

Development Driven by Data

City of Morgan Hill Medical/Healthcare Market Study

HdL  ECONsolutions

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Introduction

HdL ECONsolutions was engaged by the City of Morgan Hill, California to evaluate the medical/healthcare market (demand and need for new hospital and healthcare facilities, including medical clinic or medical offices and make recommendations for potential medical/healthcare-related development on two locations being marketed to the medical/healthcare industry.

Scope of Work

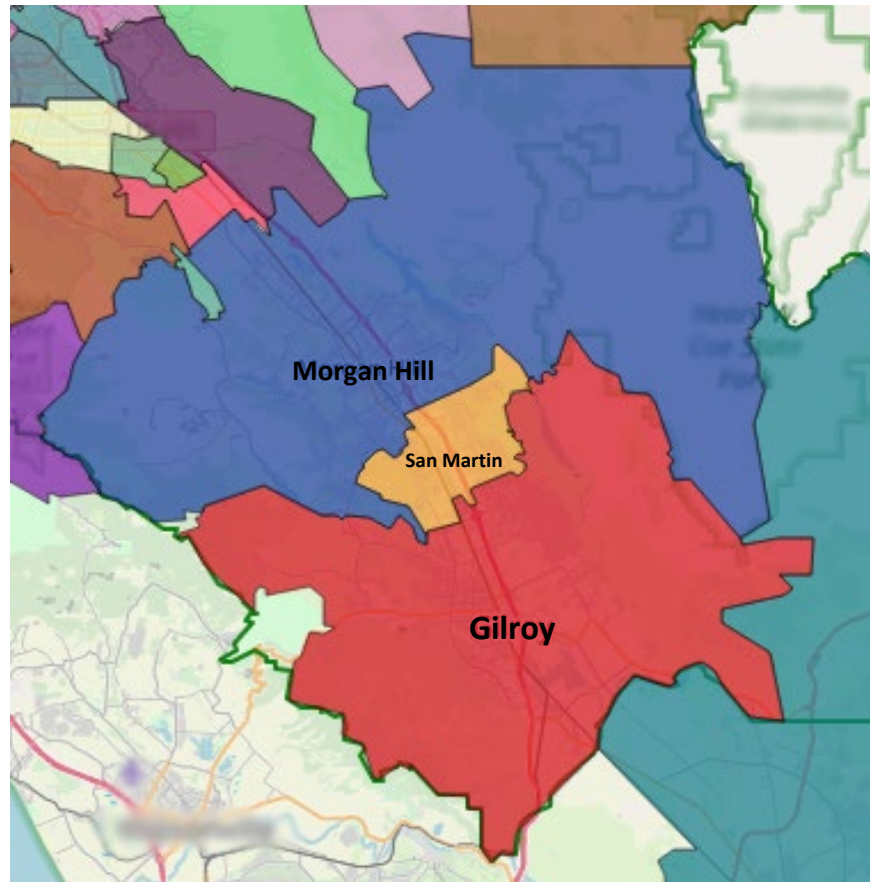
The data used in this report has been confirmed to the extent possible, unless otherwise expressly noted. The general information used in this analysis was obtained from a variety of sources including via local government sources, secondary data contained in HdL's sales & property tax databases, information from hospital and healthcare sector studies, along with interviews with local and regional real estate professionals. Specific information regarding the proposed sites profiled in this report was obtained from the City of Morgan Hill. Market data was secured through information obtained from the California Office of Statewide Health Planning and Development (OSHPD), CoStar, as well as interviews/research on the competitive market hospitals.

During the preparation of this market study, the following scope of work was undertaken by HdL ECONsolutions:

- Discussed the proposed sites with the client (the City of Morgan Hill and developers) in order to clearly understand the development possibilities for the study areas and possibilities for any medical/healthcare-related developments.
- Conducted an evaluation of the potential sites and possible surrounding developments in order to assess the suitability of any site for any proposed hospital or healthcare development, as well as to assess the competitive advantages and disadvantages.
- Analyze relevant economic trends, general market conditions, and the state of the specific market factors having a direct impact on medical/healthcare demand within Morgan Hill/Santa Clara County competitive marketplace, including trends related to the area employment, demographics, and the various attractions and amenities of the Silicon Valley area.

The scope of work evaluates the demand for new medical/healthcare uses in light of demand generators, including existing healthcare competition, performance of existing medical/healthcare marketplace and growth of healthcare service area population and county economic climate.

Market Area Analysis



The relative success of a hospital, medical clinic, or medical office is influenced by the interaction of various basic forces including government, social trends and economic conditions. The purpose of this section is to identify factual data regarding these forces within the market area and to analyze their impacts on real property performance levels – in particular, that of the proposed/potential medical/healthcare property. Primary sources of data include SiteSeer Technologies, Grand View Research, Hospital Council of Northern and Central California, and California Office of Statewide Health Planning and Development (OSHPD).

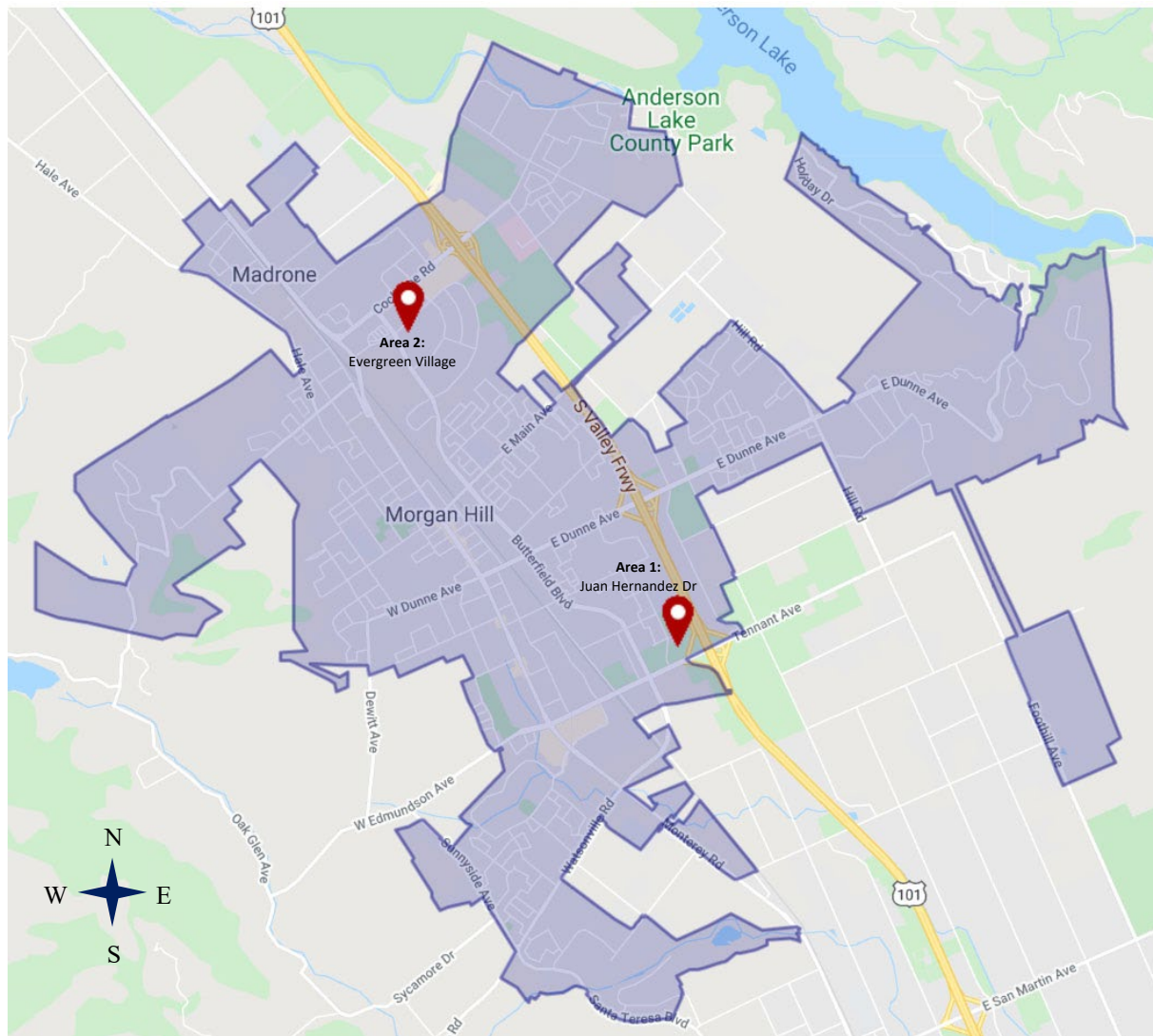
Strong economic development efforts and proper planning have helped position Morgan Hill as a prosperous market area for overall development during the wave of economic expansion being witnessed throughout the Silicon Valley region. As the region continues to see success with a healthy retail marketplace, quality development areas have become scarce, necessitating developers to seek opportunities for redevelopment projects, including the development of new smaller hospitals and out-patient medical and rehabilitation uses.

Morgan Hill is located in southern Santa Clara County, approximately 12 miles south of San Jose, 10 miles north of Gilroy, and 15 miles inland from the Pacific Coast. Visitors to the area can easily access the two proposed sites being targeted for new medical/healthcare uses, via U.S. Highway 101, a major highway which runs north/south and connects with major San Francisco Bay Area Interstates 680, 880, and 280 to the north and Highway 152 which connects Morgan Hill to cities east/west.

The analysis that follows will profile two separate sites in the City of Morgan Hill:

- Area 1 at Juan Hernandez Drive between Tennant & Barrett Avenues, just west of U.S. Highway 101
- Area 2 at Evergreen Village at Butterfield Boulevard and Cochrane Road

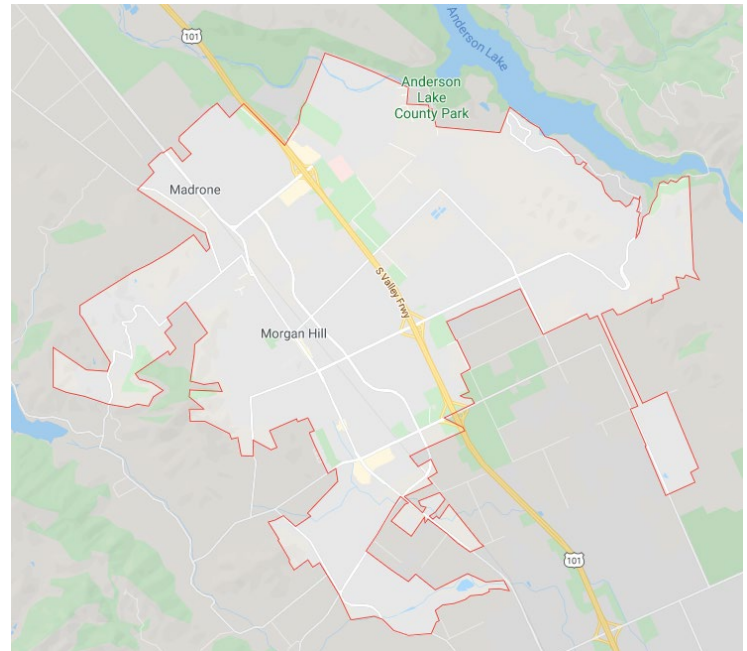
The sections following will provide additional details of the basic market analysis of the City of Morgan Hill in its entirety, as well as a larger market area to be known as the Morgan Hill Service Area (MHSA) to include Morgan Hill, Gilroy, and San Martin.



Morgan Hill/MHSA Community Profile

The City of Morgan Hill, California encompasses approximately 13-square miles within Santa Clara County. Its built environment is framed in part by topography and agricultural history. Today, the City of Morgan Hill offers a mix of a bustling historic downtown, rolling hills, vineyards, and a growing business ecosystem including advanced manufacturing and innovation businesses, retail, hospitality, and healthcare.

Morgan Hill is strategically located in the southern area of the Silicon Valley, with easy access to San Jose and other South Bay cities by car, and weekday Caltrain service to the San Francisco area.



Demographics, Economy, And Employment

The following table illustrates the recent population and household data for the MHSAs of Morgan Hill, Gilroy, San Martin, as well as Santa Clara County.

	City of Morgan Hill	City of Gilroy	City of San Martin	Santa Clara County
2019 Population	44,661	56,373	7,193	1,921,747
5-Year Pop Projection	47,063	58,941	7,177	1,960,182
Households	14,431	16,389	2,121	655,732
5-Year HH Projection	15,201	17,134	2,117	668,847
Average HH Income	\$149,324	\$115,447	\$139,533	\$157,235
Average Age	38.7	36.5	40.8	38.7
Source: SiteSeer Technologies – PopStats 2019 Q4				

Highlights of the market area include:

- The City of Morgan Hill is within close proximity and easily accessible to populations that can exceed 144,000.
- Household growth for the city and for the entire MHSAs is projected to increase by 5% over the next five years with Santa Clara County's growth projected at over 2%.
- Morgan Hill has a strong Average Household Income level of almost \$150,000 which is comparable to the county's average of \$157,235.
- All the general trends are expected to be positive for all the geographic areas studied.

Employment and Economic Base

The following table illustrates the employment profile for the MHSAs of Morgan Hill, Gilroy, San Martin, as well as Santa Clara County. Please note this is before any employment data resulting from the COVID-19 pandemic.

	City of Morgan Hill	City of Gilroy	City of San Martin	Santa Clara County
Daytime Population	42,418	59,936	5,107	2,357,200
Avg Employee Salary	\$74,003	\$69,086	\$73,116	\$80,439
Total Area Employees	18,627	17,919	1,833	1,147,237
Total Area Businesses	1,287	1,244	171	53,687
Source: SiteSeer Technologies – PopStats April 2020				

The following highlights some of the data presented in the above table.

- The average salary in Morgan Hill is the highest in the immediate area and consistent with the County.
- The total daytime population of the MHSAs reaches almost 107,500.
- All the general trends are expected to be positive for all geographical areas studied.

MHSA Industry Types

The largest industry types in Morgan Hill are Other Services (19.7% of establishments), Health Care & Social Assistance (16.2% of establishments), and Retail Trade (11% of establishments).

The largest industry types in Gilroy are Health Care & Social Assistance (18.5% of establishments), Other Services (17.7% of establishments), and Retail Trade (16.2% of establishments).

The largest industry types in San Martin are Other Services (19.1% of establishments), Construction (15.1% of establishments), Health Care & Social Assistance (12.3% of establishments), and Professional, Scientific, & Technical Services (10.5% of establishments).

Current Healthcare Utilization and Services

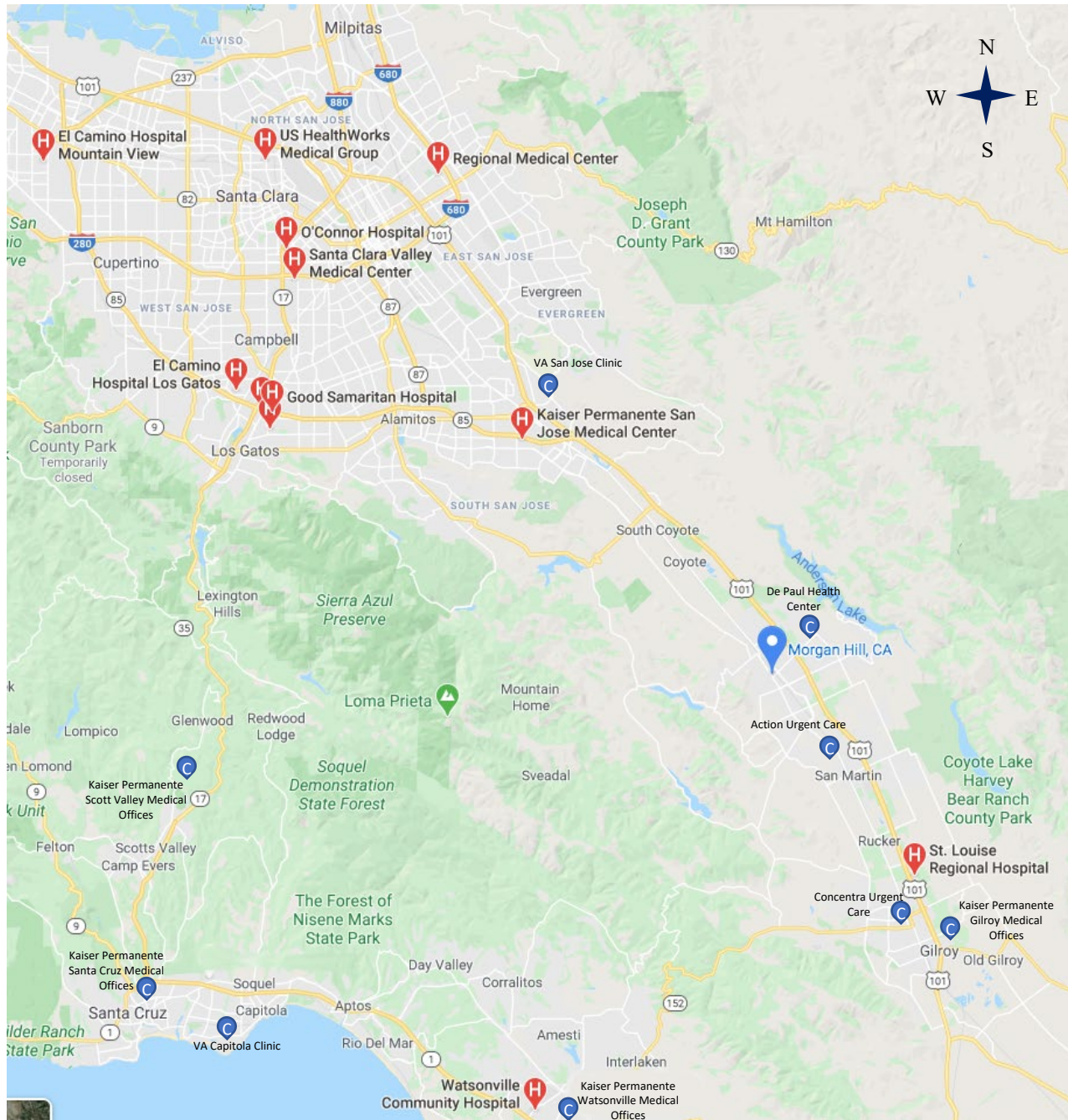
In order to project the future healthcare needs of the MHSAs area populace, it is important to understand the existing healthcare environment, including utilization rates, competitive environment, and existing local providers.

In 2018, Morgan Hill residents generated 43,907 inpatient discharges, resulting in a utilization rate of 424.07 discharges per 1,000 residents. The utilization rate for Morgan Hill alone was higher than the inpatient utilization rate of 364.84 for Santa Clara County.

Morgan Hill			Santa Clara County		
2018 Population	2018 Discharges	Utilization Rate	2018 Population	2018 Discharges	Utilization Rate
43,907	19,940	424.07	1,923,825	721,130	374.84

Sources: Population estimates (STI – PopStats); Patient Discharge Data, Emergency Department Data, and Ambulatory Surgery Data 2018 (OSHPD)

Currently there are several hospitals in the region currently serving Morgan Hill residents and the



The below list represents a sampling of hospitals within the local Submarket. It is not an exhaustive list, but inclusive and reflective of the hospitals and clinics that are within the submarket. Please note only one of the 10 hospitals are within a 10-mile range, which is approximately a 15 to 20 minute drive.

Primary Trade Area Hospital & Clinic Market Sample				
Type	Hospital Name	Licensed Beds*	City	Distance from Morgan Hill
Hospital	St. Louise Regional Hospital	72	Gilroy	10 miles
Hospital	Kaiser Permanente San Jose Medical Center	242	San Jose	14 miles
Hospital	Good Samaritan Hospital	474	San Jose	21 miles
Hospital	San Jose Regional Medical Center	282	San Jose	23 miles
Hospital	El Camino Hospital Los Gatos	443	Los Gatos	24 miles
Hospital	Santa Clara Valley Medical Center	731	San Jose	25 miles
Hospital	Watsonville Community Hospital	106	Watsonville	25 miles
Hospital	O'Connor Hospital	358	San Jose	26 miles
Hospital	Santa Clara U.S. HealthWorks Medical Center	327	Santa Clara	27 miles
Hospital	El Camino Hospital Mountain View	443	Mountain View	34 miles
Clinic	De Paul Health Center	N/A	Morgan Hill	0
Clinic	Action Urgent Care	N/A	Morgan Hill	0
Clinic	Concentra Urgent Care	N/A	Gilroy	10 miles
Clinic	Kaiser Permanente Gilroy Medical Office	N/A	Gilroy	11 miles
Clinic	VA San Jose Clinic	N/A	San Jose	14 miles
Clinic	Kaiser Permanente Watsonville Medical Office	N/A	Watsonville	24 miles
Clinic	Kaiser Permanente Scotts Valley Medical Office	N/A	Scotts Valley	38 miles
Clinic	Kaiser Permanente Santa Cruz Medical Office	N/A	Santa Cruz	40 miles
Clinic	VA Capitola Clinic	N/A	Capitola	48 miles

*Data as of 2016

Definitions

Hospital

A Doctor /Primary Care Provider will refer a patient to the Specialist or Hospital. If it is an Emergency, a patient can go directly to the hospital.

Reasons to go to a Hospital include:

- Emergencies
- An appointment with a Specialist
- Specific medical treatment (Surgery/Operation)

Clinic

A Clinic is a health care center provides routine preventative care when one is healthy or to visit a Doctor/Primary Care Provider when sick. A clinic is smaller than a hospital where patients are less sick and do not stay overnight.

Reasons to go to a clinic or Doctor's office to see a Primary Care Provider/Doctor include:

- Routine medical appointments
- Appointments when sick
- Immunizations

Outpatient Rehabilitation Centers

Outpatient rehab program do not require overnight stay in a facility. One can receive rehabilitative care and treatment through scheduled visits to a private physical therapy practice or clinic. Outpatient rehab programs can last from a day to a week - depending on the condition.

Reasons to go to an outpatient rehabilitation center include:

- Occupational therapy
- Physical therapy
- Speech therapy
- And may also include nutritional counselors, psychologists, and other rehabilitation specialists.

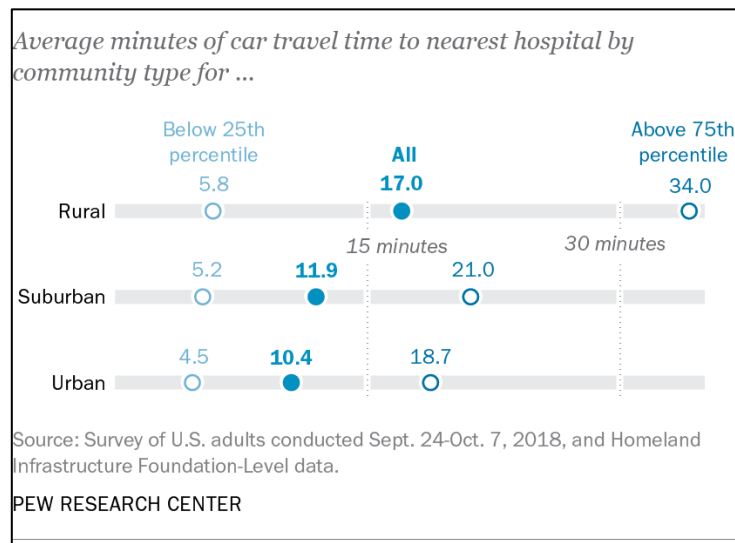
Hospital Facility Planning

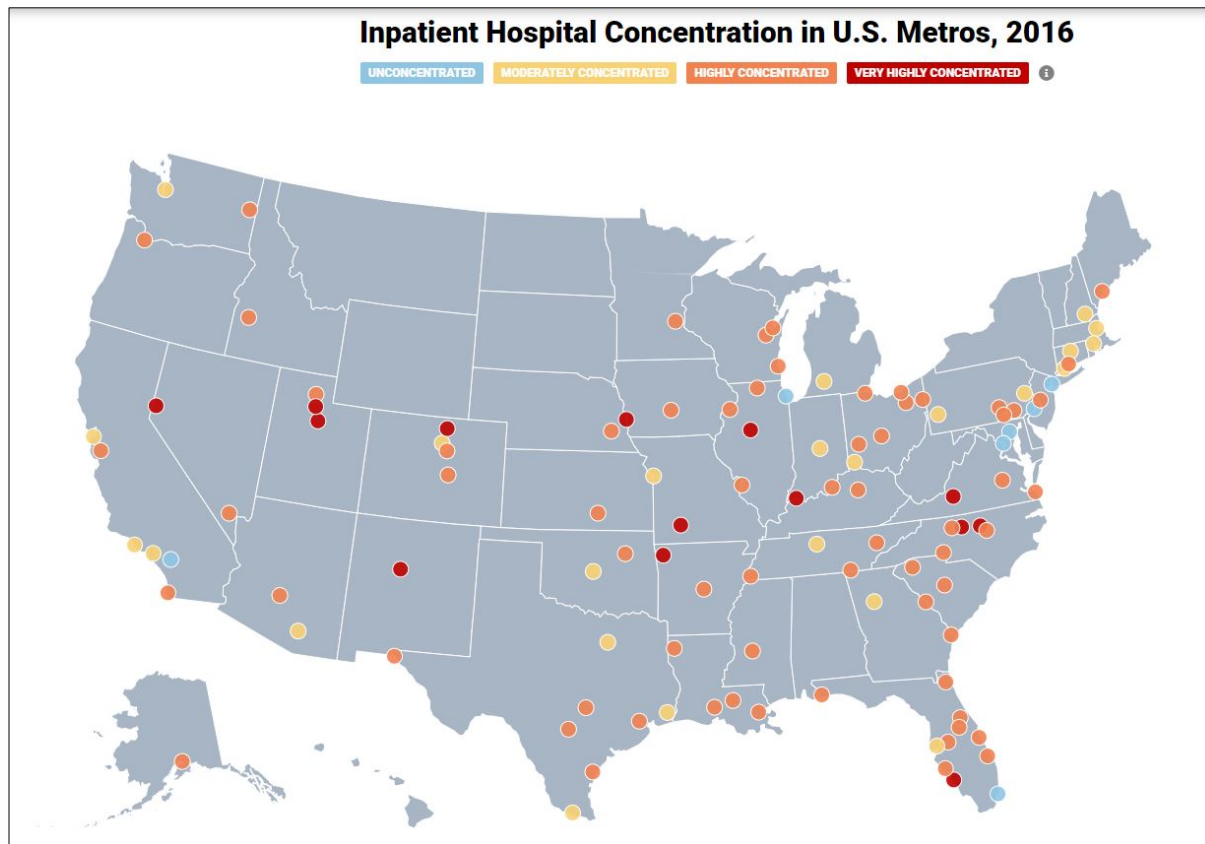
The traditional rule of thumb is 2,500 square feet per bed for overall sizing of a hospital. This benchmark includes all the support spaces necessary to deliver inpatient care, including food, logistics, and diagnostic and treatment areas. It is estimated that a 120-bed community hospital requires approximately 300,000 square feet (2,500 square feet X 120 beds). A 25-bed critical access hospital, however, may need to be more efficient than a benchmark of 62,500 square feet to meet the cost-based reimbursement models.

Additionally, micro-hospitals are small-scale inpatient facilities on two to three-story buildings built on 20,000 to 50,000-square foot spaces that offer a wide range of medical services in a small, neighborhood setting. They commonly have between eight and 10 beds where patients can be observed or admitted for a short stay. Many health systems such as SCL Health and Dignity Health are using micro-hospitals to expand their services and fill gaps in markets where there is not enough demand to support a traditional hospital.

Trade Area Hospital Sample Analysis

From analysis of the demand emanating from the City of Morgan Hill, it is our opinion that any proposed hospital and/or medical/healthcare facilities sites in the City of Morgan Hill would compete primarily for demand generating from a drive-time area of 15-minutes. This is supported by data collected by the Pew Research Center indicating the average drive time to the hospital in a suburban area is approximately 15 minutes.





Source: Healthcare Cost Institute

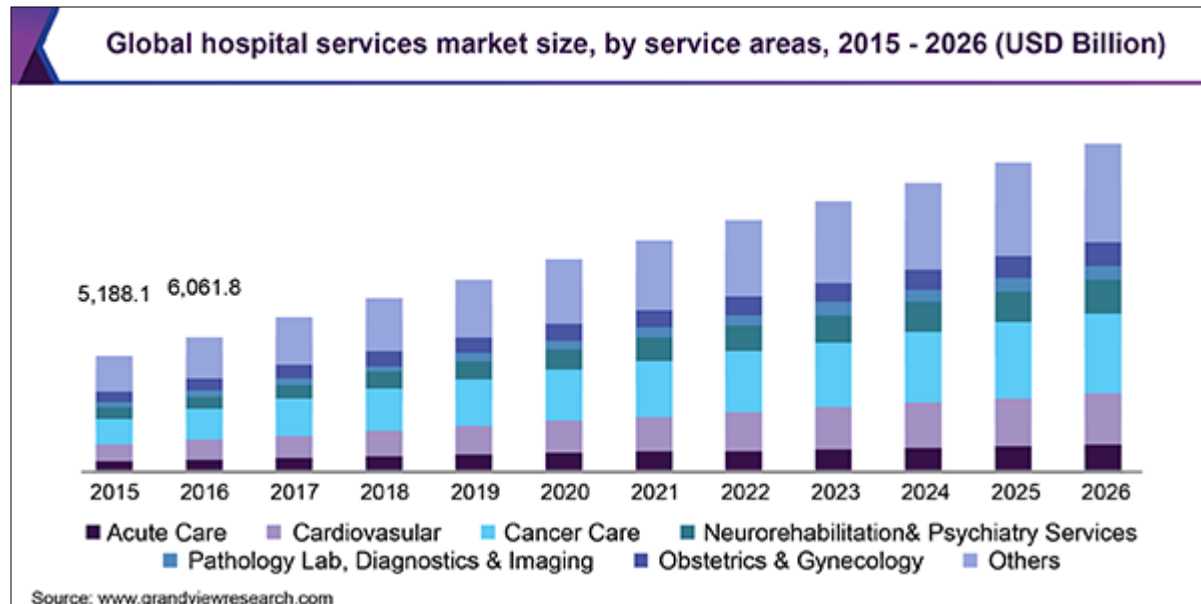
Healthcare Industry

Based on data research by Grand View Research, a market research and consulting company, healthcare services are the largest shareholders of the healthcare industry. Pharmaceutical companies, medical devices sector, term care services, healthcare facility management services, and medical consumables industry together contribute toward the healthcare services market. Even as an end-use segment, hospitals have the largest consumer base within the healthcare industry.

Hospitals, therefore, are an integral part of the healthcare sector and are a major revenue source for the entire industry, which fuels research and innovation. Hospital services include the cost of equipment and ancillary services, but primarily involve service costs of healthcare professionals. Besides personnel cost, healthcare services also include the revenue from hospital disinfection services, asset maintenance costs (repairs of equipment and infrastructure), and other costs.

Service Area Insights

Hospital service areas are segmented by medical conditions into acute care, cancer care, cardiovascular, neurorehabilitation & psychiatry services, pathology lab diagnostics & imaging, obstetrics & gynecology, and others. Each service area covers a significant condition for a demographic and observes major diseases/conditions with high prevalence.



Service Type Insights

Based on type, the hospital services market has been classified into inpatient and outpatient services. The outpatient market is expected to grow in the future as a result of development in communication technology allowing for remote consultation procedures.

Significant cost and time to develop hospitals is shrinking the size of new hospitals and incorporating more outpatient medical services into non-hospital settings. Incorporating urgent care outpatient medical/healthcare uses into non-traditional hospitals and/or retail environments is more common. According to International Council of Shopping Centers (ICSC), urgent-care clinics are cropping up in urban, rural and secondary areas, as Americans seem intent on avoiding hospital emergency rooms and other expensive alternatives. Urgent care and other medical users are being accommodated in neighborhood shopping centers and shopping malls.

The global hospital services market size is expected to reach USD 14.8 Trillion by 2026, according to a new report by Grand View Research, Inc., exhibiting a CAGR of 8.1%. Growing incidence of cancer & other chronic diseases and high cost of treatment are expected to be the vital impact rendering drivers for the market.

Key suggestions from the report:

- Outpatient services is expected to be the fastest growing hospital service type over the forecast period, at a CAGR of 8.5%
- As per analysis of hospital industry, private hospitals are expected to lead the market among state owned and community hospitals, as increasing consumer affordability and lucrative facilities provided by private hospitals attract more patients globally.
- North America was the leading hospital services market in terms of hospital revenue and is expected to maintain its position during the forecast period, as the region has the most expensive healthcare service providers in the world.

U.S. News estimates that nearly 2 million hospital inpatients a year face the prospect of surgery or special care that poses either unusual technical challenges or significantly heightened risk of death or harm because of age, physical condition or existing conditions.

Demand Generators

Based on a 2017 Economic & Health Impact of Hospitals report, commissioned by the Hospital Council of Northern and Central California, hospitals and other health care facilities in Santa Clara County provide a wide variety of employment opportunities. The wages and salaries for the health care professionals employed by these entities are 40 percent to 60 percent higher than the average wage earner in Santa Clara County.

The projected growth for jobs in Santa Clara County from 2014 to 2024 is much greater in health care compared to all employment growth. Employment projections reflect 1.3 percent annual expected growth in Santa Clara County for all employment over this period. Health care-related jobs, in contrast, are projected to grow by 1.7 percent to 1.8 percent annually, greatly exceeding total employment growth. The health care sector in Santa Clara County is showing great gains in the sector's relative importance to the County's economy. Ranked second largest sector, its employment level is 80 percent of the largest sector level (2015), up from 72 percent in 2010. Employment in the health industry is more stable and less cyclical.

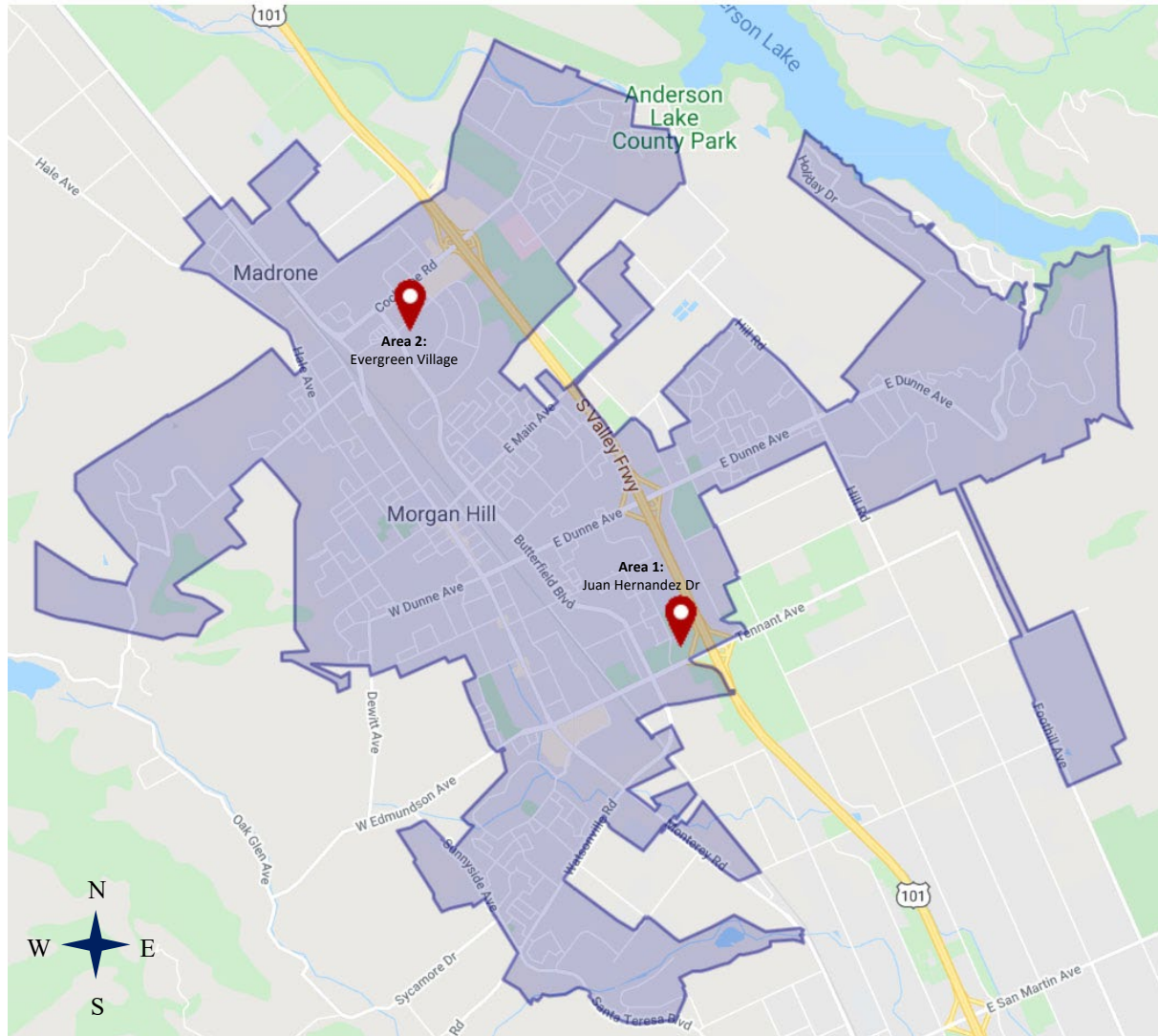
While some job losses occurred during the latest recession, the industry bounced back more than the overall County economy, with post-recession growth exceeding all industries. Hospitals in Santa Clara County provide approximately \$4 billion annually in charity care, Medi-Cal shortfall and a wide range of other community benefits. The County's hospitals will fuel the construction industry over the next three to five years, generating up to \$2.6 billion in total economic impacts, \$1 billion in labor earnings and 13,722 construction-related jobs.

Promoting Prevention and Wellness Programs

Not only do hospitals serve patients in emergencies and for specific medical treatments, but many hospitals and medical/healthcare facilities include prevention and wellness programs for the community. For example, Kaiser Permanente South Bay has partnered with the Public Health Institute to implement the California Project LEAN (Leaders Encouraging Activity and Nutrition) program. California Project LEAN works to advance nutrition and physical activity policies in schools and communities to prevent obesity and other chronic diseases. Efforts focus on youth and parent empowerment approaches, policy and environmental change strategies, and community-based solutions that improve nutrition and physical activity environments, primarily in low-resource, high-need communities. Project LEAN is involved with the Alum Rock, Gilroy, Morgan Hill, and San Jose Unified school districts.

Site Evaluation

The following areas within the City of Morgan Hill have been identified as possible sites for medical/healthcare development possibilities. According to the Market Area Analysis overall the submarket exhibits demand and indicates sustainable conditions.



Locations

The City is considering two sites to be evaluated as future medical/healthcare development sites. It is important to note that while the City does not own these properties, they are able to work with the property owners and potentially participate in facilitating the development process at these locations. Further analysis and due-diligence will need to be conducted by the developer. For this analysis however, we have provided a revenue analysis and project proforma for a prototypical medical/healthcare development that could be developed within the City of Morgan Hill. The below sites are discussed in more detail.

Area 1: Juan Hernandez Drive between Tennant & Barrett Avenues



The approximately 4-acre site consists of large vacant parcels and is conveniently located off US 101 at the Tennant Avenue off-ramp, one of three major highway interchanges in Morgan Hill. Immediately to the north is Barrett Elementary School, to the west is residential, and to the far south is Bethel Baptist Church.

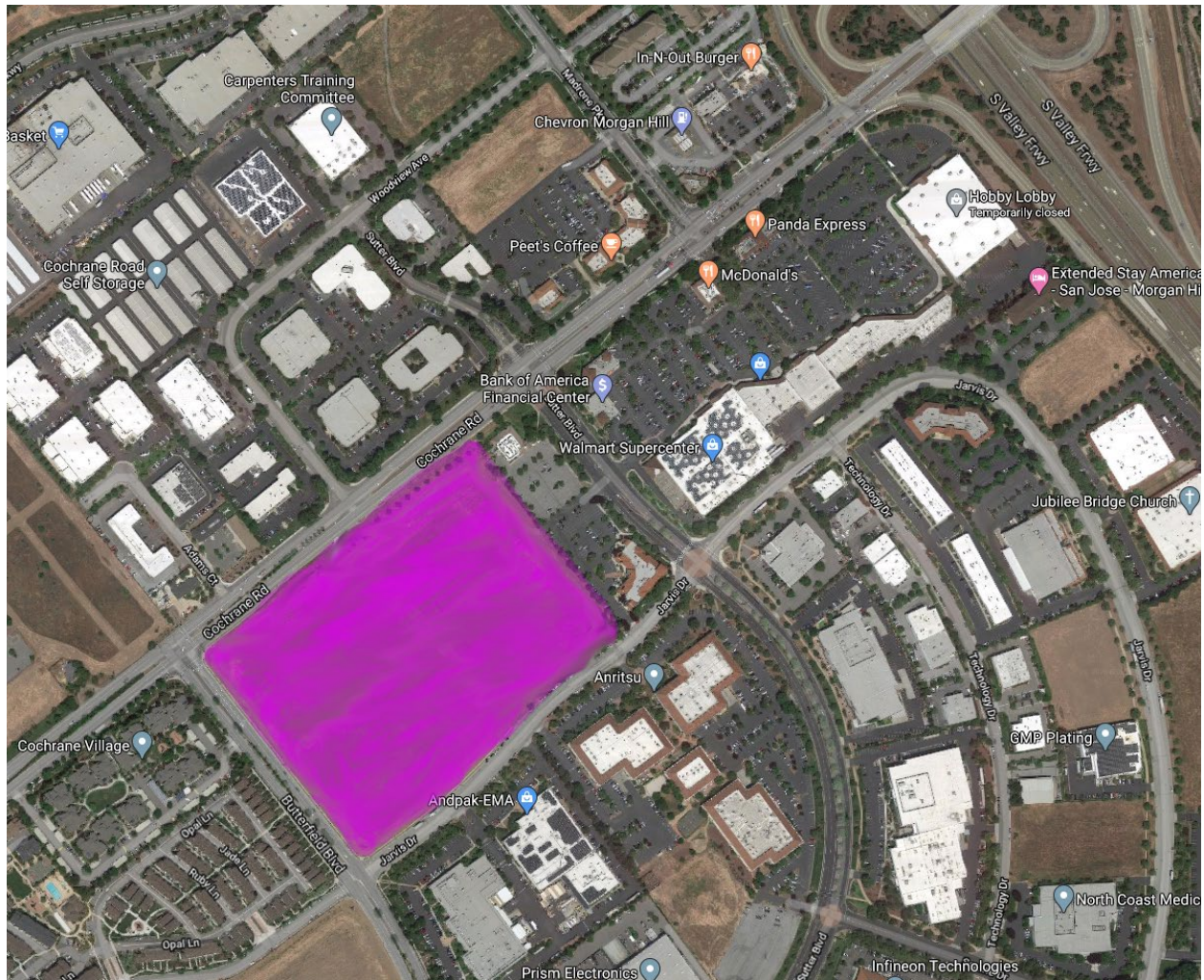
The proposed project on the site includes a hospital/medical use with multifamily residential development providing a buffer to the existing single-family residential neighborhood to the north and access on Juan Hernandez Drive.

Camino Ear, Nose & Throat Clinic currently occupies a small medical office building on a property shared with other medical providers, including Morgan Hill Imaging, South Valley Neurology and Advanced Orthopaedics.

This is an ideal site for a small hospital as it is a large contiguous lot located immediately off a major highway. The property configuration is such that parking, patient loading and unloading can be located along the off-ramp frontage and away from the residential area to the north-west.

Preliminary plans for Lillian Commons have been submitted to the City of Morgan Hill for development of the 4-acre site with a 55-bed hospital, 10,000 s.f. medical office building, 4,000 s.f. urgent care facility, and 10,000 s.f. of supporting commercial retail space, plus 200 multifamily residential units.

Area 2: Evergreen Village at Butterfield Boulevard and Cochrane Road



Evergreen Village is a proposed 20-acre commercial center that has a variety of uses planned. The Evergreen Village plan allows for commercial businesses to own or lease various parcels with the footprint bounded by Butterfield Blvd and Cochrane Road. A range of uses including retail, financial services, medical, lodging and professional offices are envisioned.

This is a good location on a major commercial corridor with nearby retail centers, immediately off US 101. The site has excellent visibility and exposure along Cochrane Road, one of Morgan Hill's major thoroughfares. This area is also serviced by VTA Bus Routes 87 and Express 121.

The site is ideal for medical/healthcare uses as it is a large contiguous property, located immediately off a major highway and on a major thoroughfare. The property is surrounded by commercial and industrial uses, and is in close proximity to residential areas.

Kaiser Permanente is working with Evergreen DevCo to incorporate an approximately 10 to 12-acre project into the Evergreen Village project that will include a medical office building and urgent care facility.

According to Kaiser officials, more than 50% of Morgan Hill residents are Kaiser Permanente members, but presumably have to travel to the busy Gilroy or San Jose offices for Kaiser services.

Concluding Remarks

Hospitals, clinics, and medical/healthcare facilities play a critical role in the community. Not only do these institutions provide necessary medical care, but they also promote prevention and wellness programs, and many times serve as major employers for a community.

What makes some locations for hospitals and/or medical/healthcare more feasible than others? The selection of a site, market area, and community are important to the success of a medical/healthcare development. However, the reasons that hospitals and medical/healthcare facilities are built are as varied as the people that make these decisions. One major reason to build a hospital is very simple, one is needed to satisfy market demand. With Morgan Hill being strategically located at the southern end of Santa Clara County, with the cities of Gilroy and San Martin included in the MHSA, the sites profiled in this report are ideal locations to serve the residents and daytime populations of these communities, especially Morgan Hill.

The development of both of these projects will produce positive benefits to the City of Morgan Hill through the creation of new jobs in the community, along with creating new medical and healthcare opportunities for Morgan Hill residents in the community rather than subjecting residents to drive to Gilroy, San Jose or other communities medical/healthcare needs. The creation of new employment opportunities within Morgan Hill for medical and healthcare jobs produces good paying white collar jobs that will also produce indirect revenues within the city in the form of consumer spending in the community, as well as business to business transactions. Additionally, since more than half the residents of Morgan Hill are Kaiser Permanente members, locating new Kaiser facilities in Morgan Hill makes great sense for the community.

The sites profiled in this report are viable options that have interested landowners with parcels suitable for medical/healthcare development. Since HdL ECONSolutions profiled two sites, for the purposes of this analysis we have also considered the general 15-minute drive time trade area to sufficiently understand the local serving populace. Further study is recommended should the developments in this report move forward. Once a development concept is solidified for the site, we recommend:

- *An Economic Impact Study* – to determine the potential benefit the development of the two sites will have on the local community, including revenue projections for property tax, sales tax and indirect revenues.

Recommendations

Based on economic drivers, community growth in various industries and analysis of hospital and medical/healthcare market demand in the MHSA, along with considerations for the two possible locations for new developments in the City of Morgan Hill, HdL ECONSolutions believes that there is market demand for a small new hospital (40 to 65 beds), along with supporting medical/healthcare uses including a clinic, urgent care, outpatient specialty services and other facilities in the near-term (1 to 3 years) in the City of Morgan Hill.

Both locations are easily accessible for the residents and daytime population of the cities of Morgan Hill, Gilroy, and San Martin.

Recommended Hospital Concepts		
Location	Facility Type	Concept
Area 1: Juan Hernandez Drive between Tennant & Barrett Avenues	Small (55-bed) Hospital, Clinic, Urgent Care, Medical Office Building	Unknown hospital operator
Area 2: Evergreen Village at Butterfield Boulevard and Cochrane Road	Clinic, Urgent Care, Medical Office Building	Kaiser Permanente

Assumptions & Limiting Conditions

The following standard conditions apply to market studies, feasibility projections and recommendations by ECONSolutions:

- **Economic and Social Trends** - The consultant assumes no responsibility for economic, physical or demographic factors which may affect or alter the opinions in this report if said economic, physical, or demographic factors were not present as of the date of the letter of transmittal accompanying this report. The consultant is not obligated to predict future political, economic or social trends.
- **Information Furnished by Others** - In preparing the report, the consultant relied on information furnished by other individuals or found in previously existing records and/or documents. Unless otherwise indicated, such information is presumed to be reliable. However, no warranty, either express or implied, is given by the consultant for the accuracy of such information and the consultant assumes no responsibility for information relied upon later found to have been inaccurate. The consultant reserves the right to make such adjustments to the analyses, opinions and conclusions set forth in this report as may be required by consideration of additional data or more reliable data that may become available.
- **Title** - No opinion as to the title of the subject property is rendered. The property is evaluated assuming it to be under responsible ownership and competent management.
- **Hidden Conditions** - The consultant assumes no responsibility for hidden or unapparent conditions of the property, subsoil, ground water or structures that render the subject more or less valuable. No responsibility is assumed for arranging for engineering, geologic or environmental studies that may be required to discover such hidden or unapparent conditions.
- **Zoning and Land Use** - Unless otherwise stated, the subject property is evaluated assuming it to be in full compliance with all applicable zoning and land use regulations and restrictions.
- **Licenses and Permits** - Unless otherwise stated, the property is evaluated assuming that all required licenses, permits, certificates, consents or other legislative and/or administrative authority from any local, state or national government or private entity or organization have been or can be obtained or renewed for any use on which the analysis contained in this report is based.
- **Engineering Survey** - No engineering survey has been made by the consultant. Except as specifically stated, data relative to size and area of the subject property was taken from sources considered reliable and no encroachment of the subject property is considered to exist.
- **Maps, Plats and Exhibits** - Maps, plats and exhibits included in this report are for illustration only to serve as an aid in visualizing matters discussed within the report. They should not be considered as surveys or relied upon for any other purpose, nor should they be removed from, reproduced or used apart from the report.