SOUTHWEST SHORE COLONY

OPERATING PLAN AND ARCHITECTURAL-APPEARANCE STANDARDS

July 1, 1998

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I. INTRODUCTION

The Southwest Shore Colony is an officially recognized historic district eligible for listing on the National Register of Historic Places, based upon the neighborhood's age, history, architectural integrity and consistency, and particularly the fact that the cabins' and neighborhood's overall appearance have not changed since first constructed in the 1911-1941 era. The Forest Service and the Colony's residents (acting through their Southwest Shore Colony Association) have recognized their mutual obligations, under the National Historic Preservation Act, to protect and preserve these historic resources.

This Operating Plan and Architectural-Appearance Standards are intended to reflect and comply with such obligations.

The 1989 Caltrans historic district survey of the area identified six of the cabins below the highway, and almost all of those above the highway, as currently "non-contributing" to the historic district, primarily due to additions or changes which harmfully altered their historic appearance. As the result, the historic district boundaries now encompass all cabins below the highway and only three cabins above the highway. Also, some of the "non-contributing" structures below the highway have, by approved restoration projects, subsequently changed their status to "contributing." "Non-contributing" structures are more vulnerable to removal in connection with any public projects (e.g., highway widening or rerouting), which may be proposed in the future. Also, each "non-contributing" structure within the district weakens the integrity of the entire historic district. Accordingly, all involved parties have a strong interest in careful future adherence to these Architectural-Appearance Standards.

The following Standards have been agreed upon by the Southwest Shore Colony Association and the Forest Service, and are binding upon each cabin owner within the Southwest Shore Colony historic district. These Standards were adapted from the general historic district rehabilitation standards and guidelines promulgated by the U.S. Secretary of the Interior. These Standards are subject to revision at any time by written agreement between the Forest Service and the Southwest Shore Colony Association.

II. PERMITS REQUIRED FOR ALL PROJECTS

Before undertaking any alterations, demolitions, significant repairs or rehabilitation projects of any kind, the cabin owner must obtain prior written approval from the Forest Service and the Association. Such written approvals/permits are in addition to any required County building permits, and must be obtained prior to the County permit. In processing such applications, the Forest Service and the Association may seek guidance and direction from an Association-designated architect, and also from the State Office of Historic Preservation. Cabin owners are encouraged to discuss such matters with the Forest Service and/or the Association's designated architect before undertaking design work, in order to receive preliminary guidance, avoid misunderstandings and expedite the decisions. Final applications must be in writing with appropriate dimensional drawings and specific descriptions. Any costs/expenses incurred by the Association or Forest Service (such as for architectural services) may be charged to the cabin owner applicant as a permit fee, as a precondition to issuance of the permit.

III. GENERAL REQUIREMENTS

- A. The distinguishing original qualities, character and integrity of the cabins and area shall be identified and preserved as a historic district. Generally, those qualities and character include:
- The remarkable consistency and compatibility of style, scale, color, siting and overall appearance of the cabins and neighborhood;
- The high level of integrity of the simple rustic forest resort, Craftsman and frontier styles of architecture;

- Rough textured building materials emphasizing extensive use of unmilled or rough-sawn wood, native stone, shingles, logs, pine bark trim and other forest materials;
- Absence of metallic, highly finished or reflective surfaces, plywood, "sheet goods," or plastered or stucco surfaces;
- Harmony of the cabins and other improvements with the forest site, and minimal disturbance to the natural setting;
- Low density; rustic, unpaved, single-lane roads;
- Absence of modern intrusions or alterations;
- Continued existence of the original structures, only a few of which have been lost over time; and
- Maintenance of the atmosphere and overall appearance of an early 1900's rustic summer retreat.
- B. Any maintenance or rehabilitation efforts must carry out the themes of preservation or restoration to original condition (which does not necessarily mean most recent condition), and must not introduce any inconsistent or incompatible elements which would detract from the original proportions, style or character-defining appearance or from the other cabins in terms of design, size, scale, color, texture or material. Whenever possible, repair is to be favored over replacement. If repair is not feasible, the replacement material must match the original (not necessarily the most recent) in size, composition, design, texture, color and other visual qualities. There are now readily available local mill sources for replacement of damaged or lost rustic wood articles, including rough-sawn boards, unmilled posts and rails, trim with pine bark attached, etc.
- C. These Standards are intended to convey the broad scope of actions which can potentially enhance or diminish the historic values of the area, and the comprehensiveness of the controls necessary to maintain the integrity of the district. These standards are also intended to provide guidance to all concerned, as to the kinds of maintenance, rehabilitation, alteration and improvement efforts which are to be required, permitted, discouraged or prohibited. Not all situations can be anticipated, so if these Standards are silent as to a particular matter, no assumption should be made about its proper resolution, and inquiry must be made to the above-mentioned resources. Any particular proposal for rehabilitation, restoration, alteration or improvement will be evaluated on its own merits, using these Standards as guidelines and background. Past mistakes will not be regarded as precedents for future proposals.
- D. Any proposed alterations and appearance-altering structural improvements must be justified in terms of meeting a significant need, and also in terms of having selected the change which is least destructive of the historical appearance and/or is most advantageous from a restoration perspective. If structural alterations are justified by need, they are if feasible to be accommodated in secondary areas such as back side of cabin or under-porch area rather than in a character-defining area, and in any event shall be consistent with the original architectural style, scale and general appearance of the cabin and neighborhood. Cabin owners are encouraged to remove inappropriate, non-

contributing elements and materials, and replace them with appropriate elements and materials.

- E. As part of permitting an alteration or improvement, a cabin owner may be required to make additional changes in the nature of mitigation or restoration. For example, a cabin owner who seeks approval to add a room to the back of a cabin may as part of that permission be required to restore a closed-in front porch to its original open condition, and/or restore damaged or lost pine-bark window trim. Cabin owners are encouraged to propose such mitigation efforts whenever proposing a potentially negative change.
- F. <u>Contributing structures damaged</u>, destroyed, or substantially destroyed (as by fire), may be rebuilt, but only upon demonstrable evidence that the replacement or rebuilt structure is substantially identical to the damaged or destroyed structure. For this purpose, owners are encouraged to document accurately (by photographs and dimensional drawings) their structures and retain such records in a safe place.

IV. LANDSCAPE

Required	<u>Prohibited</u>
Retention of natural, open forest landscape. Protection of the integrity and appearance of the hillside slopes of the area, many of which are fragile and unstable. Minimal and distantance to extend action.	 Fences of any kind (except where specially approved, in writing, by the Forest Service) Any boundary markers, such as lines of rocks Painting or whitewashing rocks or trees Paved patio areas, or concrete slabs
Minimal or no disturbance to natural setting, site or ground	• Cutting into hillsides, or filling, to extend roads or parking spaces
 Retention, restoration and protection of native plants and trees Removal of hazard trees which pose a danger to 	• Introducing trees or other vegetation of a kind not native to the area, or which are dependent upon irrigation
your structures, whether or not the tree is located on your lot (requires prior written approval of Forest Service)	• Planting and/or pruning trees or plants in any formal pattern such as a hedge, screen or row
	Plastic or artificial flowers or plants
	• Pruning trees or plants in a way which creates an unnatural appearance

Required	<u>Prohibited</u>
	• Lawns, flower beds, sprinkler systems, gardens, orchards, hedges, birdbaths, statues or other non-forest landscape features
• Inconspicuous rustic paths, using native stone if steps are necessary	• Elaborate, paved or formalized paths, railings or other constructed features, except when approved for safety reasons
• Inconspicuous placement of water tanks, butane tanks and septic holding tanks; exposed water or butane tanks must not be oversize; if water tank cannot be placed inconspicuously, it may be required to be placed under ground; exposed tanks are to be painted forest colors	 Parking awnings, or other extraneous structures, even if temporary A cluttered "tank farm" appearance due to oversize tank, or too many conspicuous tanks in an exposed area
• Any excavations for underground tanks, wells, etc., must include appropriate measures to restore natural appearance, prevent soil erosion and damage to vegetation, and appropriate placement or removal of excess soil or tailings.	Barricades or obstacles erected to discourage pedestrian passage.
	• Any project or activity which threatens erosion or other alteration or damage to fragile slopes or to sensitive riparian and/or wet meadow areas.

V. ROADS, GATES AND ROAD SIGNS

<u>Required</u>	<u>Prohibited</u>
• Unpaved roads and parking areas in current	Paved or graveled parking areas.
condition (i.e., paved only on steep grades) are an identified feature of the historic district.	• Expansion, widening or extension of roads, driveways or parking areas.
• All on-site roads are primitive single-lane	
driveways. They were built, and are maintained, solely by the residents and their road associations. There is very limited parking space, and a "parking lot" appearance would detract	• Written or verbal statements to members of the public discouraging or prohibiting reasonable pedestrian access.
from the rustic forest setting. Vehicular access and parking is therefore limited to residents and invitees only. Public parking is limited to highway turnout areas.	• Directional signs and road signs are not to be attached to trees, other vegetation or natural features.
• Any road gates must be situated and constructed so that pedestrians can conveniently pass. Any locking gates must use locks which can be opened by standard emergency vehicle keys.	
• Directional signs and road signs are to: (1) be limited in number to that essential for direction; (2) use cabin number rather than owner's name; (3) be of modest size and rustic appearance; and (4) be worded so as not to prohibit or discourage appropriate pedestrian access to roads and paths.	

VI. <u>CABIN SIGNS</u>

Required	Prohibited
 Cabin signage will be a continuing subject of investigation and discussion, as an important aspect of historic district integrity. The probable result will be to specify the small baked enamel green and white signs which were historically used on all of the cabins. Pending a final decision, cabins wishing to have identification signs must either use the historic green and white enamel signs, or meet the following appearance standards: (1) Signs are to be of rustic natural material and appearance, and of small size, so that the sign does not itself become a competing focal point of the structure; (2) Use forest colors, compatible with the house colors; (3) Text to be limited to letters 2" or less in height, except for cabin number which must be no less than 3" and no more than 4" in height; (4) Sign is to be attached to the cabin structure (i.e., not to be free-standing). 	 Oversize or elaborate cabin identification signs Other unauthorized signs Cabin owner's name displayed on directional signs or anywhere other than the owner's cabin Signs attached to trees or other vegetation or natural features

VII. <u>LIGHTING</u>

Required	<u>Prohibited</u>
 Simple, unobtrusive, shaded lighting and light fixtures compatible with 1920's practices, with low wattage bulbs Yellow "bug lights" are recommended for any 	• Fixtures which provide "landscape lighting," decorative lighting of cabin exterior or of surroundings, "security" lighting, floodlighting, spot lights, use of bright lights, unshaded lights, high
exterior lighting due to their low-glare qualities	intensity lights, industrial-type lighting or any other lighting which detracts from the natural visual effect one would expect in a rustic forest enclave

VIII. GENERAL APPEARANCE AND STORAGE

<u>Required</u>	Prohibited
A neat and uncluttered cabin and surrounding area	• Any temporary structures, such as tents, mobile home trailers, RV coaches or camper vehicles.
Compliance with all fire prevention rules, including clearance of flammable material from house area, repair of frayed wires, etc.	• Solar collectors, TV antennae, other conspicuous antennae, or satellite dishes (excepting the small — 18" or less — portable dish placed in inconspicuous position with prior Forest Service approval).

Required	<u>Prohibited</u>
	Patio or window awnings, parking awnings, or other extraneous modern additions
	• Storage of equipment, tools or supplies in visible areas
	• Piles of refuse, debris or lumber. (Open storage of a reasonable volume of stacked firewood, cut to size, is permitted in a single area, but should be suitable distance from cabin for fire safety reasons)
	• Exterior exhibition of manufactured accessories, such as propellers, whirly-gigs, knickknacks, statues, artificial plants or flowers, plastic gimcracks, strings of pennants, or other novelties or adornments
	Playground equipment, playhouses, etc.
	• Outdoor furniture or accessories of a kind which itself becomes a focal point, or competes with or detracts from the basic cabin structure or appearance
	• Introduction of storage sheds or other additional structures
	Accumulation of miscellaneous items around the cabin or on the lot
	• Any other additions which detract from the simplicity of basic cabin structure or the natural setting
Use off-site storage facilities for longer term storage of vehicles, boats and trailers	Open longer-term storage of vehicles, trailers or boats. (Boats docked, or temporarily beached at lakeside while in use, are permitted)

IX. CARE OF BASIC CABIN STRUCTURE, SIDING AND RELATED REPAIRS

Required	<u>Prohibited</u>
• Remove and replace rotted or damaged foundations, piers or other structural supports, and eliminate any earth contact to wood.	• Permitting age, elements, earth-wood contact, structural defects, shifting soil or improper drainage to damage cabin structure
• Level all floors with appropriate foundation repairs.	Stucco or other non-wood surfaces
Achieve proper drainage to avoid structural damage from rain and snow runoff.	
• Ensure that foundations are adequately tied to floor joists. Ensure structural integrity of the building.	
Keep shingles, battens, etc., nailed securely	
• Repair damaged wood by piecing in, patching or reinforcing the wood. If wood must be replaced, use replacement wood which carefully matches old material. (Note exact appearance, and carefully shop for substitute; custom milling may be necessary.)	 Replacing wood siding or any other wood parts with a substitute which conveys a different appearance (except for approved restoration projects) Use of metal or vinyl siding
Note: There are now local Big Bear sawmill sources for rustic wood replacement articles, including rough-sawn boards and battens, unmilled posts and rails, trim with pine bark attached, etc.	Use of plywood siding products

X. <u>CARE OF WOOD SURFACES — PROTECTIVE COATINGS, PRESERVATIVES, STAINS, COLORS</u>

Required	Prohibited
• Maintain existing "earth & forest" colors, especially including naturally weathered colors, rather than imposing a new uniform dark coat	• Introducing new colors to any part of cabin or area
	• Spraying colors over natural bark trim, or otherwise changing trim colors

Required	<u>Prohibited</u>
Clear coats and light transparent stains are therefore preferable to heavy paints	• Use of gloss or enamel paints, even for trim
	• Applying solid color paint to surfaces which have historically been clear-coated, stained or unprotected
Stain any new work, such as replacement porch rails, to match the older weathered parts of house	• Use of conflicting or incongruous finishes or color treatments which draw attention to "new" materials (e.g., highly varnished new "white" wood door or porch railing, as contrasted to dark stained older wood.)
Apply chemical preservatives, (such as clear penetrating wood sealers) to protect exposed surfaces, but do not use chemical preservatives (such as creosote) which change appearance of wood	

XI. **PORCHES**

Required	<u>Prohibited</u>
• Repair porches by reinforcing existing materials and, if necessary, replace decking and understructure rather than total removal of old porch and "fresh start." Carefully remove and retain old siding and rehang it after basic structure rebuilt. However, if old siding is itself not typical of original (e.g., some cabin porches have inappropriate siding from later addition) replace it with appropriate material as indicated below.	 Removing or altering those porches, stairways and entrances which are important in defining the historical character of the cabin Introducing a new porch or stairs incompatible in size, scale, material or color Enclosing a covered porch to gain interior space on primary level. This is an important negative change in appearance of a major aspect of the cabin, and easily destroys historic appearance.
 Note that original porches (1) were almost always enclosed underneath with full siding which either duplicated cabin siding, or used vertical half-logs or lattice work; (2) used unmilled, rough-hewn or rough-sawn wood; (3) used rustic vertical posts such as stripped lodge-pole pine, and rails of similar material; (4) always used vertical posts, never angled posts or modern cantilevered "deck" designs. Also note that the above-mentioned rustic materials are now available locally. 	 Railings or pickets which are not typical of the area or era, especially "Swiss," "cookie cutter," "Alpine" or other elaborate or imported motifs. Angled or cantilevered posts, or diagonal deck railings with built-in benches
 When doing replacement, use physical evidence of deteriorated structure to guide the work, including size, selection of materials, etc., unless the deteriorated structure was itself an incompatible or inappropriate later addition. If no evidence of original work, utilize an approved design which is compatible with cabin and area in terms of scale, style, materials, color, etc. 	

Required	Prohibited
• If an added room or storage area is needed, the "under-the-porch" enclosure generally would be favored over more conspicuous additions, and is also quite typical of historic practice with many of the cabins.	• If under-porch area not enclosed, it should not be used for any storage.
• Under-porch enclosure material must be compatible with cabin and meet general appearance standards (See Part II above)	• Enclosing under-porch area with plywood sheeting or other inappropriate surface
• If porch decking is to be covered by any material other than wood planks, the material should be inconspicuous, subdued, noncontrasting solid forest colors.	

XII. ROOFS AND ROOFING MATERIAL

Required	Prohibited
• Natural treated shingles or compatible substitutes which present a similar rustic shingled appearance, or the solid green or brown composition shingles which are now most typical in the area, or the kind of ribbed tin roof used in the 1920's (with triangular raised vertical separations).	Permitting a leaking roof to remain unprotected
	• "Sheet goods," tar paper, or other "roll" roofing
	• Reflective or shiny surface; corrugated metal, fiberglass or vinyl; or tile or stone
• If roof is tin, paint it an approved uniform dark green or brown forest color; do not let it become reflective or shiny.	• Contrasting colors within the roofing material itself which, e.g., gives a "checkerboard" appearance, or which introduces varying roof treatments on the same cabin.
Any metallic chimneys or vents should be painted a dark flat color rather than presenting a reflective or shiny appearance	• Replacing eaves or gable facings, especially if replaced with new material not compatible in appearance with cabin or area (e.g., replacing weathered rough pine with smooth milled surface)
	• Skylights
	• TV or radio antennae, satellite dish, solar collectors, or similar modern structures, excepting small (18") satellite dishes placed in inconspicuous position approved by Forest Service.
	Adding dormer windows will usually be a detrimental modification
	• Adding other new roofing fixtures or structures which introduce an appearance incompatible with the cabin or area
• Comply with Forest Service fire prevention rules, including proper chimney spark arresters, removal of pine needles from roof, removal of dead tree limbs over house, clearance of tree limbs from chimney area, repair of frayed wires, etc.	

XIII. WINDOWS AND DOORS

Required	Prohibited
• Retaining and preserving original windows and surrounds; repair rather than replace whenever possible.	Removing or changing windows or doors which are important in defining the overall character of the building
• If window is too deteriorated to repair, replace using the old window to guide the new work (unless, of course, the old window was itself a modern addition).	 Changing the number, location, size or glazing pattern of windows, cutting new windows or doors, blocking in windows, or replacing window trim with different material, except as part of approved project Painting windows or doors with white, bright or contrasting "trim colors"
Note that original windows normally featured small panes supported by wood mullions and frames	 Hollow core, apartment-style, steel, or modern wooden paneled doors Any aluminum or metallic frames for windows or doors, including screen doors; new "picture windows"; replacing multipaned sash with new thermal sash; false muntins; burglar bars
If any inappropriate window or door features exist, remove and restore to original appearance with wood frames, including screen doors	 Large plate glass windows Sliding patio glass doors or smooth-surfaced doors
Any replacement doors should be of rough plank construction, rather than of a "store bought" appearance	• Installation of window boxes, or "greenhouse" windows which protrude from exterior wall

XIV. STONEWORK

Required	Prohibited
• Use local granite for all stonework such as steps, foundations, retaining walls and chimneys	• Use of bricks, cinder blocks or any other manufactured materials

Required	Prohibited
• Remove, or cover with local granite, any structures built of blocks, bricks, or other manufactured materials	• Use of materials which do not blend with local rock and soil
	 Use of natural materials in an unnatural method, such as using flagstone as a veneer on a vertical surface Use of artificially colored mortar
Use rustic construction methods	Elaborate or massive new steps and walls
	Any use of stones as formal landscaping or boundary markers

XV. <u>INTERIORS</u>

Required	<u>Prohibited</u>
• Retain and preserve distinctive original interior features, such as fireplaces, mantels, panelling, light fixtures, plumbing fixtures, etc.	• Introducing modern fixtures (light fixtures, building hardware, door latches, etc.) not typical of the era and neighborhood
	Painting out with solid colors over previously unfinished, varnished or clear- coated wood
	• Installing equipment which obtrusively alters appearance of interior or exterior (e.g., large new metal chimney routed through wall and up side of cabin)
Re-use interior material removed during repair work, such as doors, panelling, moldings, trim pieces	Dividing rooms, lowering ceilings, changing any character-defining elements

Required	Prohibited
• Interiors and furnishings which are reflective of, and compatible with, the rustic exteriors (e.g., favor wood panelling rather than dry wall or plaster surfaces, and genuine planks or knotty pine panels rather than plywood or veneered "sheet goods," favor simple free-standing kitchen appliances rather than "built-ins," and simple curtain window treatments rather than drapes or metallic shades or blinds; favor rustic furniture)	• "Modernized" interiors, such as dry wall or plastered ceilings or walls, built-in appliances, full-length drapes, flush lighting treatments, wallpaper, etc.
• Have a qualified inspector identify all potential fire, earthquake and safety hazards, especially those relating to electrical system (including use of extension cords, overloaded plugs, etc.), stoves, fireplaces, hot water heaters, etc., and remedy all hazards and comply with all maintenance standards.	Burning down cabins due to neglected electrical problems, improper screening or venting, etc.

XVI. VIOLATIONS — PERMIT REVOCATIONS

Persistent or repeated violation of any of the above Standards, or other Permit obligations, may result in a required restoration or other affirmative relief to remedy the violation, or in a "for cause" revocation of the cabin owner's Special Use Permit, as provided in Section VIII(a) of the Special Use Permit. In order to preserve the integrity of the Southwest Shore as a historic district, and avoid removal of contributing structures, the following procedures shall apply:

In the event of revocation for cause under Section VIII(a) of the Permit, rather than removing the cabin, the cabin shall be sold to a purchaser prepared to cure the holder's violation. For that purpose, the revoked holder shall be granted a period of 180 days in which to market and sell the improvements to a responsible buyer. Such sale period must include one summer season, and shall be extended as necessary to include that summer season. If the revoked holder fails to proceed promptly and consistently with active marketing of the property, or engages in any act or omission which threatens additional harm to the structure, to neighboring structures, to the historic district or to neighbors, then the initial sale period shall be terminated. If the initial sale period is so terminated, or if it expires without the sale completed, a Forest Service-designated representative shall take possession of the cabin and sell it to a responsible buyer who makes the highest cash offer within a 90-day marketing period. The proceeds of such sale shall be assigned to the revoked holder, after deducting (i) costs of sale (including real estate commissions, marketing costs and reasonable fees to the designated representative charged with handling the sale), (ii) any amounts owed to the Forest Service by the revoked holder, and (iii) the amount of any liens upon the property.

XVII. PUBLIC ACCESS

- Public access and use of the Southwest Shore is generally adequate, and in some areas is detrimental due to overcrowding. No affirmative measures should be taken by the Forest Service or anyone else to attract additional members of the general public to the area.
- The public has the right of pedestrian passage, access by boat, and reasonable pedestrian use of roadways, common pathways and waterfront areas. There shall be no signs posted or statements made to members of the public discouraging reasonable pedestrian use. Such public use is (i) limited to daylight hours, (ii) not to involve camping or the erection of tents or other structures, (iii) not to involve any commercial activities or purposes such as merchandising, filming or tours, and (iv) not to involve fires of any nature, smoking, other unsafe conduct, violation of law, creation of nuisances, damage to the site or to any personal property or improvements, or any activities which interfere with the quiet use and enjoyment of the area by residents or other members of the public. The public has no right of access to private structures or of a reasonable zone of privacy immediately surrounding the structures.

XVIII. ASSOCIATION AS POTENTIAL FUTURE HOLDER OF AREA PERMIT

The Southwest Shore Colony Association is the representative of the permit holders of the Southwest Shore Colony area. The Forest Service and the Association are engaged in discussions which may result in the Association itself by agreement becoming the holder of the permit for the entire Southwest Shore Colony area. If such Association-Forest Service agreement occurs, all individual cabin permits will be cancelled upon notice to the permit holders to that effect and will be replaced by a new permit between permit holders and the Association, which shall be for a term not less than the balance of the term of this permit and require annual rental fees no greater than provided herein, and upon such other conditions as may be required pursuant to the agreement between the Forest Service and the Association.