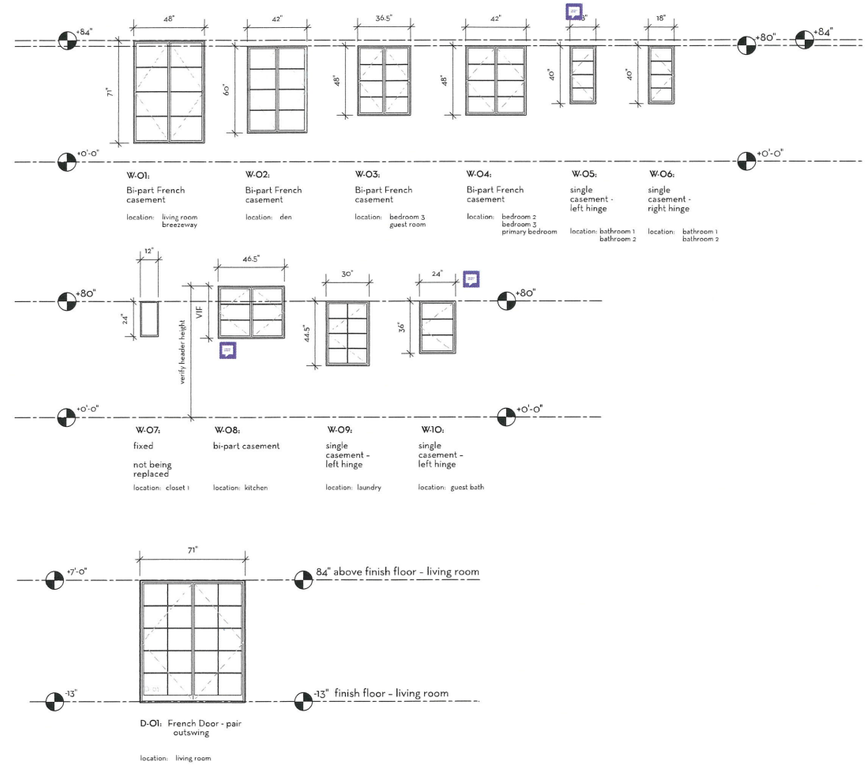
scale: as noted

drawings prepared by:
Amy Berssen

A1.0



2 Plan
Scale: 1/4" = 1'-0"



WINDOW SCHEDULE

Note: contractor to verify all window sizes before ordering - dimensions on schedule have not been confirmed

									DETAILS					NOTES
WINDOW NO.	FINISHED OPENING	WINDOW TYPE	QTY	MANUFACTURER (LINE)	CONSTRUCTION	FACING/FINISH	GLASS	FRAME	HEAD	JAMB	SILL	OPENING	TRIM	
W-01	48"w x 71""h	bi-part French casement	9	TBD	TBD	black or dark bronze	transparent - dual glazed - low E - tempered tempered ?	TBD	detail: #1 sheet: A3.0	detail: #2 sheet: A3.0	detail: #1 sheet: A3.0	new construction	TBD	finish floor of living room is 13" lower than Breezeway - header is 84" above finish floor of each location
W-02	42"w x 60"h	bi-part French casement	3	TBD	TBD	black or dark bronze	transparent - dual glazed - low E - tempered tempered ?	TBD	detail: #1 sheet: A3.0	detail: #2 sheet: A3.0	detail: #1 sheet: A3.0	new construction	TBD	all (3) W-02 windows to be mulled together - combination of windows will share a sill and header - see sample detail #6 on sheet A3.0
W-03	36.5"w x 48"h	bi-part French casement	3	TBD	TBD	black or dark bronze	transparent - dual glazed - low E	TBD	detail: #3 sheet: A3.0	detail: #4 sheet: A3.0	detail: #3 sheet: A3.0	retrofit	wood to match (E)	
W-04	42"w x 48"h	bi-part French casement	5	TBD	TBD	black or dark bronze	transparent - dual glazed - low E	TBD	detail: #3 sheet: A3.0	detail: #4 sheet: A3.0	detail: #3 sheet: A3.0	retrofit	wood to match (E)	
W-05	18"w x 40"h	single casement - hinge right	2	TBD	TBD	black or dark bronze	transparent - dual glazed - low E	TBD	detail: #3 sheet: A3.0	detail: #4 sheet: A3.0	detail: #3 sheet: A3.0	retrofit	wood to match (E)	
W-06	18"w x 40"h	single casement - hinge left	2	TBD	TBD	black or dark bronze	transparent - dual glazed - low E	TBD	detail: #3 sheet: A3.0	detail: #4 sheet: A3.0	detail: #3 sheet: A3.0	retrofit	wood to match (E)	
W-07	12"w x 24"h	W-07 (E-06) - to remain unchanged												
W-08	46.5"w x 46.75"h VIF	bi-part French casemtn	1	TBD	TBD	black or dark bronze	transparent - dual glazed - low E	TBD	detail: #3 sheet: A3.0	detail: #4 sheet: A3.0	detail: #3 sheet: A3.0	retrofit	wood to match (E)	(N) window to meet (E) lintel - remove and repair stucco as necessary
W-09	30"w x 44.5"h	bi-part French casement	1	TBD	TBD	black or dark bronze	transparent - dual glazed - low E	TBD	detail: #3 sheet: A3.0	detail: #4 sheet: A3.0	detail: #3 sheet: A3.0	retrofit	wood to match (E)	
W-10	24"w x 36"h	single casement	1	TBD	TBD	black or dark bronze	transparent - dual glazed - low E	TBD	detail: #3 sheet: A3.0	detail: #4 sheet: A3.0	detail: #3 sheet: A3.0	retrofit	wood to match (E)	

DOOR SCHEDULE

Note: contractor to verify door size before ordering - dimensions on schedule have not been confirmed

									DETAILS					NOTES
DOOR NO.	DOOR OPENING	DOOR TYPE	QUANTITY	MANUFACTURER (LINE)	CONSTRUCTION	FACING/FINISH	GLASS	FRAME	HEAD	JAMB	SILL	OPENING		
D-01	71"w x 84"h	bi-part French outswing	1	TBD	TBD	TBD	tempered - transparent - T-24 compliant	TBD	detail: #1 sheet: A3.0	detail: #2 sheet: A3.0	TBD	new construction		retractable screen to be included - door to be installed according to manufacturer's specifications

designer:
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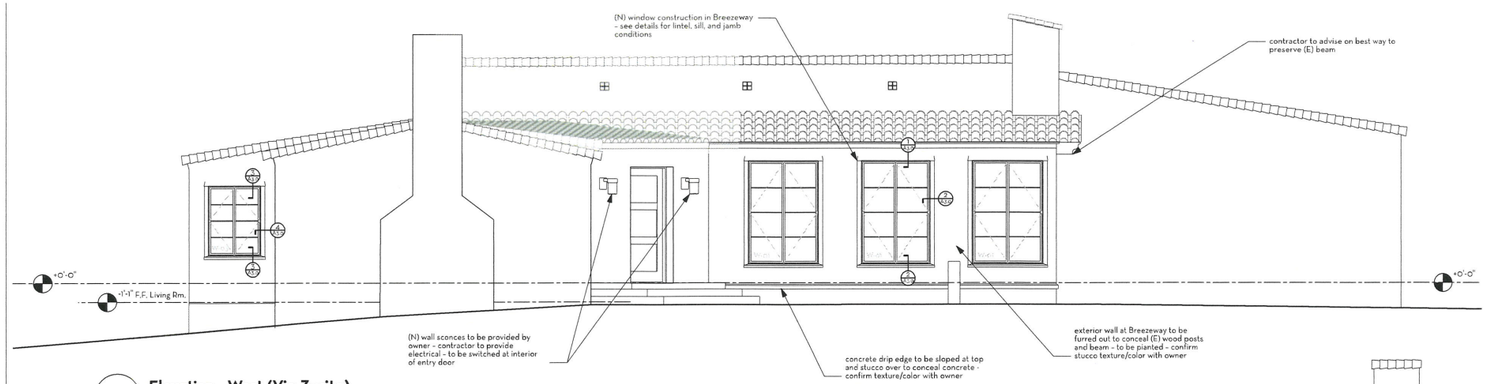
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revisions::
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drawing title:
Floor Plan

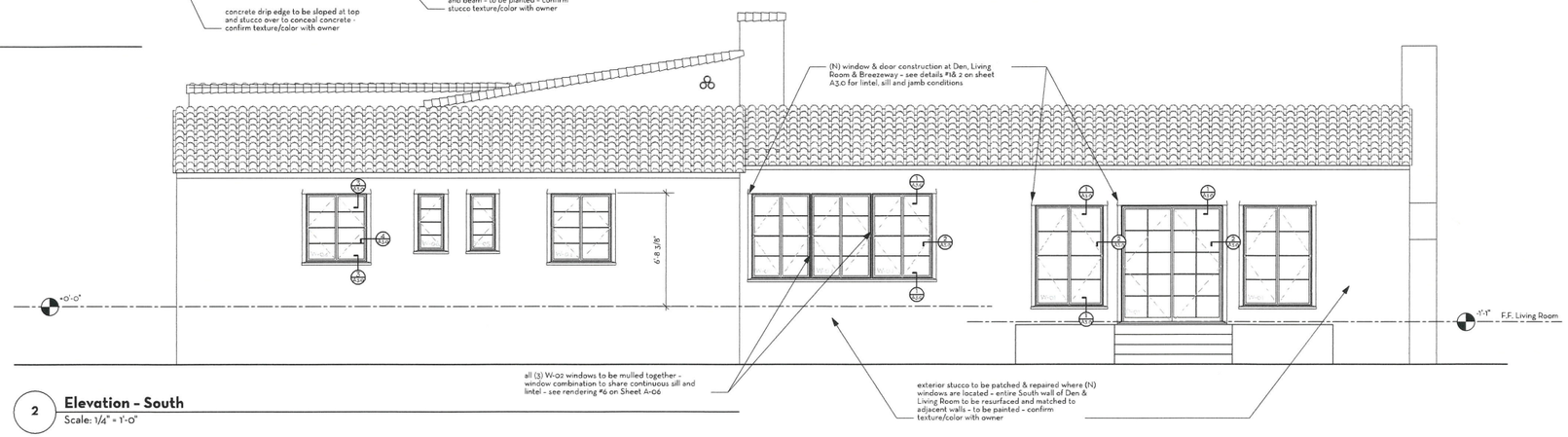
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drawings prepared by:
Amy Berssen

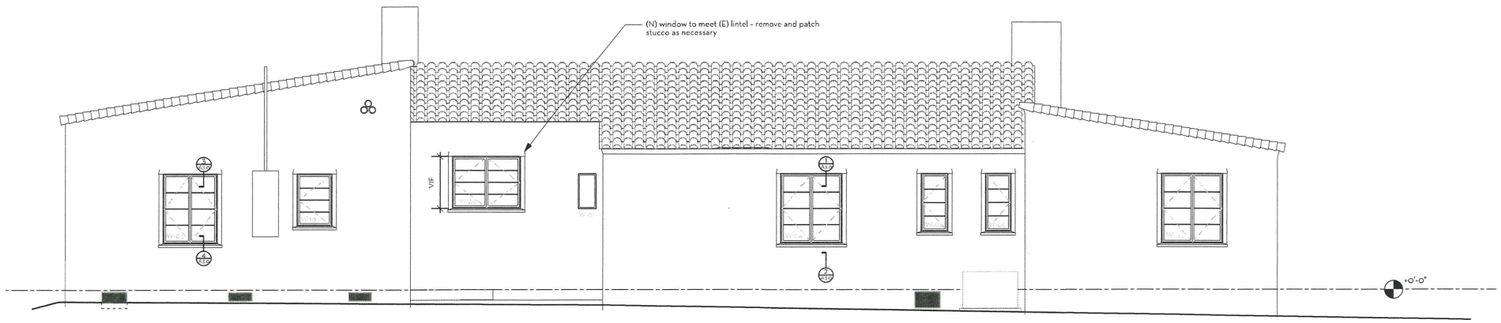
A1.1



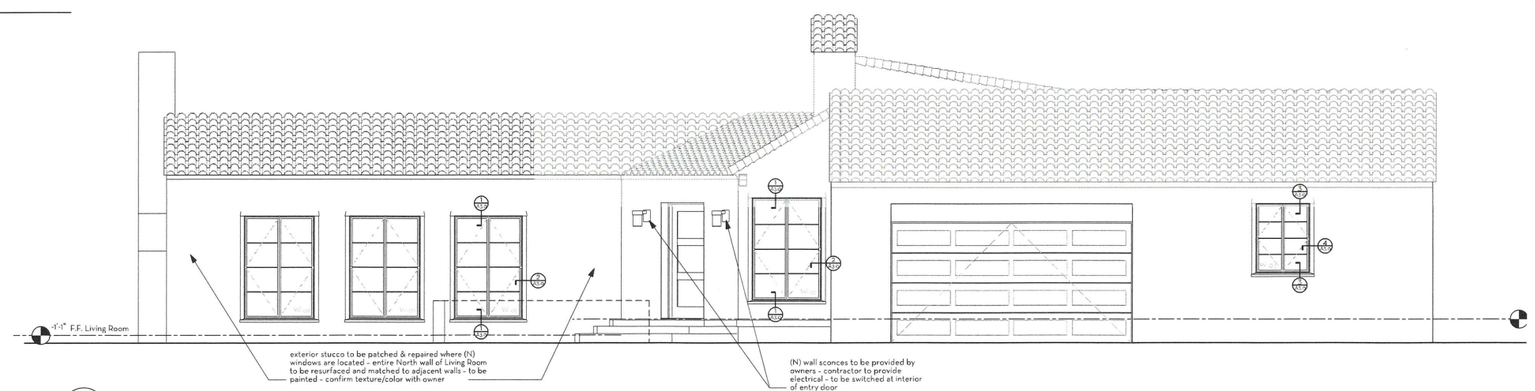
3 Elevation - West (Via Zurita)
Scale: 1/4" = 1'-0"



2 Elevation - South
Scale: 1/4" = 1'-0"



1 Elevation - East
Scale: 1/4" = 1'-0"



4 Elevation - North (Via La Selva)
Scale: 1/4" = 1'-0"

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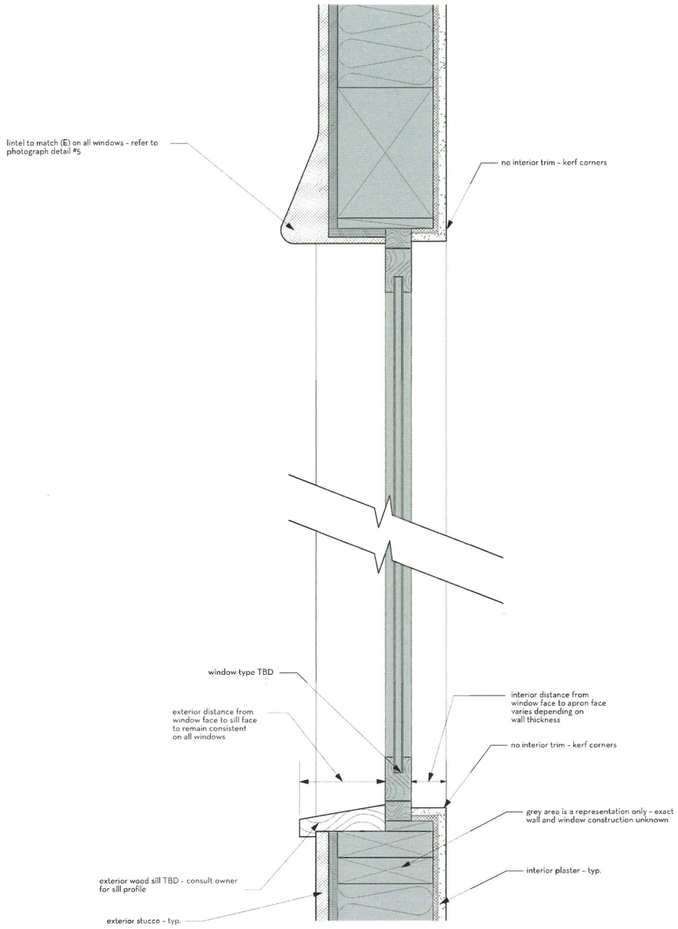
drawing title:

Exterior Elevations

scale: as noted

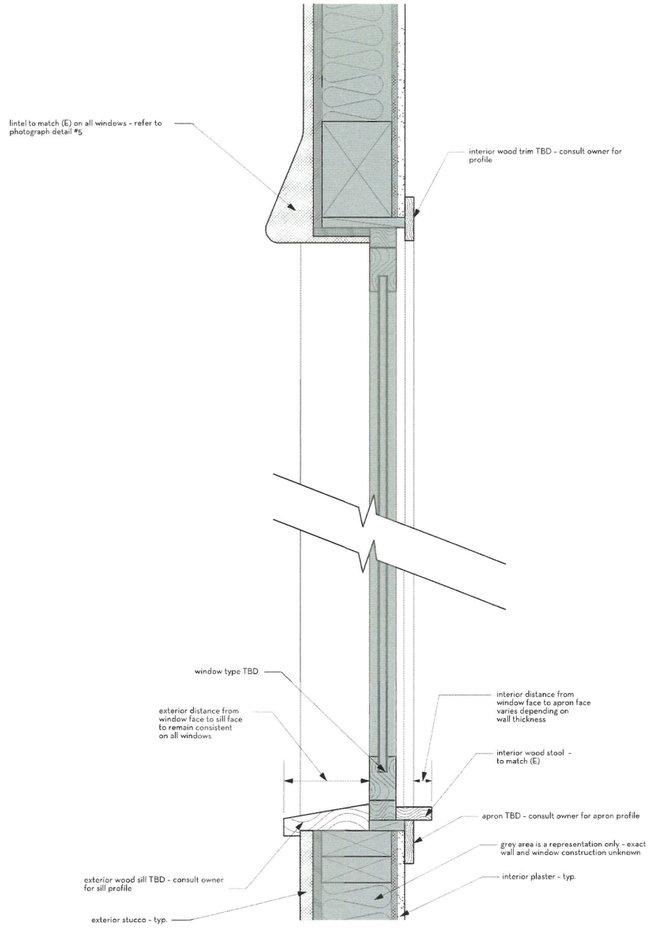
drawings prepared by:
Amy Berssen

A2.0

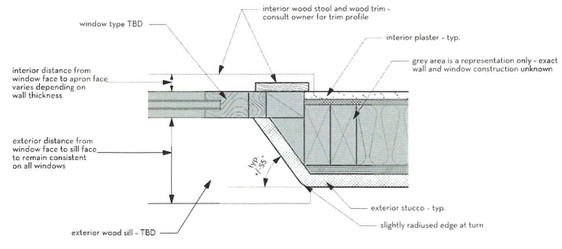


1 window detail @ sill - new construction
Scale: 3" = 1'-0"
Note: this detail applies to W-01, W-02, & D-01

2 window edge/trim detail @ jamb - new construction
Scale: 3" = 1'-0"
Note: this detail applies to W-01, W-02, & D-01



3 window detail @ sill & lintel - retrofit
Scale: 3" = 1'-0"
Note: this detail applies to W-03 thru w-06 & W-08 thru W-10



4 window edge/trim detail @ jamb - retrofit
Scale: 3" = 1'-0"
Note: this detail applies to W-03 thru w-06 & W-08 thru W-10



5 existing lintel, jamb & sill detail
Scale: not to scale



6 DEN windows - combination/mulled windows
Scale: not to scale

Note: details are for bidding purposes only - not for construction

designer:
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drawing title:
Details

scale: as noted

drawings prepared by:
Amy Berssen

A3.0

State of California — The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

HISTORIC RESOURCES INVENTORY

Ser. No. _____
HABS ____ HAER ____ NR ____ SHL ____ Loc ____
UTM: A _____ B _____
C _____ D _____

IDENTIFICATION

1. Common name: _____
2. Historic name: _____
3. Street or rural address: 1399 Via Zurita
   City Claremont Zip 91711 County L.A.
4. Parcel number: 8306-010-045
5. Present Owner: Neil & Isabel Thomas Address: same
   City _____ Zip _____ Ownership is: Public _____ Private x
6. Present Use: residence Original use: same

DESCRIPTION

7a. Architectural style:

7b. Briefly describe the present *physical description* of the site or structure and describe any major alterations from its original condition:

One story white stucco Spanish Colonial revival style. From the street the red clay tile roof appears flat. A low pitched red clay tile roof with wood support beams covers a stucco-walled entrance area. Mature landscaping obscures the view of much of the house.



8. Construction date:
   Estimated _____ Factual 1926
9. Architect Thorne & Ficker
10. Builder _____
11. Approx. property size (in feet)
    Frontage 100' Depth 80'
    or approx. acreage _____
12. Date(s) of enclosed photograph(s)
    1985

13. Condition: Excellent X Good ____ Fair ____ Deteriorated ____ No longer in existence ____

14. Alterations: ____

15. Surroundings: (Check more than one if necessary) Open land ____ Scattered buildings ____ Densely built-up ____
Residential X Industrial ____ Commercial ____ Other: ____

16. Threats to site: None known X Private development ____ Zoning ____ Vandalism ____
Public Works project ____ Other: ____

17. Is the structure: On its original site? X Moved? ____ Unknown? ____

18. Related features: ____

SIGNIFICANCE

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

The house was built by José' Pijoan, who was born in Barcelona, Spain. He was an art critic and Acting Professor of Hispanic Civilization at Pomona College. He brought Orozco here from Mexico to paint the Prometheus Mural in Frary Refectory at Pomona College.

Millard Sheets and Judge James White were later residents of the house.

September 16, 1926 Page 3 Courier

On a plaza and across the street from the Williams' house and occupying a corner location, work was commenced last week on Joseph Pijoans' home. Spanish California architecture. Thorne and Ficker Architects. Nine rooms all on one floor. Double garage integral part of one wing of the house which will be L shaped. Exterior is to be of rough stucco with a tile roof. Veranda has a tile floor with supporting rustic posts for the heavy roof, etc. etc., etc.

20. Main theme of the historic resource: (If more than one is checked, number in order of importance.)
Architecture X Arts & Leisure ____
Economic/Industrial ____ Exploration/Settlement X
Government ____ Military ____
Religion ____ Social/Education X

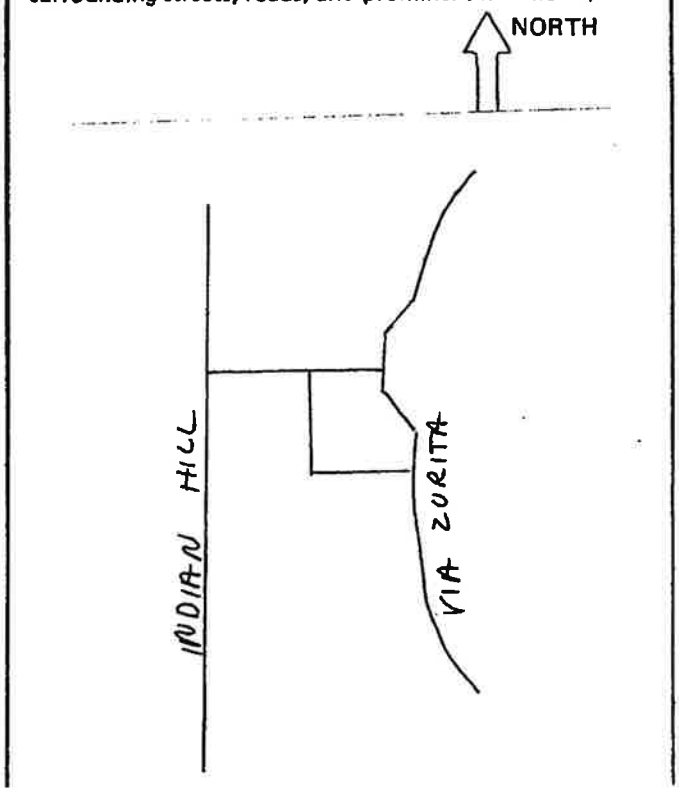
21. Sources (List books, documents, surveys, personal interviews and their dates).

Personal interview:
Mary Blanchard

Brackett - "Granite & Sagebrush"

22. Date form prepared 7/85
By (name) Barkey
Organization Claremont Heritage
Address: 590 W. Bonita
City Claremont Zip 91711
Phone: 714/621-0848

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



Dear City of Claremont Planning Division,

We are submitting our Mills Act Application, as we believe our property at 1399 Via Zurita Street in Claremont is a qualified candidate. Built in 1926, this home is an example of the Spanish Colonial Revival style, has historical associations and is built in a community noted for its character - Via Zurita Street neighborhood, as featured in a Claremont Heritage Home Tour (https://claremontheritage.org/events.html). Characteristic features include its stucco walls, red tile roof, and an indoor-outdoor design that was innovative for its time.

The home was designed by the architectural firm Thorne and Ficker and is one of the original four custom homes developed by Scripps College in the 1920s for its distinguished faculty. Additionally, the artist Millard Sheets is credited with significant contributions to its design.

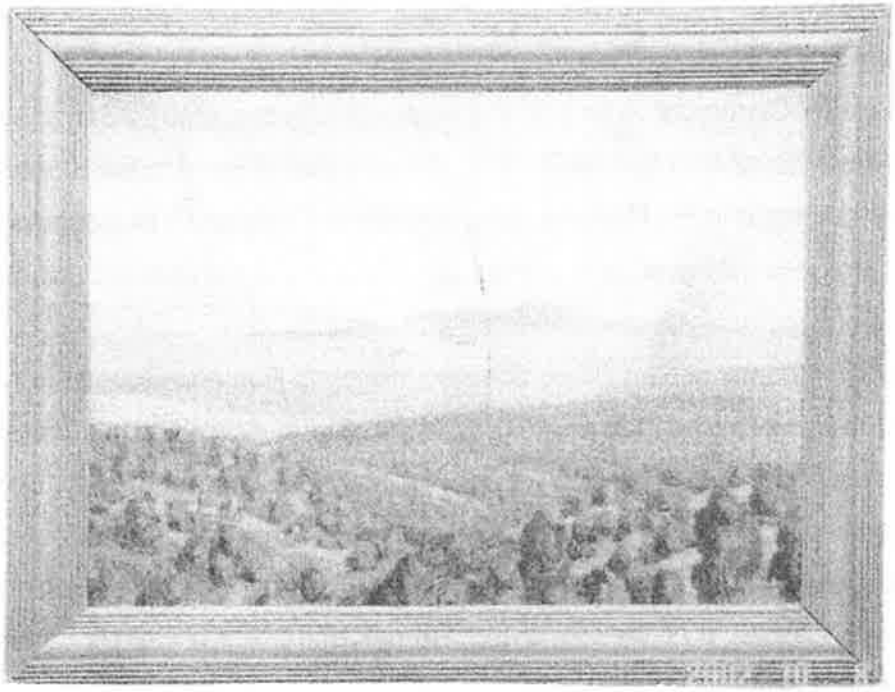
As part of our Mills Act rehabilitation and ongoing maintenance plan, we propose to install new, high-performance windows that are compatible with the home's character-defining features and original design intent, while improving energy efficiency, comfort, and long-term durability. We also plan to rehabilitate and redesign the enclosed breezeway so that its massing, form, and detailing more closely reflect the property's historic architectural character. Collectively, these improvements are intended to preserve and enhance the historic fabric of the residence, support its long-term sustainability, and maintain the community's historic heritage.

Thank you!

Kristin and Alan Miller

VIA ZURITA

A CLAREMONT NEIGHBORHOOD



Painted by Nelly G. Alexander, once a resident of
Via Zurita, sometime before 1943

By Bryna Herbold and Joyce Landrey
January, 2003

Via Zurita Neighborhood

Via Zurita is a small pocket of custom homes north of Foothill Blvd. and south of the Claremont Golf Course. It is accessed from the east side of Indian Hill Blvd. Set amongst pines, eucalyptus, oaks, pepper and olive trees, the Via Zurita neighborhood has twenty-two houses counting the two on Via Los Altos that actually have Via Zurita postal addresses. One of those, at 1444, at the back of the Claremont United Methodist Church property, was moved to the neighborhood in 1981 from the vicinity of Indian Hill and Harrison and has housed over 100 refugees and ministers over the years. In addition to the current residents, raccoons, possums, ground squirrels, quail and coyotes are seen from time to time.

Via Zurita, like all of Claremont, is on land that was originally occupied by Serrano Indians and became part of the Mission San Gabriel in 1771. It was a part of Rancho San Jose starting in 1837. The land later belonged to the Pomona Land and Water Company. Surrounding areas were planted in citrus groves; however, only a small part of the Via Zurita area was planted with citrus.

In 1924, Ellen B. Scripps of San Diego donated money to Pomona College to purchase the land which became known as the Indian Hill Tract/Scripps Tract. According to a Claremont Courier article (probably from 1926), plans were drawn up by the Claremont Realty Corporation to develop a "unique home community on the Southwest corner of the Scripps Tract, with parks, drives, and walks to make it attractive," to be called "College Park." The corporation board of trustees included Fred L. Lucas, A.G. McKenna, J.C. Harper, and D.A. Schweitzer. The orginial plans included public utilities.

The Courier article continues to describe the proposed community: "In the plans for the tract every care has been taken to provide for the most beautiful and comfortable surroundings for each home. A carefully drawn up code of restrictions will assure all residents a pleasant environment. Lots will be of sufficient size to afford light, air, lawns, breezes, and comparative privacy to each family. One other important advantage has been secured, in that each home is to have an unrestricted view of the mountains."

A map of the proposed "College Park" (circa 1926) is in the appendix. It shows several streets which have Spanish names, including the name "Via Zurita" which means "Way of the Quail." The community was to extend farther east. The "College Park" plan was never completely implemented. Today Via Zurita, plus the twelve homes in the 1300 and 1400 blocks of Indian Hill, reflects much of the early design including irregularly shaped lots, curved streets, and

bedroom to the basement potting shed.

Other notable early residents were from outside the college community. One of the earliest houses, at 1475, was built by James and Eunice Judy. He was vice-president of Vortox Manufacturing Co. and was active with the Padua Players. Judge James Whyte lived at 1399 for a period ending in 1967. Knox Mellon, who has been California State Historic Preservation Officer since 1975, was the original owner of 1342. (See a copy of an e-mail from Knox Mellon to Joyce Landrey in the appendix.)

Another notable resident is Martha Palmer Fuller, a retired teacher, who continues to live in the concrete block and brick house built for her by John Longenecker in 1951. She is Via Zurita's longest term resident and the great niece of Henry Austin Palmer, who moved to Claremont in 1884. In her book Claremont: A Pictorial History, Judy Wright refers to him as "president of the powerful Pomona Land and Water Company" which owned many acres in Pomona and south Claremont, as well as "president of the Pomona Bank and a founder of the Pilgrim Congregational Church in Pomona."

For many years Via Zurita neighbors have attended an annual potluck in September. This strong sense of community and the lovely garden atmosphere contribute to a highly desirable neighborhood in Claremont.

Submitted by Bryna Herbold and Joyce Landrey
2003

an island of plantings at the intersection of Via la Selva and Via Zurita. Originally, the street opened onto Foothill with plans for commercial buildings. After the construction of the Pomona Federal Savings Bank, a wall was constructed, closing off the Foothill access to auto traffic.

The houses on Via Zurita were built between 1926 and 1962. The architects for some are unknown but many were designed by notable architects such as Peter Ficker, Thorne and Ficker, Millard Sheets, Everett Tozier, John Longenecker, and Theodore Criley. One house, dating to 1950, was remodeled in the 1960's by Fred McDowell and Millard Sheets. Hartman and Baldwin also remodeled a house in the 1990's. The houses are of diverse styles, from "Spanish" to those with Japanese influence to mid-century modern.

The four oldest houses on Via Zurita, all "Spanish style," were built in the 1920's. Three of these were designed by Thorne and Ficker or Peter Ficker. One was built by C.C. Williams, Pomona representative of the Ready-Cut factory, using materials from his place of business.

From the beginning, there have been strong ties between Via Zurita and the colleges. The Claremont Realty Corporation first developed the subdivision as income producing property for Scripps College and several deeds to this day include first right of refusal clauses. Many early residents were college employees. The house at 1399 was built by José Pijoan from Barcelona, Spain, a professor of Hispanic Civilization at Pomona College, who brought Orozco here from Mexico to paint the Prometheus Mural at the college.

One house that is currently owned by Scripps was designed by Scripps art professor Millard Sheets for Scripps dance professor Beatrice Richardson. Another house was designed by Sheets for Jack Dunbar, the first chairman of the English Department at Claremont McKenna College.

There are other college connections. The house at 1495 is usually referred to as the "Blanchard House" although it was actually built in 1928 for Pomona College professor of music Joseph Clokey. It has a large living room that was used for chamber music concerts. William "Doc" Blanchard, also a Pomona College music professor, as well as the college organist, bought the house in 1940 and at some point had an organ installed in it.

The house at 1356 was originally built for Hartley Burr Alexander, an early Scripps College professor. Correspondence from his grandson can be found in the appendix. Later, Pitzer College's first president, John Atherton, lived at this address.

The house at 1430 was built in 1952 for Limon Benson, a professor of botany at Pomona College. Its unique features include a custom-built security system and a passageway from a

FACTS ABOUT VIA ZURITA RESIDENCES, as of early 2003

1330

* built in 1950 by architect Millard Sheets
* original owners Jack and Ginny Dunbar (he !st chair of CMC English Dept.)
* later owners include Phil Johnson and wife
* current owners (since 1984) Carl and Bryna Herbold
* very modern when first built (featured at some point in Sunset magazine)
* house has lots of glass, interesting angles, some lithichrome (tinted cement) floors, flat roof
* large stained glass piece in dining room by Mike Hill (did stained glass at old Ontario Airport terminal)

1342

* designed in 1956 by Joe Rognstad and built by Jack Sorensen
* lot was purchased for $35.00
* built on land designated as an alley on the original College Park plan
* original owners Knox and Jolly Mellon (he currently California State Preservation Officer); an e-mail from Mr. Mellon to Ms. Landrey is in the appendix
* current residents (since 1973) Dr. William and Joyce Landrey
* modern architecture with a lot of glass and Japanese details (shoji screens and built-ins)
* some renovation by Hartman and Baldwin, a Claremont firm
* stained glass panels made by current owner, Joyce Landrey

1343

* built in 1952 by architect Everett Tozier
* original owner unknown
* was once featured in Sunset magazine
* later owners Mr. and Mrs. Robert Barrett (was once on AAUW house tour)
* was later (to 2001) owned by Caroline Hall, once wife of Fred Warner Neal
* current owner is Barbara A Barton
* modern architecture with a lot of Japanese influence (wood construction, shoji panels, view of garden from each room, open floor plan, built in benches)

1356

* built in 1940 or 41 by unknown architect
* original owner was Nelly G. Alexander, widow of Hartley Burr Alexander, the founding professor of the Scripps College Humanities program; she lived there until her death in 1943 and was a friend of Millard Sheets and did artwork in his style. Correspondence between her grandson, Harley Wm. Alexander, and the Howland family, ccurrent owners, can be found in the appendix.

* later residents John and Ginny Atherton (he the president of Pitzer College) and Courtney and Barbara Peterson (a separate entrance was created for their psychotherapy practice
* lots of stained glass in the living and dining rooms, done by a client of the Petersens
* current owners John and Naomi Howland - latest addition to house in 1986

1376

* built in 1946 by an unknown architect
* current owner Brooke Granger Martin

1377

* built in 1956 by an unknown architect
* once owned by Alan and Kathleen Wicker, later by Betsy Creighton
* current owner is Althea Sachs

1382

* built in 1955 by unknown architect
* was once owned by Patty and Mike Myers - one of the additions was done by her father, Mr. Laucher
* current owners Bill Daub and Dr. Sandra Hollenberg
* several architectural changes, all done by Fred Mc Dowell, starting in 1988
* partial second floor added about 1992

1390

* built in 1950 by unknown architect
* original owers Carl and Joy Lippold
* remodeled in 1960s by Fred Mc Dowell and Millard Sheets; Sheets added a wet bar, built in buffet and redwood ceiling in dining room
* owner from 1963 - 1972 was a college professor whose wife created an Ikebana garden in the rear (some elements remain)
* owners from 1988 - 2000 were Marjorie Seapy, former Claremont postmistress, and Penny Ann Fox
* current owners Kate Massey and Edwin Rocklin

1399

* designed in 1926 by architects Thorne and Ficker for Prof. Jose Pijoan
* later residents were Judge James Whyte, Millard Sheets
* current residents, since 1967, Neil and Isabel Thomas
* L-shaped "Spanish California" house of white stucco and red tile roof
* veranda with a tile roof and rustic support posts
* original front door reconstructed by Hal Harter in the 1990s

1404

* built in 1949
* architect and original owner unknown
* owned for many years by the Hewitt family
* current residents Hugh and Zsuzsu Avery

1405

* built in 1950
* Scripps College maintains the first right of refusal
* original owners Mr. and Mrs. Stanley Wilson
* later owners Morris and Lula May Scholenberger
* current owners Tony and Pam Condon

1408

* built in 1951 by architect Theodore Criley JR
* original owner unknown
* extended in 1956 and again in 1989
* there is a round window, about 4 feet in diameter, in a hallway that connects the original house with one of the additions
* later owners Dr. and Mrs. Hilliard, Prof. and Mrs. Ness, Ken and Helen Wood (1989 - 2001)
* current owners Marta Romero and Richard Markwood

1414

* built in 1950 by ~~unknown architect~~ THEODORE CRILEY JR
* original owner Kathy Mc Nassor (still the owner but not the resident)
* Peter Drucker lived in the house at one point ?

1415

* built in 1926
* original owner and builder C.C. Williams of Pacific Ready-Cut Co. in Pomona
* later owners Guise family, Angelica Charro
* current owners Gene and Susan Zettle

* stucco "Spanish colonial" house with unusual red roof tiles imported from Holland
* oak floors
* terrace in the rear amd small walled-in patio in front
* a room above the garage as well as other reconfigurations (new master bedroom and bathroom, raised ceiling in living room) done from 1985-95
* was on a Claremont Heritage home tour in the 1990s
* was on a Claremont High School home tour in 2002

1430

* built in 1951 by an unknown architect
* original owner was Limon Benson, professor of Botany at Pomona College
* original features iclude a home designed and built security system and a pass-through from a bedroom to the basement "potting shed"
* was owned by realtor Cathy Curtis in the 1980's
* owners since 1990 are Don Rea and Julie Donahue

1433

* built in 1961 by unknown architect
* current owners are Eddie and Mu Dyke

1440

* built in 1951 by architect/builder John Longenecker
* actually on Via Los Altos but has a Via Zurita postal address
* house is of concrete block and brick
* a large back garden has many pine trees; some were destroyed in a fire
* original owner and current resident is Martha Palmer Fuller whose great uncle, Henry Austin Palmer, was a 19th c. Pomona land owner and active citizen

1444

* date of construction and architect unknown
* was moved from 480 No. Indian Hill in 1981 to Claremont United Methodist Church
* is owned by the church after being donated by Dr. Russ Martin
* it has housed over 100 refugees and ministers over the years and is called "Our House" by the church community
* faces the Round Building of the church but the garage is accessed on Via Los Altos although it has a Via Zurita postal address

1449

* built in 1949 by architect Millard Sheets for Scripps dance prof, Beatrice Richardson who owned the house until her death; it was willed to Scripps College, the current owner

1461

* built in 1962
* architect and original owner unknown
* is currently owned by Jeanne Garland

1475

* built in 1926 by architects Thorne and Ficker for James M. and Eunice Judy (Mr. Judy was the vice-president of Vortox Mfg. and active in Padua Players
* other owners were the Pilkington family and Perkins family
* owned until 1986 by Dr. Hobbitt of Newport Beach
* current owner is Amy Bogen, an avid gardener who makes good use of the land north of her house
* an L shaped, one story "Spanish colonial" house with a red tile roof, a long veranda across the front, French doors that open to the veranda, an open beam ceiling, floors of stamped cement.
* some renovations in 2002

1495

* built in 1928 by architect Peter Ficker and builder Clarence Stover for Pomona College music professor Joseph Clokey and wife
* oversized living room built for chamber music concerts
* purchased by Pomona College music prof. and organist William "Doc" Blanchard and wife Mary in 1940
* a concert sized pipe organ was installed in 1940 and was later willed to the Vivian Webb chapel (there are only 4 authorized players)
* Blanchard was also active in the Congregational Church and the Claremont Voluntary Fire Department
* Mary Blanchard and her daughter still visit every Christmas
* style is "Spanish Colonial Revival" built on three levels of concrete brick
* has red clay roof tiles, beamed cathedral ceilings, casement windows, wrought iron light fixtures, cement floors.
* has a small basement; permit was taken out on 10/7/49
* later owners were Ron and Amy Mittino
* current owner is Gary Lowe

R. C. FRAMPTON, CLAREMONT

Claremont City Council

Agenda Report

File #: 6170 **Item No:** 9.

TO: ADAM PIRRIE, CITY MANAGER

FROM: MICHAEL CISZEK, POLICE CHIEF

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

ADOPTION OF A RESOLUTION APPROVING PARTICIPATION IN THE 2026-27 DEPARTMENT OF ALCOHOLIC BEVERAGE CONTROL - OFFICE OF TRAFFIC SAFETY GRANT PROGRAM (FUNDING SOURCE: ABC-OTS GRANT)

SUMMARY

The California Department of Alcoholic Beverage Control (ABC), funded by the California Office of Traffic Safety (OTS) through the National Highway Traffic Safety Administration (NHTSA), administers the ABC-OTS Grant Program to support local law enforcement agencies in conducting alcohol-related education and enforcement operations.

The Claremont Police Department submitted a Letter of Interest and supporting materials for participation in the 2026-27 ABC-OTS Grant Program. Following ABC's review, the Police Department was selected to receive $25,000 in grant funding.

The grant will support enforcement activities through the Minor Decoy Program, Shoulder Tap Program, IMPACT Program, and Holiday Enforcement. ABC requires participating agencies to designate a sworn operations officer to attend a mandatory one-day training in Sacramento regarding program operations and grant reporting requirements.

As a condition of participation, ABC requires the adoption of a Resolution (Attachment) by the City's governing body. Staff recommends that the City Council adopt the attached resolution approving the City's participation in the 2026-27 ABC-OTS Grant Program and authorize the City Manager, or designee, to execute the grant agreement and related documents.

RECOMMENDATION

Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, APPROVING PARTICIPATION IN THE 2026-27 DEPARTMENT OF

ALCOHOLIC BEVERAGE CONTROL - OFFICE OF TRAFFIC SAFETY (ABC-OTS) GRANT PROGRAM.

ALTERNATIVES TO RECOMMENDATION

In addition to the staff recommendation, there are the following alternatives:

A. Request additional information.
B. Decline to participate in the 2026-27 ABC-OTS Grant Program.

FINANCIAL REVIEW

The Police Department has been awarded $25,000 through the ABC-OTS Grant Program. Grant funds will reimburse eligible costs associated with approved grant activities, primarily personnel overtime and allowable grant-related expenses. The grant does not require a local funding match.

The Department's grant budget is based on overtime staffing for sworn personnel assigned to approved ABC-OTS operations, together with allowable payroll costs and required grant-related training expenses. Actual expenditures will be limited to eligible costs authorized by the final grant agreement and will not exceed the $25,000 award.

Eligible expenditures will be submitted to ABC for reimbursement in accordance with the grant agreement and applicable reimbursement procedures. Any costs incurred outside the grant's authorized scope or reimbursement requirements would remain the responsibility of the City.

ANALYSIS

The ABC-OTS Grant Program is intended to assist local law enforcement agencies with alcohol-related enforcement and education. The Claremont Police Department's award will provide additional resources for proactive operations focused on reducing underage access to alcohol, addressing adults who furnish alcohol to minors, promoting compliance at ABC-licensed establishments, and conducting targeted enforcement during designated holiday periods.

As part of its application, the Police Department identified the Minor Decoy, Shoulder Tap, IMPACT, and Holiday Enforcement programs as the primary grant-funded activities. These operations are intended to prevent the sale and furnishing of alcoholic beverages to minors, educate and promote compliance among ABC-licensed establishments, identify alcohol-related violations, and provide targeted enforcement during periods of increased alcohol-related activity.

Grant-funded activities are anticipated to include the following:

- Minor Decoy Program - supervised operations using underage decoys to determine whether ABC-licensed establishments sell alcoholic beverages to minors.
- Shoulder Tap Program - operations targeting adults who purchase or furnish alcoholic beverages to minors outside licensed retail locations.
- IMPACT Program - inspections and education at ABC-licensed establishments to identify violations, provide licensees an opportunity to correct deficiencies, and conduct follow-up inspections.
- Holiday Enforcement - targeted undercover and high-profile enforcement addressing underage drinking, sales or furnishing of alcohol to minors, service to obviously intoxicated persons, and

other alcohol-related violations during designated holiday periods.

ABC has advised that grant operations may begin after the designated operations officer completes the mandatory one-day training in Sacramento. The training will provide instruction regarding ABC's expectations for conducting grant-funded operations and completing required grant documentation. ABC will provide separate fiscal training on reimbursement claims.

Participation in the grant will supplement the Police Department's existing alcohol enforcement efforts and provide dedicated funding for proactive operations that otherwise would compete with general Police Department resources. Staff believes the grant will enhance the Department's ability to address alcohol-related violations and promote responsible alcohol sales and service within the community.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated this agenda item in relation to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, General Plan, Youth and Family Master Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Michael Ciszek
Police Chief

Prepared by:

Eddie Lomeli
Police Sergeant

Attachment:
ABC-OTS Resolution

RESOLUTION NO. 2026-

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, APPROVING PARTICIPATION IN THE STATE OF CALIFORNIA ALCOHOL BEVERAGE CONTROL – OFFICE OF TRAFFIC SAFETY (ABC-OTS) GRANT PROGRAM

WHEREAS, the City of Claremont Police Department (herein referred to as grant recipient) desires to undertake a certain project designated as the Alcoholic Beverage Control (ABC) Office of Traffic Safety (OTS) Grant Program to be funded from funds made available through the ABC-OTS Grant Program administered by the Office of Traffic Safety (OTS) and National Highway Traffic Safety Administration (NHTSA).

NOW THEREFORE, THE CLAREMONT CITY COUNCIL DOES HEREBY RESOLVE:

SECTION 1. That the City Manager of the City of Claremont, or his designee, is authorized, on behalf of the City Council, to submit the proposal to ABC-OTS; and is further authorized to execute on its behalf the contract, including any extensions or amendments thereof, and any subsequent contract with the State in relation thereto.

SECTION 2. That it is agreed that any liability arising out of the performance of this contract, including civil court actions for damages, shall be the responsibility of the grant recipient. The State of California and ABC disclaim responsibility for any such liability.

SECTION 3. That it be further resolved that grant funds received hereunder shall not be used to supplant expenditures controlled by this body, except as authorized by the grant award.

SECTION 4. That it is also agreed that this award is not subject to local hiring freezes.

SECTION 5. That the Mayor shall sign this resolution and the City Clerk shall attest and certify to the passage and adoption thereof.

PASSED, APPROVED, AND ADOPTED this 27th day of October, 2026.

_____
Mayor, City of Claremont

ATTEST:

_____
City Clerk, City of Claremont

APPROVED AS TO FORM:

_____
City Attorney, City of Claremont

Claremont City Council

Agenda Report

File #: 6209 **Item No:** 10.

TO: ADAM PIRRIE, CITY MANAGER

FROM: KATIE WAND, ACTING ASSISTANT CITY MANAGER

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

ADOPTION OF A RESOLUTION AFFIRMING THE APPOINTMENT OF AN INTERIM COMMUNITY DEVELOPMENT DIRECTOR (FUNDING SOURCE: GENERAL FUND)

SUMMARY

The Community Development Director position is currently vacant and a recruitment for a permanent Community Development Director is underway. Assuming a successful recruitment and hiring timeline, a permanent Director could begin as early as January 2027.

To assist with day-to-day operations and ensure continuity of leadership within the Community Development Department, the City Manager has appointed David Crabtree, a CalPERS retiree, to serve as the Interim Community Development Director. To comply with CalPERS regulations, this appointment requires approval by the City Council.

RECOMMENDATION

Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA AFFIRMING THE INTERIM APPOINTMENT OF "RETIRED ANNUITANT" DAVID CRABTREE AS INTERIM COMMUNITY DEVELOPMENT DIRECTOR.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request additional information from staff.

FINANCIAL REVIEW

The fully-burdened hourly rate of compensation during Mr. Crabtree's appointment is $113.59 (base

rate $110.87) and State law (Gov. Code § 21221(h)) caps his employment at 960 hours per fiscal year, a total cost of $109,046 per fiscal year if Mr. Crabtree works the full allotment of 960 hours.

Mr. Crabtree will not receive any other benefit, incentive, compensation in lieu of benefit or other form of compensation.

Government Code Sections 21221(h) and 7522.56 limit retired annuitant hours to 960 hours in a fiscal year for all retired annuitant positions with any CalPERS employers, unless an exception applies. Government Code Section 20220 also requires the enrollment of a retired annuitant with CalPERS solely for recordkeeping purposes and the reporting of retired annuitant's hours within 30 days of the end of a pay period.

The staff cost to prepare this report and resolution is estimated at $320 and is included in the operating budget of the Administrative Services Department.

ANALYSIS

The City is currently recruiting for a permanent Community Development Director. Government Code Section 21221(h) allows the City to appoint a CalPERS retiree to a vacant position as a retired annuitant during that recruitment, with approval by the governing body (City Council) in a public meeting.

Because the position requires specialized skills, the City needs a seasoned community development management professional to assist with the day-to-day operations of the Community Development Department in the interim. This includes personnel management and oversight of planning, engineering, building, and code enforcement services.

Mr. Crabtree is well qualified to fill this need. He has more than 38 years of experience providing municipal development management services to seven California agencies. Since retiring from CalPERS-covered employment in 2019, he has provided consulting services to the cities of Buena Park, La Habra, Fountain Valley, Laguna Beach, El Monte, La Habra Heights, and South Gate. His knowledge of municipal community development would benefit the City of Claremont and provide continuity of internal and external operations.

LEGAL REVIEW

The proposed resolution has been reviewed and approved as to form by the City Attorney.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Economic Sustainability Plan, General Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Katie Wand
Acting Assistant City Manager

Prepared by:

Christi Giannone
Human Resources Manager

Attachment:
Resolution

RESOLUTION NO. 2026-

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA AFFIRMING THE INTERIM APPOINTMENT OF "RETIRED ANNUITANT" DAVID CRABTREE AS INTERIM COMMUNITY DEVELOPMENT DIRECTOR

WHEREAS, Government Code Section 21221(h) addresses the temporary employment of retirees in accordance with the Public Employees' Retirement Law, as administered by the California Public Employees' Retirement System (CalPERS), and permits the City Council to appoint a retired annuitant to a vacant position requiring specialized skills during recruitment for a regular appointment, and provides that such appointment will not subject the retired person to reinstatement from retirement or loss of benefits so long as it is a single appointment that does not exceed 960 hours in a fiscal year; and

WHEREAS, the position of Community Development Director for the City of Claremont is vacant; and

WHEREAS, during the recruitment and selection process for a permanent Community Development Director, the City Council desires to appoint retired annuitant David Crabtree to serve as Interim Community Development Director for the City of Claremont pursuant to Government Code Section 21221(h), to provide the leadership, managerial, and organizational skills necessary to ensure the effective and efficient operation of the Community Development Department; and

WHEREAS, David Crabtree has over thirty-eight years of public sector management experience in a number of Southern California public agencies, retired from the City of Brea in the position of Community Development Director effective December2019, and has the necessary skills and qualifications to manage the City of Claremont's Community Development Department; and

WHEREAS, an appointment under Government Code section 21221(h) requires an active, publicly posted recruitment for a permanent replacement; and

WHEREAS, the current status of this recruitment is open; and

WHEREAS, this Government Code Section 21221(h) appointment shall only be made once and therefore will end on the date immediately preceding the date on which the regular appointment to the vacant position of Community Development Director for the City commences his or her employment or, if earlier, the date that this appointment is terminated by the City or David Crabtree pursuant to the terms of an employment agreement; and

WHEREAS, it is understood by the City and David Crabtree that the combined total hours to be served by David Crabtree in any fiscal year, for all positions and for all CalPERS employers combined, shall not exceed the 960-hour limitation set forth in California Government Code Section 21221(h) and Section 7522.56(d); and

WHEREAS, the compensation paid to retirees cannot be less than the minimum nor exceed the maximum monthly base salary paid to other employees performing comparable duties divided by 173.333 to equal the hourly rate; and

WHEREAS, the maximum base salary for this position is $18,256.59 and the hourly equivalent is $110.87, and the minimum base salary for this position is $15,111.46 and the hourly equivalent is $91.77; and

WHEREAS, the hourly base rate paid to David Crabtree will be $110.87; and

WHEREAS, David Crabtree has not and will not receive any other benefit, incentive, compensation in lieu of benefit or other form of compensation in addition to this hourly pay rate; and

WHEREAS, the City Council hereby affirms the appointment of David Crabtree as an interim appointment retired annuitant to the vacant position of Community Development Director for the City of Claremont under Government Code Section 21221(h).

NOW THEREFORE, BE IT RESOLVED THAT the City Council hereby certifies that the appointment of retired annuitant David Crabtree, as described herein, is necessary to fill the critically needed vacant position of Community Development Director, which requires specialized skills and expertise, effective October 5, 2026, to ensure the continued effective operation and oversight of the Community Development Department during the recruitment and selection process for a permanent Community Development Director.

PASSED, APPROVED AND ADOPTED this 27th day of October 2026.

_____
Mayor, City of Claremont

ATTEST:

_____
City Clerk, City of Claremont

APPROVED AS TO FORM:

_____
City Attorney, City of Claremont

Claremont City Council

Agenda Report

File #: 6199 **Item No:** 11.

TO: ADAM PIRRIE, CITY MANAGER

FROM: DAVID CRABTREE, INTERIM COMMUNITY DEVELOPMENT DIRECTOR

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

INTRODUCTION OF AN ORDINANCE AMENDING CHAPTER 16.110 (SHORT-TERM RENTALS) OF THE CLAREMONT MUNICIPAL CODE PERTAINING TO HOMESHARING ELIGIBILITY, PERMIT SCOPE, AND SHORT-TERM RENTAL FACILITATOR REPORTING (FUNDING SOURCE: GENERAL FUND)

SUMMARY

On May 13, 2025, the City Council adopted Ordinance No. 2025-04, adding Chapter 16.110 (Short-Term Rentals) to the Claremont Municipal Code (CMC) and establishing a one-year pilot program to regulate short-term rentals (STRs). The pilot program permitted only hosted homesharing rentals and capped the number of STR Permits at twenty per STR Zone, for a citywide maximum of one hundred permits. The ordinance took effect on June 12, 2025.

On June 23, 2026, staff presented the City Council with a one-year program evaluation required by CMC Section 16.110.140. Following that discussion, the City Council directed staff to prepare amendments to Chapter 16.110 to: (1) extend homesharing eligibility to qualifying primary-resident tenants with written landlord consent; (2) clarify the scope of what an STR Permit authorizes, including multi-room homesharing and eligible accessory structures on the same parcel; and (3) invoke Senate Bill 346 to authorize STR facilitator reporting and strengthen enforcement.

On September 15, 2026, the Planning Commission held a public hearing on the proposed code amendment and voted 6-0-1 (Commissioner Callaway absent) to recommend that the City Council adopt the proposed Ordinance.

RECOMMENDATION

Staff recommends the City Council:

A. Introduce for first reading, and that reading be by title only AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, AMENDING CHAPTER 16.110

("SHORT-TERM RENTALS") OF THE CLAREMONT MUNICIPAL CODE TO EXTEND HOMESHARING ELIGIBILITY TO QUALIFYING TENANTS, CLARIFY THE SCOPE OF SHORT-TERM RENTAL PERMITS, INCORPORATE SHORT-TERM RENTAL FACILITATOR REPORTING REQUIREMENTS UNDER SENATE BILL 346, AND MAKE RELATED CLARIFYING AMENDMENTS; and

B. Find this item is exempt from environmental review under the California Environmental Quality Act (CEQA).

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request changes to the proposed ordinance. Per CMC Section 16.315.090(B), "The City Council shall not make any change or addition to the proposed amendment or Ordinance which has not been previously considered by the Planning Commission during its hearing until the proposed change or addition has been referred to the Planning Commission for a report." Approving changes that the Planning Commission considered but did not recommend generally requires a supermajority (4/5) vote of the City Council.

FINANCIAL REVIEW

During the first year of the pilot program, the STR Program generated $29,355 in Transient Occupancy Tax (TOT) and $15,215 in STR Permit fees, for a total of $44,570 in revenue.

The City uses Rentalscape, a compliance consultant and software program, to identify STRs, track usage, provide an online portal for permits and TOT payments, and operate a 24/7 bilingual hotline. The cost of these services is approximately $14,000 per year. The staff cost to manage the program is estimated at $12,600 and is included in the operating budget of the Community Development Department. Total annual program expenses of approximately $26,600 are covered by TOT and permit fee revenue.

The proposed amendments are not anticipated to result in a significant change to program costs or revenues. Extending eligibility to qualifying tenants may modestly increase permit applications, and facilitator reporting under Senate Bill 346 is expected to improve the City's ability to verify TOT remittance.

The staff cost to prepare this report and administer this program is estimated at $1,500 and is included in the operating budget of the Community Development Department.

ANALYSIS

Background

The City of Claremont maintained a long-standing prohibition on residential rentals of fewer than thirty consecutive days. In April 2019, the Future Financial Opportunities Committee (FFOC) recommended that the City Council consider regulating STRs to enhance transparency and accountability and to generate revenue to offset enforcement costs. Staff presented an overview of STR regulations to the City Council in October 2019 and proposed regulations in March 2020, but the ordinance development was delayed due to the pandemic.

In May 2024, the City Council reaffirmed STR regulation as a priority. The City conducted a community survey in August 2024, and the Planning Commission reviewed key regulatory decisions in September 2024 and a draft ordinance in November 2024. On February 4, 2025, the Planning Commission held a public hearing and recommended adoption of an ordinance regulating all STR types.

On April 22, 2025, the City Council held a public hearing and received 245 written public comments and extensive public testimony. The City Council voted 4-1 to introduce a revised ordinance that allowed only hosted homesharing rentals, capped permits at twenty per STR Zone (100 citywide), and structured the program as a one-year pilot. The City Council adopted Ordinance No. 2025-04 on May 13, 2025, and it took effect on June 12, 2025.

Pilot Program Evaluation

On June 23, 2026, staff presented the one-year evaluation required by CMC Section 16.110.140. The table below summarizes program activity through June 18, 2026.

Metric	Result
STR Permits Issued	16 of 100 citywide cap
Permits by STR Zone	Zone 1: 2; Zone 2: 1; Zone 3: 6; Zone 4: 2; Zone 5: 5
Permit Applications Denied	2
Hotline and Complaint Calls Received	8
Notices of Violation Issued	51
Administrative Citations Issued	30
Unpermitted Listings Removed	48

Notices of Violation were the primary enforcement tool and, in most cases, led to voluntary removal of unpermitted listings within about one week. However, staff lacked legal authority to compel hosting platforms to disclose information about hosts or properties.

The June report presented four policy discussion items. The City Council directed staff to prepare amendments for the first three: tenant eligibility, permit scope, and Senate Bill 346 facilitatory reporting. The City Council did not direct staff to pursue the fourth item, a limited unhosted rental category for primary residents who are temporarily absent; all unhosted rentals remain prohibited under the proposed ordinance.

Proposed Ordinance

The proposed ordinance (Attachment A) amends Chapter 16.110, with additions shown in underline and deletions shown in strikethrough. The key changes are summarized below.

Homesharing by Qualifying Tenants (new Section 16.110.045). A qualifying tenant may apply for and hold an STR Permit for a homesharing rental. A qualifying tenant is a natural person who occupies the dwelling unit as their primary residence under a written lease, is not in default under that lease, and has obtained written landlord consent. Primary residence means at least nine months of occupancy, documented by at least two of the following: a lease, vehicle registration, voter registration, utility bill, or government-issued identification.

- The landlord consent must be signed by both parties on a City-approved form, identify the unit and any eligible accessory structures, acknowledge the landlord has reviewed Chapter 16.110, and state that consent may be revoked in writing at any time.
- The permit automatically terminates if consent is revoked or the tenancy ends, and the tenant must notify the City within seven days.
- All obligations and penalties that apply to an owner apply equally to a qualifying tenant. The permit may not be subleased, assigned, or transferred.
- Tenant-held permits count toward the existing STR Zone cap of twenty permits per zone, and the one-permit-per-person limit continues to apply.

Scope of the Homesharing Permit (Sections 16.110.030 and 16.110.040). The homesharing rental definition and permit requirement are revised to state that a permit authorizes a host to rent one or more bedrooms of the host's primary residence and/or one or more eligible accessory structures on the same legal parcel, such as an eligible accessory dwelling unit (ADU) or a permitted detached habitable structure like a guest house. The host must maintain and reside in at least one bedroom throughout each guest's stay. This resolves questions raised during the pilot year about multi-room rentals and detached structures. Existing prohibitions on STR use of State-mandated ADUs under Government Code Section 66323(e), junior ADUs, and units funded through the City's ADU Grant Program remain unchanged.

New "Host" Definition and Terminology. A new definition of "Host" means the owner or qualifying tenant who holds the permit and resides in at least one bedroom throughout the guest's stay. References to "Owner" are changed to "Host," so obligations apply consistently to owner-hosts and tenant-hosts. New definitions are also added for "Applicant," "Landlord Consent," "Qualifying Tenant," "Qualifying Tenant's Primary Residence," and "Short-Term Rental Facilitator." The obsolete definition of "Homeshare Interest" is deleted.

Short-Term Rental Facilitator Reporting (new Section 16.110.150). This section invokes California Government Code Chapter 4.6 (commencing with Section 50990) and authorizes the Enforcement Official to require facilitators to report the physical address of each STR in the City for which the facilitator processes a reservation or collects payment. Facilitators that fail to report may be subject to administrative fines. This section also prohibits facilitators from interfering with direct communication between a host and guest.

Dedicated Appeals Procedure (new Section 16.110.085). A permit denial, suspension, or revocation may be appealed to the Director within ten calendar days. The Director's decision may be appealed to the Planning Commission, and the Planning Commission's decision to the City Council, each within ten calendar days. Each level of review is de novo, and the City Council's decision is final. This replaces the cross-reference to Chapter 16.321, which is not well suited to permit-level enforcement decisions.

Removal of the Pilot Program Provision (Section 16.110.140). The pilot program section is deleted because the required one-year re-evaluation occurred on June 23, 2026. The program would continue as an ongoing regulatory program. Section 16.110.020(C) continues to reserve the City's right to amend the regulations or discontinue issuing permits at any time.

Administrative Streamlining (Section 16.110.090(L)). The requirement that a host file a summary or abstract of each rental contract with the City before each occupancy is deleted. This requirement was a holdover from the original draft ordinance, which allowed unhosted vacation rentals, and staff

has found it unnecessary for hosted stays. Hosts must still enter into a contract with a responsible person for each stay, collect guest and vehicle information, and retain contracts for four years.

Related Clarifying Amendments. The Agency (Section 16.110.070) and Application Requirements (Section 16.110.080) sections are revised to apply to qualifying tenants, and applicants who are tenants must submit their lease and landlord consent. The "Local contact person" definition is revised to include the host.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Economic Sustainability Plan, and the 2026-28 Budget.

CEQA REVIEW

It can be seen with certainty that the Code Amendment has no possibility of having a significant effect on the environment. Therefore, the adoption of this Ordinance is not a project subject to the California Environmental Quality Act (CEQA) pursuant to Section 15061(b)(3) of Title 14 of the California Code of Regulations.

COMMISSION REVIEW

On September 15, 2026, the Planning Commission held a duly noticed public hearing on the proposed amendments. The Planning Commission voted 6-0-1 (Commissioner Callaway was absent) to adopt Planning Commission Resolution No. 2026-11, recommending that the City Council approve the amendments to Chapter 16.110.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:	Prepared by:
David Crabtree	Alex Cousins
Interim Community Development Director	Senior Management Analyst

Attachments:
A - Proposed Short-Term Rentals Ordinance
B - Planning Commission 9/15/26 Meeting Minutes

ORDINANCE NO. 2026-

AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, AMENDING CHAPTER 16.110 ("SHORT-TERM RENTALS") OF THE CLAREMONT MUNICIPAL CODE TO EXTEND HOMESHARING ELIGIBILITY TO QUALIFYING TENANTS, CLARIFY THE SCOPE OF SHORT-TERM RENTAL PERMITS, INCORPORATE SHORT-TERM RENTAL FACILITATOR REPORTING REQUIREMENTS UNDER SENATE BILL 346, AND MAKE RELATED CLARIFYING AMENDMENTS

WHEREAS, in recent years, technology and innovation have expanded the use of short-term rentals (stays of less than 30 consecutive days) as a form of temporary lodging to allow visitors to stay in and experience a local community;

WHEREAS, regulating short-term rentals is necessary to mitigate the risk of converting residential units into predominantly transient accommodations, which could negatively affect the local housing stock;

WHEREAS, the City is committed to protecting the character, tranquility, and livability of its residential neighborhoods;

WHEREAS, the regulation of short-term rentals seeks to ensure that such uses do not adversely impact surrounding properties or create nuisances in residential areas;

WHEREAS, ensuring that short-term rentals meet fire, building, and health codes is essential to protect the safety and welfare of both visitors and the community;

WHEREAS, short-term rentals can contribute to the local economy by supporting tourism, generating transient occupancy tax revenue, and providing property owners with supplemental income;

WHEREAS, the City recognizes the importance of effective enforcement mechanisms to ensure compliance with short-term rental regulations and to address violations promptly;

WHEREAS, this ordinance aligns with state and local policies aimed at addressing housing needs, promoting sustainable land use, and preserving quality of life for residents;

WHEREAS, on May 13, 2025, the City Council adopted Ordinance No. 2025-04, adding Chapter 16.110 to the Claremont Municipal Code and establishing a one-year pilot program regulating short-term rentals, which permits only hosted homesharing rentals, prohibits all other short-term rental types, and caps the program at twenty Short-Term Rental Permits per STR Zone, for a citywide total of 100 permits; the ordinance took effect on June 12, 2025;

WHEREAS, Section 16.110.140 of the Claremont Municipal Code requires the City Council to re-evaluate the short-term rental pilot program after one year of its effective date;

WHEREAS, on June 23, 2026, staff presented the City Council with a report on the pilot program's first year of performance, enforcement outcomes, and permit and revenue activity, along with policy discussion items regarding potential amendments to Chapter 16.110;

WHEREAS, based on that report and the City Council's discussion, the City Council directed staff to prepare amendments to Chapter 16.110 to: (1) extend homesharing eligibility to qualifying primary-resident tenants with written landlord consent; (2) codify the scope of what a Short-Term Rental Permit authorizes, including multi-room homesharing and the use of eligible accessory structures on the same parcel; and (3) incorporate provisions invoking California Senate Bill 346 to authorize short-term rental facilitator reporting and strengthen enforcement;

WHEREAS, Senate Bill 346 (Chapter 751, Statutes of 2025), codified at Government Code Section 50990 et seq. and effective January 1, 2026, authorizes a local agency that has adopted an ordinance invoking its provisions to require short-term rental facilitators to report specified property and reservation data, to require the display of permit numbers on listings, and to impose administrative fines for noncompliance;

WHEREAS, the City's staff used the City Council's direction to draft the Code Amendments set forth in Section 3 of this Ordinance ("Code Amendments");

WHEREAS, on September 15, 2026, the Planning Commission held a duly-noticed public hearing to consider the proposed Code Amendments, and after reviewing the staff report, staff presentation, and public testimony (both written and verbal), the Planning Commission voted with 6 ayes and 1 absence (Commissioner Callaway was absent) to recommend that the City Council adopt the proposed Code Amendments; and

WHEREAS, on October 27, 2026, the City Council held a duly-noticed public hearing to consider the proposed Code Amendments, and after reviewing the staff report, staff presentation, the Planning Commission's recommendation, and public testimony (both written and verbal), the City Council voted [VOTE] to approve this Ordinance;

THE CITY COUNCIL OF THE CITY OF CLAREMONT DOES ORDAIN AS FOLLOWS:

SECTION 1. Incorporation of Recitals. The City Council hereby finds that all the facts set forth in the recitals are true and correct and are incorporated as substantive findings of this ordinance.

SECTION 2. CEQA. It can be seen with certainty that the Code Amendment has no possibility of having a significant effect on the environment. The Code Amendment will not result in the construction of any new structures. Rather the Code Amendment authorizes a small number of existing structures to be used for limited short term rental use, which is similar to the residential use that is already permitted in those structures. Therefore, the adoption of this Ordinance is not a project subject to the California Environmental Quality Act (CEQA) pursuant to Section 15061(b)(3) of Title 14 of the California Code of Regulations.

SECTION 3. Code Amendment. Based upon substantial evidence presented to the Planning Commission and City Council, including evidence presented to the Planning Commission at the public hearing on September 15, 2026, and evidence presented to the City Council at the public hearing on October 27, 2026, including written staff reports, staff presentations, written public comments, and verbal testimony, the City Council hereby adopts and approves the proposed Code Amendment as set forth:

Chapter 16.110, of the Claremont Municipal Code is hereby amended as set forth below (additions underlined; deletions struck):

Chapter 16.110 Short-Term Rentals

16.110.010 Title.

This ordinance shall be known as the Short-Term Rentals Ordinance ("Ordinance"). This Ordinance shall be applicable in the City of Claremont, California, which shall be referred to herein as "City."

16.110.020 Purpose.

A. The purpose of this chapter is to regulate privately-owned residential dwellings within the City used as short-term rentals, ensure transient occupancy taxes (TOT) are paid and collected, and minimize the potential adverse effects of short-term rentals on surrounding residential neighborhoods.

B. This chapter is not intended to allow any residential property owner or authorized agent to violate any private conditions, covenants, and restrictions applicable to the owner's property that may prohibit the owner from using their property as a short-term rental, as defined by this chapter.

C. The City reserves the right to change the regulations provided in this chapter at any time, including discontinuing the issuance of Short-Term Rental Permits, notwithstanding any impacts to existing or future Short-Term Rental Permit holders. Anyone accepting a Short-Term Rental Permit pursuant to this chapter acknowledges and accepts that possibility.

16.110.030 Definitions.

As used in this chapter, the terms and phrases below shall have the meanings defined below.

Accessory Dwelling Unit shall have the same meaning as that term is defined in Chapter 16.333 (Accessory Dwelling Units).

Apartment shall have the same meaning as that term is defined in Section 16.900.110. As used in this chapter, the term "apartment" includes developments with three or more dwelling units under single ownership or management but excludes individually

owned units within a condominium development.

Applicant shall mean the property owner, or a qualifying tenant pursuant to Section 16.110.045 (Qualifying Tenants).

Bedroom shall mean a private room within a short-term rental furnished with a bed and intended primarily for sleeping which is 70 square feet or greater in size. A bedroom must consist of four walls to the ceiling, at least one of which is located along an exterior wall with a window and must be separated from other rooms by a door. The bedroom must be accessible to a bathroom without crossing into or through another bedroom.

Business entity shall mean a corporation, partnership, or other legal entity that is not a natural person or a personal or family trust. In addition, the following shall not be considered a "business entity" under this chapter: any partnership, limited liability partnership, or limited liability company consisting solely of natural persons, the number of whom does not exceed four.

Change of property ownership shall mean the transfer of title from one person to another.

Contract shall mean an agreement or evidence of any tenancy that allows or provides for the short-term rental of property.

Daytime occupancy shall mean the hours between 8:00 a.m. and 10:00 p.m.

Daytime occupants shall mean the guest(s) who may occupy a vacation rental during daytime occupancy.

Enforcement official shall mean the Community Development Director or one or more of the Community Development Director's respective designees.

Good cause for the purposes of denial, suspension, revocation, imposition of conditions, renewal, and reinstatement of a Short-Term Rental Permit shall means: (1) the applicant, owner, the owner's agent, or the local contact person has failed to comply with any of the terms, conditions, or provisions of this chapter or any relevant provision of this code, state law, or any rule or regulation promulgated thereunder; (2) the applicant, owner, owner's agent, or local contact person has failed to comply with any special conditions that were placed upon the Short-Term Rental Permit by the enforcement official; or (3) the short-term rental has been operated in a manner that adversely affects the public health or welfare or the safety of the immediate neighborhood in which the short-term rental is located.

Good neighbor brochure shall mean a document prepared by the enforcement official that summarizes general rules of conduct, consideration, and respect, including without limitation provisions of the Claremont Municipal Code applicable to or expected of guests to the city.

~~*Homeshare interest* shall mean a portion of an owner's home that is subject to homesharing as provided in this chapter.~~

Homesharing rental shall mean an activity whereby, for compensation, ~~the owner hosts guests in the owner's primary residence, an eligible accessory dwelling unit, or a permitted habitable structure that is detached from the owner's primary residence (such as a guest house) for periods of less than 30 consecutive days while the owner lives on-site in the home or in the accessory dwelling unit throughout the guest's stay.~~ a Host houses guests in one or more bedrooms of the host's primary residence and/or in one or more eligible accessory structures located on the same legal parcel as the host's primary residence, including an eligible accessory dwelling unit or a permitted habitable structure detached from the host's primary residence (such as a guest house), for periods of less than 30 consecutive days, provided the host maintains and resides in at least one bedroom throughout the guest's stay.

Host shall mean the owner or qualifying tenant who holds a Short-Term Rental Permit for a homesharing rental and who maintains and resides in at least one bedroom of the short-term rental throughout a guest's stay.

Hotline shall mean the telephonic service operated for the purpose of receiving complaints regarding the operation of any short-term rental and the forwarding of such complaints to the appropriate city enforcement official or, if applicable, the local contact person. For the purposes of this chapter, the term "hotline" also includes any contact in person or by telephone, email, and digital or electronic communication, or correspondence of any kind to and/or from any enforcement official.

Landlord Consent shall mean the signed, written authorization of a property owner permitting a qualifying tenant to apply for and operate a Short-Term Rental Permit for homesharing rental purposes on the owner's property, in a form approved by the enforcement official.

~~*Limited vacation rental* shall mean a vacation rental that is un-hosted and rented for no more than six non-contiguous periods of less than 30 days per calendar year.~~

Local contact person shall mean the owner, a local property manager, Host, or agent of the owner, who is available 24 hours per day, seven days per week for the purpose of responding in-person within 30 minutes to complaints regarding the condition, operation, or conduct of occupants of the short-term rental, or any agent of the owner authorized by the owner to take remedial action and who responds to any violation of this code.

Owner shall mean the natural person or persons who is/are the owner of record of the property. The term "owner" also includes a personal or family trust consisting solely of natural persons and the trustees of such trust or the members of any partnership, limited liability partnership, or limited liability company consisting solely of natural persons, the number of whom does not exceed four. The term "owner" does not include a business entity.

Owner's primary residence shall mean a residential property lived in by the owner for at least nine months, which is documented by at least two of the following: motor vehicle registration, voter registration, homeowner's exemption on their property taxes, utility bill, or tax documentation.

Property shall mean a residential, legal lot of record on which a short-term rental is located.

Qualifying tenant shall mean a natural person who: (a) occupies a dwelling unit as the qualifying tenant's primary residence pursuant to a written lease or rental agreement; (b) is not in default under the terms of that lease or rental agreement; and (c) has obtained landlord consent to operate a homesharing rental on the property in accordance with Section 16.110.045 (Qualifying Tenants).

Qualifying tenant's primary residence shall mean the dwelling unit lived in by a qualifying tenant for at least nine months pursuant to a written lease or rental agreement, which is documented by at least two of the following: a valid lease or rental agreement, motor vehicle registration, voter registration, utility bill, or government-issued identification listing the property address.

Rental term shall mean the period of time a responsible person rents or leases a short-term rental.

Responsible person shall mean an occupant of a short-term rental who is at least 21 years old and who shall be legally responsible for compliance of all occupants of the short-term rental and/or their guests with provisions of this chapter.

Single-family dwelling shall mean a residential unit designed and intended for occupancy by one household, which may be located in a standalone structure or within a development where each unit is independently owned. This includes detached homes and condominiums, whether detached or attached, but excludes multi-unit buildings containing more than two dwelling units under single property ownership or with shared access corridors.

Short-Term Rental Permit shall mean a permit, issued by the city to allow the use of a single-family dwelling as a short-term rental.

Short-term rental shall mean a privately-owned residential dwelling, or portion thereof, unless otherwise prohibited, that is offered or provided to a guest by an owner for less than 30 consecutive days. The term short-term rental includes vacation rentals, limited vacation rentals, and homesharing rentals; however, it shall not include hotels, motels, inns, or bed and breakfasts.

Short-term rental facilitator shall have the same meaning as set forth in Government Code Section 50990, as may be amended from time to time.

STR zone shall mean a City recognized zone or area within the City. The City Council may for the purpose of this chapter only, determine the boundaries of STR zones by resolution. The City Council by resolution may recognize, for purposes of this chapter only, a new STR zone.

STR zone cap shall mean the maximum number of Short-Term Rental Permits that the City can approve in each STR zone. The STR zone cap shall be twenty (20) Short-Term

Rental Permits per STR zone and shall be the same for all STR zones. The STR zone cap may be adjusted by the City Council by ordinance amending this chapter.

Vacation rental shall mean a single-family dwelling, or portion thereof, utilized for occupancy for dwelling, lodging, or sleeping purposes for a period of less than 30 consecutive days without the owner being present. An ongoing month-to-month tenancy granted to the same renter for the same unit for a period of 30 days or more is not a "vacation rental."

16.110.040 Short-Term Rental – Permit Required for Homesharing; All Other Short-Term Rentals Prohibited.

A. An owner or qualifying tenant must obtain a Short-Term Rental Permit for a homesharing rental. This Permit allows the owner or qualifying tenant to host guests in ~~their primary residence, their eligible accessory dwelling unit, or a permitted habitable structure that is detached from the owner's primary residence (such as a guest house)~~ one or more bedrooms of the host's primary residence and/or in one or more eligible accessory structures located on the same parcel as the host's primary residence, including an eligible accessory dwelling unit or a permitted habitable structure detached from the host's primary residence (such as a guest house)- for a period of less than 30 consecutive days, provided the ~~owner resides on-site site~~ host maintains and resides in at least one bedroom throughout the guest's stay. The holder of a Short-Term Rental Permit shall be responsible for complying with all requirements of this chapter.

B. All other short-term rentals, including vacation rentals and limited vacation rentals, are prohibited. In accordance with subdivision (e) of California Government Code Section 66323, as amended from time to time or replaced by a successor statute, short-term rentals are prohibited in accessory dwelling units that were approved as State-mandated ADUs pursuant to California Government Code Section 66323.

16.110.045 Qualifying Tenants.

A. A qualifying tenant may apply for and hold a Short-Term Rental Permit to operate a homesharing rental.

B. Prior to submitting an application for a Short-Term Rental Permit, a qualifying tenant shall obtain landlord consent, in a form approved by the enforcement official. At a minimum, the landlord consent shall: (1) be signed by the property owner and the qualifying tenant; (2) identify the dwelling unit and eligible accessory structure(s) authorized for homesharing rental use; (3) acknowledge that the landlord has reviewed the requirements of this chapter; and (4) state that the landlord consent may be revoked in writing by the property owner at any time.

C. Upon written revocation of landlord consent by the property owner, or upon termination of the qualifying tenant's tenancy for any reason, the Short-Term Rental Permit issued to the qualifying tenant shall automatically terminate, and the qualifying

tenant shall notify the enforcement official of any such revocation or termination within seven days.

D. Except where this chapter expressly requires evidence of property ownership, all obligations, standard conditions, and penalties applicable to an owner under this chapter shall apply equally to a qualifying tenant operating a homesharing rental, and a qualifying tenant's landlord consent and lease or rental agreement shall be accepted in lieu of proof of ownership.

E. A qualifying tenant shall not sublease, assign, or otherwise transfer the qualifying tenant's Short-Term Rental Permit, and shall not use the permit to authorize homesharing rental activity in any dwelling unit other than the qualifying tenant's primary residence and any eligible accessory structure(s) identified in the landlord consent.

16.110.050 Short-Term Rental – Permit Required.

A. The operation of any kind of short-term rental without a Short-Term Rental Permit is prohibited. Only homesharing rentals are eligible for a Short-Term Rental Permit.

B. A Short-Term Rental Permit shall not be issued to any business entity. A natural person, personal or family trust, or a partnership, limited liability partnership, or limited liability company that does not qualify as a "business entity" shall not maintain any financial interest in more than one short-term rental. For this purpose, financial interest includes both legal and beneficial ownership and any arrangement that provides for receipt of any portion of revenue generated by the short-term rental. For purposes of this section, a person shall be deemed to have a financial interest in any short-term rental that is owned by their spouse or registered domestic partner regardless of the terms of any contractual arrangement, such as any transmutation (i.e., pre- or post-nuptial) agreement. An owner or qualifying tenant shall only be issued and can only maintain one Short-Term Rental Permit at any time.

C. Each owner or qualifying tenant of a short-term rental who rents, exchanges, trades, gifts, or grants such short-term rental for a period of less than 30 consecutive days shall fully comply with all provisions of this chapter related to the use and occupancy of a short-term rental, and the operational requirements provided in this chapter.

D. No owner or qualifying tenant of residential property in the City shall rent any short-term rental for a period of less than 30 consecutive days without a valid short-term rental Permit pursuant to this chapter.

E. A copy of the current Short-Term Rental Permit as issued by the City and the maximum number of guests allowed on the premises shall be displayed in a clear and legible manner in a conspicuous and easily accessible location in the short-term rental and on all advertising related to the short-term rental, including without limitation, web-based advertising, hosting platform, print media, and television.

F. The issuance and/or renewal of a Short-Term Rental Permit shall be deemed

evidence that the holder of such Permit has registered a short-term rental with the City and that holder acknowledges the holder's obligation to comply with all provisions of this chapter and the code. The issuance of a Permit shall not be construed as bestowing or granting any vested right of entitlement.

16.110.060 Caps on Short-Term Rental Permits based on STR Zone.

A. The City shall not issue any new Short-Term Rental Permits in any STR zone in which the STR zone cap has been exceeded or would, with the issuance of any such Permit, be exceeded. In the event the STR zone cap has been exceeded for a particular STR zone, and more than one additional complete applications are on file with the City for Short-Term Rental Permits within that STR zone, if and when the Permits issued for that STR zone falls below the applicable STR zone cap, any additional Short-Term Rental Permits for that STR zone shall be issued in order of the date on which complete applications were received by the City (i.e., on a "first in time, first in right" basis).

16.110.070 Agency.

A. An owner or qualified tenant may retain an agent with an exclusive listing arrangement or representative to assist in the compliance with the requirements of this chapter, including, without limitation, the filing of a complete application for a Short-Term Rental Permit, the management of the short-term rental unit, and compliance with the requirements of this chapter including the collection and payment to the City of all transient occupancy taxes due and payable on the short-term rental. The owner and any such agent or representative of the owner must have the authority to remove any guest of the short-term rental for violation of any provision of this chapter or regulation thereof. Except as provided in subsection (B) of this section and notwithstanding any agency relationships between an owner and an agent or representative, the owner of the short-term rental shall execute all applications and documentary requirements as provided in this chapter and shall remain responsible for compliance with the provisions of this chapter. The failure of an agent to comply with this chapter shall not relieve the owner of the owner's obligations under the provisions of this chapter.

B. In the event an owner or qualified tenant enters into an exclusive listing arrangement, the Short-Term Rental Permit may be secured, and the transient occupancy registration certificate requirements provided in this chapter may be performed by the agent or representative and not by the owner or qualified tenant; however, the agent or representative shall separately account all revenues and costs on a per property basis, including without limitation transient occupancy taxes and the gross rent amounts used to calculate such taxes.

16.110.080 Short-Term Rental Permit Application Requirements.

A. An applicant for a Short-Term Rental Permit shall apply for the Permit on an application form furnished by or acceptable to the enforcement official and signed by the applicant under penalty of perjury. Each application shall contain the following

information:

1. The name, address, and telephone number of the Host of the property for which the Short-Term Rental Permit is to be issued. The name, address and telephone numbers of any other natural persons, limited liability companies or personal or family trusts that hold any financial interests in the short-term rental as well as copies of legal documents creating such financial interests.
2. The name, address, and telephone number of the exclusive listing agent, if any, of the Host of the unit.
3. The name, address, and 24-hour telephone number of the local contact person and verification that the local contact person can respond in person to the short-term rental property within 30 minutes. The local contact person may only use the address of the short-term rental if the local contact person will be present at the unit for the duration of each rental period.
4. The address of the residential property proposed to be used as a short-term rental.
5. The number of bedrooms and the applicable overnight and daytime occupancy limit of the unit consistent with the provisions of 16.110.090(B).
6. Evidence of a valid transient occupancy registration certificate issued by the City for the short-term rental.
7. Acknowledgment of receipt and inspection of a copy of all regulations pertaining to the operation of the short-term rental type.
8. Executed indemnification and hold harmless agreement in a form approved by the City Attorney, agreeing to indemnify, save, protect, hold harmless, and defend the City of Claremont, the City Council of the City of Claremont, individually and collectively, and the City of Claremont representatives, officers, officials, employees, agents, and volunteers from any and all claims, demands, damages, fines, obligations, suits, judgments, penalties, causes of action, losses, liabilities, or costs at any time received, incurred, or accrued as a result of, or arising out of owner's actions or inaction in the operation, occupancy, use, and/or maintenance of the property.
9. Evidence of insurance coverage as required under Section 16.110.090(~~V~~Y) of this chapter.
10. Completion of building, fire, and safety inspection and completion of any corrections identified by an enforcement official. Such inspections shall include a review of the premises for compliance with the operational requirements of this chapter, including without limitation determining the total number of qualified bedrooms.
11. Written acknowledgement in a form approved by the enforcement official of distribution of a neighbor notice. The ~~Owner~~ host of a detached unit shall distribute a neighbor notice to properties abutting, directly, and diagonally across the street from their property. The owner of an attached unit shall distribute a neighbor notice to properties that directly share a wall, ceiling, or floor with their unit.
12. Written acknowledgement in a form approved by the enforcement official that there are no covenants or other deed restrictions on the property that prohibit or limit the use of the property as a short-term rental. The enforcement official may accept a written consent from the governing board of a homeowners' association

with jurisdiction over the property in satisfaction of this requirement.

13. Such other information as the enforcement official deems reasonably necessary to administer this chapter.
14. If the applicant is a qualifying tenant, a copy of the applicant's written lease or rental agreement and the landlord consent required under Section 16.110.045 (Qualifying Tenants).

B. The application for a Short-Term Rental Permit shall be accompanied by a fee established by resolution of the City Council; provided, however, the fee shall be no greater than necessary to defer the cost incurred by the city in administering the provisions of this chapter.

C. A Short-Term Rental Permit application shall be denied if a Permit for the same unit or issued to the same owner has previously been revoked pursuant to Section 16.110.120 ~~130~~. The denial of a Short-Term Rental Permit for any reason may be appealed in accordance with the provisions of ~~Chapter 16.321 of the Municipal Code~~ Section 16.110.085 (Appeals).

D. Short-Term Rental Permits do not run with the land. Upon change of property ownership, the Short-Term Rental Permit shall automatically terminate, and the property shall not be used as a short-term rental until the new or successor owner or qualified tenant is issued a Short-Term Rental Permit. The provisions of Section 16.110.050(b) shall be applicable to any such new or successor owner or qualified tenant. In the event of a change in agent or the occurrence of any other material fact set forth in the annual registration, a new Short-Term Rental Permit shall be required to continue the operation of the short-term rental and within seven days of said change the owner or qualified tenant or their exclusive listing agent shall submit the required registration and fee.

E. The recipient of a Short-Term Rental Permit must notify the enforcement official within seven days of the date the short-term rental property is sold or otherwise disposed of or after an event that results in the unit no longer being used as a short-term rental.

16.110.085 Appeals.

A. This section applies to any denial, suspension, or revocation of a Short-Term Rental Permit under this chapter.

B. Any applicant or permit holder aggrieved by a denial, suspension, or revocation of a Short-Term Rental Permit may appeal the decision to the Director by filing a written appeal with the enforcement official no later than close of business on the tenth calendar day following the date of the decision. The Director shall review the matter de novo and issue a written decision.

C. Any applicant or permit holder aggrieved by the Director's decision under subsection (B) may appeal the decision to the Planning Commission by filing a written appeal with the enforcement official no later than close of business on the tenth calendar

day following the date of the Director's decision. The Planning Commission shall review the matter de novo and issue a written decision.

D. Any applicant or permit holder aggrieved by the Planning Commission's decision under subsection (C) may appeal to the City Council by filing a written appeal with the City Clerk no later than close of business on the tenth calendar day following the date of the Planning Commission's decision. The decision of the City Council shall be final.

16.110.090 Operational Requirements and Standard Conditions.

A. The ~~owner~~ host shall use reasonably prudent property ownership/management practices to ensure that the short-term rental complies with all applicable codes regarding fire, building and safety, health and safety, and all other relevant laws.

B. The ~~owner~~ host shall limit overnight occupancy of the short-term rental to no more than two persons per bedroom plus one (e.g., for a two-bedroom short-term rental, the maximum occupancy would be five guests), and no more than eight occupants total (regardless of the number of bedrooms). The ~~owner~~ host may allow up to two minor children, age 12 or under, to occupy the short-term rental in addition to the maximum number of occupants otherwise permitted under this subsection. For the purposes of this section, a studio shall be considered a one bedroom. The number of bedrooms in a short-term rental shall be verified by the enforcement official using county assessor records, city building records, and/or a physical inspection of the premises prior to the issuance of a Short-Term Rental Permit.

C. The ~~owner~~ host shall limit daytime occupancy of the short-term rental to no more than double the overnight occupancy limit (e.g., for a two-bedroom short-term rental, the maximum daytime occupancy would be ten guests), and no more than sixteen occupants total. Daytime occupancy shall include visitors or guests who are not staying on the property overnight.

D. A maximum of one vehicle per bedroom, plus one additional vehicle (e.g. for a two bedroom short-term rental, the maximum number of vehicles is three vehicles), is allowed for each short-term rental. Overnight parking for all vehicles must be provided on-site. For the purposes of this section, a studio shall be considered a one bedroom.

E. Advertising and/or renting one or more short-term rentals as part of a cluster or compound is prohibited.

F. Reserved.

G. Reserved.

H. If the ~~owner~~ host of a homesharing rental does not live on-site in the home, and/or is not able to respond within 30 minutes to complaints regarding the condition, operation, or conduct of occupants of the homesharing rental, the property shall be

deemed a vacation rental, which is not permitted.

I. During the rental term each short-term rental is rented, the ~~owner~~ host, their agent, and/or the local contact person designated by the ~~owner~~ host, after being contacted by the enforcement official, shall be available 24 hours per day, seven days per week, for the purpose of: (1) responding by telephone within 15 minutes of complaints from or through the hotline; and (2) responding in-person within 30 minutes to any additional or successive complaints regarding the condition, operation, or conduct of occupants of the short-term rental.

J. The ~~owner~~ host shall use reasonably prudent property ownership/management practices to ensure that the occupants and/or guests of the short-term rental do not create unreasonable noise disturbances, engage in disorderly conduct, or violate provisions of the municipal code or any state law.

K. Notwithstanding the provisions of Section 16.154.020, any radio receiver, musical instrument, phonograph, loudspeaker, sound amplifier, or any machine or device for the producing or reproducing of any sound shall be conducted within a fully enclosed structure and shall not be audible at the property line of the short-term rental.

L. Prior to occupancy pursuant to each separate occasion of rental of a short-term rental, the ~~owner~~ host or the ~~owner's~~ host's agent or representative shall enter into a digital or hard copy written contract with a responsible person where: (1) the responsible person will provide the responsible person's name, age, address, and a copy of a government issued identification; (2) establishes and sets out the terms and conditions of the contract, including without limitation, occupancy limits, noise prohibitions, and vehicle parking requirements; (3) requires the responsible person to acknowledge and agree that he or she is legally responsible for compliance of all occupants of the short-term rental or their guests with all provisions of this chapter and/or the municipal code; (4) the ~~owner~~ host or the ~~owner's~~ host's agent provides a copy of the "Good Neighbor Brochure" to the responsible person; (5) the responsible person provides a list of all guests by name; and (6) the responsible person provides a list of all guests' vehicles, including license plate numbers. Each contract shall be maintained by the ~~owner~~ host or the ~~owner's~~ host's agent for a minimum of four years and shall be readily available for inspection upon request of the enforcement official. ~~A summary or abstract of the contract, in a form approved by the enforcement official, shall be filed with the enforcement official prior to each applicable occupancy, in a manner approved by the enforcement official.~~

M. In the event the enforcement official notifies the ~~owner~~ host or their agent that the responsible person, including any occupant and/or guest of the short-term rental unit, has created unreasonable noise or disturbances, engaged in disorderly conduct, or committed one or more other violations of provisions of the City's Municipal Code or any state law, the ~~owner~~ host shall promptly respond in a timely and appropriate manner to prevent a recurrence of such conduct by those occupants or guests, and remove one or more of the guests when requested by the enforcement official. For the purpose of this subsection and subsection (M) below, the phrase "in a timely and appropriate manner" shall mean in-person contact within 30 minutes for any call from

the enforcement official.

N. Failure of the ~~owner~~ host or their agent to respond to calls or complaints regarding the condition, operation, or conduct of occupants of the short-term rental in a timely and appropriate manner shall be grounds for imposition of penalties as set forth in this chapter. It is not intended that an ~~owner~~ host , agent, or local contact person act as a peace officer or place himself or herself in an at-risk situation.

O. Trash and refuse shall not be left stored within public view, except in proper containers for the purpose of collection by the collectors in compliance with section 8.08.220. The ~~owner~~ host shall use reasonably prudent property ownership/management practices to ensure compliance with all the provisions of Chapter 8.08 of the Municipal Code (Garbage and Solid Waste).

P. All home repairs (external and internal), garden and yard maintenance, and pool cleaning and maintenance shall comply with all provisions of Chapter 16.154 of the Claremont Municipal Code (Environmental Protective Standards).

Q. The ~~owner~~ host or the ~~owner's~~ host's agent or representative shall meet and greet the responsible party at the short-term rental and obtain their name, address, and a copy of a valid government identification. The ~~owner~~ host or ~~owner's~~ host's agent shall explain and describe all rules and regulations applicable to the use of the property as a short-term rental and the responsibilities of the responsible party to the neighbors and the City as well as the ~~owner~~ host. If an in-person meeting is not feasible, the ~~owner~~ host or the ~~owner's~~ host's agent may communicate with the responsible party through digital written or verbal means, provided all required information is shared, including the rules, regulations and responsibilities of the responsible party.

R. The ~~owner~~ host of the short-term rental shall post a copy of the Short-Term Rental Permit and a copy of the conditions set forth in this section, including all rules and regulations applicable to the use of the property as a short-term rental, in a conspicuous and easily accessible location in the unit. For the purposes of a homesharing rental unit, this may be located in the rented room or portion of the home.

S. The ~~owner~~ host shall provide each occupant of a short-term rental with the following information prior to occupancy of the unit and/or post such information in a conspicuous place within the unit:

1. The name of the managing agency, agent, rental manager, local contact person, or owner of the unit, and a telephone number at which that party may be reached on a twenty-four-hour basis;
2. The maximum number of occupants permitted to stay in the unit during the day and overnight;
3. The trash pick-up day and applicable rules and regulations pertaining to leaving or storing trash or refuse on the exterior of the property;
4. Notification that any radio receiver, musical instrument, phonograph, loudspeaker, sound amplifier, or any machine or device for the producing or

reproducing of any sound shall only be operated within a fully enclosed short-term rental and shall not be audible at the property line of the short-term rental;

5. Notification that the occupant may be cited or fined by the city and/or immediately removed by the owner, in addition to any other remedies available at law, for creating a disturbance or for violating any provision of this chapter;
6. Notification that failure to conform to the occupancy requirements of the short-term rental is a violation of this chapter;
7. A copy of this chapter of the Claremont Municipal Code, as may be amended from time to time.

T. The use of a short-term rental shall not violate any applicable conditions, covenants, or other restrictions on real property.

U. The ~~owner~~ host shall comply with all provisions of Chapter 3.28 of the Municipal Code concerning transient occupancy taxes, including, but not limited to, submission of a monthly return for each short-term rental in accordance with Section 3.28.060. The monthly return shall be filed each month regardless of whether the short-term rental unit was rented or not during each such month.

V. The enforcement official shall have the authority to impose additional standard conditions, applicable to all short-term rentals, as necessary, to achieve the objectives of this chapter. A list of all such additional standard conditions shall be maintained and on file in the office of the City Clerk and such offices as the City Manager designates.

W. Notwithstanding the provisions of subsection (~~W~~T) ~~below~~ above, upon a determination of good cause, the enforcement official may impose additional or special standards or requirements for placement or imposition of special conditions or performance standards for ~~owner~~ host, ~~owner's~~ host's agents, local contact persons, and their affected short-term rentals. The standard conditions may be modified by the enforcement official upon request of the ~~owner~~ host or their agent based on site-specific circumstances for the purpose of allowing reasonable accommodation of a short-term rental. All requests must be in writing and shall identify how the strict application of the standard conditions creates an unreasonable hardship to a property such that, if the requirement is not modified, reasonable use of the property as a short-term rental would not be allowed. Any hardships identified must relate to physical constraints to the subject site and shall not be self-induced or economic. Any modifications ~~of~~ to the standard conditions shall not further exacerbate an already existing problem.

X. The enforcement official shall have the authority to establish administrative rules and regulations, which may include, but are not limited to, permit conditions, reporting requirements, inspection frequencies, enforcement procedures, advertising restrictions, disclosure requirements, or insurance requirements consistent with the provisions of this chapter, for the purpose of implementing, interpreting, clarifying, carrying out, furthering, and enforcing the requirements and the provisions of this chapter. No person shall fail to comply with any such regulation. A copy of such administrative rules and regulations shall be on file in the office of the City Clerk.

Y. ~~owner~~ Host shall procure, maintain, and pay premiums for commercial insurance policies that cover short-term rental of property for each short-term rental with minimum limits as may be established by the city manager from time to time. Proof of a short-term rental platform's standard coverage may be sufficient for this section.

Z. ~~owner~~ Host in good standing shall secure a biannual building, fire and safety inspection prior to renewal of the Short-Term Rental Permit. ~~owner~~ Host with one or more violations shall secure an annual building, fire and safety inspection prior to renewal of the Short-Term Rental Permit.

16.110.100 Specific Prohibitions.

A. No person or entity shall place or caused to be placed or maintain or cause to be maintained any advertisement of a short-term rental that is in violation of any provision of this chapter.

B. Short-term rentals are prohibited in units in multifamily housing. No person or entity shall offer or provide an apartment, or any portion thereof, as a rental for less than 30 consecutive days to any person. This prohibition shall not apply to duplexes.

C. No landlord shall evict any tenant or otherwise terminate a lease for the purpose of converting the rental unit to a short-term rental or in anticipation of converting the rental unit to a short-term rental. In addition to any other remedy provided under the Claremont Municipal Code, failure to comply with this provision may be asserted as an affirmative defense in an action brought by or on behalf of the landlord to recover possession of the rental unit.

D. No person shall offer to rent ~~or rent~~ an junior accessory dwelling unit (JADU) for a rental period of less than 30 consecutive days.

E. Reserved.

F. Reserved.

G. No person who received funding through the City's ADU Grant Program or other city-provided funds for an ADU or JADU shall offer or provide an ADU, JADU, or primary residence for a rental period of less than 30 consecutive days during the terms of the covenant.

H. No person shall use, or allow the use of, a short-term rental property for commercial and/or social events, including but not limited to weddings, receptions, baby showers, corporate gatherings, parties, or similar events that exceed the approved occupancy limits or generate income, sponsorship, or promotional benefits for the host. This prohibition applies regardless of whether the event is advertised, ticketed, or privately hosted. Short-term rental properties shall be used solely as temporary lodging accommodation.

16.110.110 Audit.

Each ~~owner~~ host and agent or representative of any ~~owner~~ host shall provide the enforcement official with access to each short-term rental and the books, records, documents, papers, tax returns, and financial records at any time during normal business hours as the enforcement official may determine are necessary or convenient for the purpose of inspection or audit to determine that the objectives and conditions of this chapter are being fulfilled.

16.110.120 Violations.

A. Any person who violates a provision of this chapter is subject to criminal sanctions and administrative penalties pursuant to Chapter 16.406 and the specific penalties as provided in this chapter. Any person who uses, or allows the use of, residential property in violation of the provisions in this chapter is guilty of a misdemeanor for each day in which such residential property is used, or allowed to be used, in violation of this chapter. An administrative citation issued pursuant to Chapter 16.406 for a first violation shall be $100, for a second violation $200 and each subsequent violation shall be $500. Each administrative citation for a violation of any provision of this chapter shall be levied or assessed against the ~~owner~~ host or responsible person.

B. Upon the third violation in any twelve-month period, the enforcement official shall suspend the Short-Term Rental Permit for two years. Notwithstanding the preceding sentence, failure by any person who is responsible to remit to the city the city's transient occupancy tax pursuant to Chapter 3.24 following written notice to do so, shall result in a suspension for 12 months of that person's Short-Term Rental Permit for the applicable property.

C. Any person who operates a short-term rental without the required Short-Term Rental Permit, shall be liable to the City for the payment of transient occupancy tax pursuant to the provisions of the Claremont Municipal Code Chapter 3.24, including, without limitation, penalties and interest, payment of an administrative fine in the amount of $100, and permanent ineligibility to operate a short-term rental in the city. In the event the person continues to operate a short-term rental without a Short-Term Rental Permit, the person shall be liable for an administrative fine in the amount of $200 for the second violation and $500 for each subsequent day the short-term rental is operated without a certificate.

D. Any person who advertises a short-term rental without including the Short-Term Rental Permit number in any advertising for such short-term rental or without timely tendering full monthly payments of transient occupancy tax, shall pay a fine in the amount of $100 and the ~~owner's~~ host's Short-Term Rental Permit may be suspended for six months for a first offense and shall pay a fine in the amount of $200 and the ~~owner's~~ host's Short-Term Rental Permit may be revoked for a second offense. For each subsequent violation the City may impose a fine in the amount of $500.

E. The failure of an ~~owner~~ host or the ~~owner's~~ host's agent or representative to comply with an order of any police officer may result in the revocation of the Short-Term

Rental Permit.

F. The appeal ~~and hearing provisions of Chapter 16.321~~ provisions of Section 16.110.085 (Appeals) shall apply to any revocation or suspension of a Short-Term Rental Permit.

G. Any person who fails to pay any fee or charge provided in this chapter within the time required shall pay a penalty in the amounts established by the City Council by resolution. Such penalty may also include interest from the date on which the fee or charge became due and payable to the city until the date of payment.

H. The filing of knowingly false claims against a short-term rental or the guests staying in a short-term rental is prohibited and shall be punishable by administrative fines as provided in Chapter 16.406 of this code.

I. In addition to, and not in lieu of, any other remedy allowed by law, all remedies prescribed under this chapter are cumulative and the election of one or more remedies does not bar the city from the pursuit of any other remedy, criminal, civil, or administrative which may be pursued by the city to enforce this chapter and/or address any violation of this code or to remedy any other public nuisance.

16.110.130 Requirements Not Exclusive.

The requirements of this chapter shall be in addition to any license, permit, or fee required under any other provision of this code. The issuance of any permit pursuant to this chapter shall not relieve any person of the obligation to comply with all other provisions of this code pertaining to the use and occupancy of Short-term rental or the property on which it is located.

~~**16.110.140 Pilot Program**~~

~~This chapter is a pilot program that shall be re-evaluated by the City Council after one year of its effective date. The City makes no commitment to renew Short-Term Rental Permits if it discontinues this pilot program.~~

16.110.150 Short-Term Rental Facilitator

A. Pursuant to, and consistent with, Government Code Chapter 4.6 (commencing with Section 50990), as added by Senate Bill 346 (Chapter 751, Statutes of 2025) and as may be amended from time to time or replaced by a successor statute, the City is authorized to require a short-term rental facilitator to report to the enforcement official, in the form and manner prescribed by the enforcement official, the physical address, including the nine-digit ZIP Code, of each short-term rental located within the City for which the facilitator processes a reservation or collects payment during a reporting period established by the enforcement official.

B. The enforcement official may request additional information from a short-term rental facilitator when the physical address provided is not sufficient to identify a specific

short-term rental unit within the City, consistent with Government Code Section 50990 et seq.

C. A short-term rental facilitator that fails to timely file a report required under this section may be subject to an administrative fine or penalty, as established by resolution of the City Council in addition to any other remedy available under this chapter.

D. A short-term rental facilitator shall not prohibit, restrict, or otherwise interfere with direct communication between a host and a guest, and shall not require a host or guest to use the facilitator's internal messaging system as the exclusive means of communication.

SECTION 4. If any provision of this Ordinance is found to be unconstitutional or otherwise invalid by any court of competent jurisdiction, that invalidity shall not affect the remaining provisions of this Ordinance which can be implemented without the invalid provisions, and to this end, the provisions of this Ordinance are declared to be severable. The City Council hereby declares that it would have adopted this Ordinance and each provision thereof irrespective of whether any one or more provisions are found invalid, unconstitutional or otherwise unenforceable.

SECTION 5. The mayor shall sign this ordinance and the city clerk shall attest and certify to the passage and adoption of it, and within fifteen (15) days, publish a summary in the Claremont Courier, a weekly newspaper of general circulation, printed, published, and circulated in the City of Claremont and thirty (30) days thereafter it shall take effect and be in force.

PASSED, APPROVED, AND ADOPTED this __ day of _____, 2026.

_____
Mayor, City of Claremont

ATTEST:

_____
City Clerk, City of Claremont

APPROVED AS TO FORM:

_____
City Attorney, City of Claremont

PLANNING COMMISSION
REGULAR MEETING MINUTES

Tuesday, September 15, 2026 – 7:00 PM
Video Recording is Archived on the City Website
https://www.claremontca.gov/Government/City-Council/Watch-a-Meeting

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CALL TO ORDER

Chair Wong called the meeting to order at 7:00 PM

PLEDGE OF ALLEGIANCE

ROLL CALL

PRESENT	COMMISSIONER: DAVIS, LOVE, MEDAK, ROSENBLUTH, WILLIAMSON, WONG
ABSENT	COMMISSIONER: CALLAWAY
ALSO PRESENT	Chris Veirs, City Planner; Alex Cousins, Senior Management Analyst; Nhi Atienza, Senior Administrative Assistant

CEREMONIAL MATTERS, PRESENTATIONS, AND ANNOUNCEMENTS

There were no ceremonial matters, presentations, or announcements.

PUBLIC COMMENT

This item starts at 0:00:50 in the archived video.

Chair Wong invited public comments.

Commission Secretary Atienza announced that no written public comments were received.

There were no requests to speak. Chair Wong closed public comment.

CONSENT CALENDAR

This item starts at 0:02:57 in the archived video.

Chair Wong invited public comments.

There were no requests to speak. Chair Wong closed public comment.

Commissioner Davis moved to approve the Consent Calendar, seconded by Vice Chair Rosenbluth; and carried on by roll call vote as follows:

1. Planning Commission Meeting Minutes of September 1, 2026
   Approved and filed.

AYES: ***Commissioner - Davis, Love, Medak, Rosenbluth, Williamson, Wong***
NOES: ***Commissioner - None***
ABSTENTIONS: ***Commissioner - None***
ABSENCES: ***Commissioner - Callaway***

PUBLIC HEARING

This item starts at 0:04:41 in the archived video.

3. Consider an Amendment to the Claremont Zoning Code (Title 16 of the Claremont Municipal Code) Amending Chapter 16.110 (Short-Term Rentals) Pertaining to Homesharing Eligibility, Permit Scope, and Short-Term Rental Facilitator Reporting

Senior Management Analyst presented a PowerPoint presentation and addressed Commissioners' inquiries regarding the success of the pilot program, the nature of public comments and summary of the City Council meeting, number of rooms that can be rented at the same time under the same permit, the thought process of not limiting the number of reservations at one time, the number of complaints and violations during the first year, and verification process for owners living on the property.

Chair Wong invited public comments.

Vickie Noble, resident, loves the program. She would like to receive a report from Airbnb indicating the amount that is paid to the City and how the amount is calculated.

There were no additional requests to speak.

Public comment was closed.

Senior Management Analyst Cousins clarified that payment from Airbnb is received in a lump sum and staff is in the process of reconciling the payments internally.

Commissioner Williamson stated that this is a wisely cautious and good approach to saving neighborhoods. The ordinance is comprehensive and she would move for approval.

Commissioner Davis agreed with Commissioner Williamson that this is a measured approach. The changes are uncontroversial. He intends to vote for approval.

Commissioner Love agreed. This is an efficient way to regulate STRs and a great report.

Commissioner Medak inquired if the limitation of 20 per zone can be rolled over. Senior Management Analyst Cousins clarified not at this time. He thought the report was amazing. Staff did a great job.

Vice Chair Rosenbluth stated that the nature of the amendment is reasonable. He is happy with the changes, and the findings can be made.

Chair Wong is glad that there is a consensus. This is a well written report. His only concern is the number of reservations at one time, but is supportive of the changes.

Commissioner Williamson moved to adopt Resolution No. 2026-11, A RESOLUTION OF THE PLANNING COMMISSION OF THE CITY OF CLAREMONT, CALIFORNIA, RECOMMENDING THAT THE CITY COUNCIL ADOPT AMENDMENTS TO CHAPTER 16.110 ("SHORT-TERM RENTALS") OF THE CLAREMONT MUNICIPAL CODE TO EXTEND HOMESHARING ELIGIBILITY TO QUALIFYING TENANTS, CLARIFY THE SCOPE OF SHORT-TERM RENTAL PERMITS, INCORPORATE SHORT-TERM RENTAL FACILITATOR REPORTING REQUIREMENTS UNDER SENATE BILL 346, AND MAKE RELATED CLARIFYING AMENDMENTS. Seconded by Commissioner Davis; and carried on a roll call vote as follows:

AYES:	***Commissioner - Davis, Love, Medak, Rosenbluth, Williamson, Wong***
NOES:	***Commissioner - None***
ABSENCES:	***Commissioner - Callaway***

Chair Wong announced this decision can be appealed within ten calendar days.

ADMINISTRATIVE ITEMS – None

REPORTS

This item starts at 0:32:20 in the archived video.

Staff

City Planner Veirs reported on items of interest from the previous City Council meeting and described future items coming before the Commission.

Commission/Committee

In response to Commissioner Davis' inquiry, City Planner Veirs stated that there have been a few delays at Union on Yale due to the requirement for a parking agreement, but that has recently been approved, and the applicant has indicated that they intend to move forward with construction soon.

ADJOURNMENT

Chair Wong adjourned the meeting at 7:38 PM.

Chair

ATTEST:

Administrative Assistant

Claremont City Council

Agenda Report

File #: 6203 **Item No:** 12.

TO: ADAM PIRRIE, CITY MANAGER

FROM: JEREMY STARKEY, FINANCE DIRECTOR

DATE: OCTOBER 27, 2026

Reviewed by:
City Manager: AP

SUBJECT:

2025-26 GENERAL FUND FINANCIAL UPDATE (UNAUDITED)

SUMMARY

Staff provides a financial update for the General Fund after the end of each fiscal year. The information in this report represents unaudited information for the General Fund. The audited financial statements for all funds, including the General Fund for 2025-26, will be published at the end of this calendar year as part of the City's Annual Comprehensive Financial Report (ACFR). In prior years, information provided in this report has generally not deviated materially from the final annual audited statements.

At the close of 2025-26, a projected General Fund surplus of $3,239,993 was realized from General Fund operations for the fiscal year. The following report details the staff recommendation for the allocation of the 2025-26 General Fund surplus.

RECOMMENDATION

Staff recommends the City Council:

A. Allocate $688,415 of the 2025-26 General Fund surplus to the City's Operating and Environmental Emergency Reserve, bringing the reserve balance to $12,301,475 or thirty percent of budgeted 2026-27 General Fund operating expenditures and transfers out;
B. Allocate and appropriate $1,000,000 of the 2025-26 General Fund surplus for an additional discretionary payment to CalPERS to pay down the unfunded liability on the City's employee pension plans;
C. Allocate and appropriate $500,000 of the 2025-26 General Fund surplus for a contribution to fund the City's Section 115 Pension Trust;
D. Allocate and appropriate $450,000 of the 2025-26 General Fund surplus to fund a permit and business license software implementation project; and
E. Allocate $601,578 or any remaining 2025-26 General Fund surplus after completion of the

annual audit to the City's Equipment and Facility Revolving Reserve.

ALTERNATIVES TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

A. Request additional information.
B. Authorize alternative allocations of the 2025-26 General Fund surplus.

FINANCIAL REVIEW

General Fund revenues and transfers in for 2025-26 totaled $44,015,844, exceeding the adopted budget of $36,739,605.

General Fund expenditures and transfers out originally budgeted for ongoing operations totaled $40,906,176, consisting of $39,034,151 in expenditures and $1,872,025 in transfers out. Actual expenditures and transfers out attributable to current-year operations were $40,775,851, which was $130,325 below budget.

Comparing current-year revenues and transfers in of $44,015,844 to current-year expenditures and transfers out of $40,775,851, the General Fund generated an operating surplus of $3,239,993 at the close of 2025-26. This surplus reflects the excess of revenues received during the fiscal year over the cost of providing current-year services and operations.

In previous years, General Fund surpluses have allowed the City to allocate funds to various set asides such as adding to the City reserves and making additional discretionary payments to CalPERS and the City's Section 115 Pension Trust Fund. The staff recommendations for the allocations of the 2025-26 General Fund surplus are discussed later in this report.

The staff cost to conduct research and prepare this report is estimated at $2,320 and is included in the operating budget of the Financial Services Department.

ANALYSIS

General Fund Revenues

General Fund revenues and transfers in for 2025-26 totaled $44,015,844 against an adjusted full year budget of $36,739,605. Actual revenues represent an excess of revenues relative to the adjusted budget of $7,276,239. Explanations of the major sources of additional revenue are described below:

1. Property Tax: Revenues for 2025-26 were approximately $839,744 higher than the full-year budget of $13,537,252. Growth in Property Tax is based on increases in the assessed value of taxable real property in Claremont, driven by the cost-of-living increase of up to two percent pursuant to Proposition 13, as well as the reassessment of property when it is sold. The growth in assessed value exceeded the four percent increase budgeted from the prior year, resulting in additional revenues for 2025-26.

2. Sales Tax: Revenues for 2025-26 were budgeted at $8,737,000. Actual sales tax receipts for 2025-26 were $11,467,667, an excess of approximately $2,730,667 over the adopted budget.

The increase in sales tax was a result of increases in auto sales, with higher allocation of sales tax resulting from online sales via the County pool, increases in restaurant sales, and higher gas prices at fuel and service stations.

3. Utility User Tax (UUT): At $5,931,383, revenues for 2025-26 were approximately $659,383 higher than the budgeted figure of $5,272,000. The excess of revenues was the result of higher electricity and water costs and the resulting tax on these services.

4. Transient Occupancy Tax (TOT): Revenues of $1,709,363 were approximately $77,363 higher than the budget of $1,632,000 during the fiscal year.

5. Licenses and Permits: Revenues exceeded the budgeted amount of $1,470,500 by approximately $1,254,000 in 2025-26 due to increases in fees from building, grading and public works permits. Construction activities related to residential, commercial and Colleges development remained strong during 2025-26, contributing to the excess of permit revenues.

6. Charges for Services: Revenues were higher than budgetary estimates by approximately $267,387 due to the collection of development review and plan check fees, again related to the development taking place throughout the City.

7. Use of Money and Property: This revenue category includes interest earnings on the City's investment portfolio and the revenue associated with the rental of City facilities. In 2025-26, revenues exceeded the budget of $771,546 by approximately $1,127,260. This was due in large part to interest earnings, which increased significantly as a result of higher interest earnings rates with the City's investments in the State Controller's Local Agency Investment Fund (LAIF), Certificates of Deposit (CDs) and US Treasuries.

Other revenues that exceeded budget included Business License Taxes by $126,293, Fines and Forfeitures by $20,235 for collections of traffic and code enforcement citations, Miscellaneous Revenue by $127,527 resulting from mandated cost reimbursements and settlements, and Other Taxes by $83,789 from document transfer taxes.

General Fund Surplus

Staff recommends the following actions relating to the General Fund surplus of $3.24 million for 2025-26:

1. Operating and Environmental Emergency Reserve: The City's current Operating and Environmental Emergency Reserve balance stands at $11.6 million representing 28.5 percent of 2025-26 General Fund expenditures and transfers out. Staff recommends allocating $688,415 of the surplus to the Operating and Environmental Emergency Reserve. Doing so would increase this reserve balance to $12,301,475, equal to 30 percent of estimated 2026-27 General Fund expenditures and transfers out.

2. Pension Funding: The City Council allocated $2,000,000 in additional funding towards its unfunded pension liabilities from the 2022-23 General Fund surplus, an additional $2,250,000 of the General Fund surplus from 2023-24 and an additional $1,500,000 of the General Fund surplus from 2024-25 to prefunding employee pensions. Staff recommends continuing this practice and proposes to direct $1,500,000 of the General Fund surplus from 2025-26 to prefunding employee pensions. Staff recommends making a $1,000,000 additional

discretionary payment directly to CalPERS to reduce the unfunded accrued liabilities (UAL) on the City's safety and miscellaneous employee pension plans and a $500,000 contribution to the City's Section 115 Trust. Funding in the Section 115 Trust allows local control over the investment of funds allocated for future pension payments; it offsets the Net Pension Liability reported in the City's annual financial statements and allows higher investment returns than in the City's investment portfolio.

3. Permit and Business License Software Implementation Project: Over the last two years, the City implemented a financial ERP system to replace its legacy financial system that was approaching end of life and adding many enhancements to the financial transaction processing and reporting capabilities for the City. Staff is actively exploring replacements and upgrades for the Community Development Department's permitting and land management software, as well as the Financial Services Department's business licensing software. Both of the City's current systems are outdated and near the end of their useful lives. Staff recommends allocating $450,000 from 2025-26 General Fund surplus to this project to cover one-time implementation costs.

4. Equipment and Facility Revolving Reserve: In 2012, the City Council established the Equipment and Facility Revolving Reserve to set aside funding for equipment and facility maintenance expenses above those included in the City's operating budget. Eligible expenditure of these reserve funds include renovation projects, replacement and refurbishments of furniture and equipment, and facility enhancements. The current balance in this reserve is $2,027,577. Staff recommends allocating $601,578 or any remaining surplus after the completion of the 2025-26 audit to this reserve. The allocation of $601,578 would increase its balance to approximately $2,629,155. The reserve will be available to fund equipment replacements or facility improvements with City Council approval. Upcoming projects to be funded with this reserve may include seismic and safety improvements at the Police Department, improvements to the exterior of the historic Claremont Depot, and other deferred maintenance items related to City facilities.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Economic Sustainability Plan, General Plan, and the 2026-28 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Jeremy Starkey
Finance Director