



CITY OF SURPRISE
Regular City Council Meeting Agenda
16000 N. Civic Center Plaza
Surprise, AZ 85374

Tuesday, January 17, 2017 @ 6:00 PM
COUNCIL CHAMBERS

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A. Call To Order

B. Roll Call

C. Pledge of Allegiance

D. PROCLAMATION AND COMMUNITY ACKNOWLEDGEMENTS

E. City Manager Report:

District Citywide	Presentation recognizing the Arizona Traditions Woodworking Group with a plaque for their volunteer efforts pertaining to the Surprise Arts & Cultural Advisory Commission Mini Baseball Bat Design Contest.	None Bob Wingenroth, City Manager
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F. City Attorney Report:

G. City Clerk Report:

H. Call To The Public:

INSTRUCTIONS: In order to address the City Council, you will need to fill out a Call to the Public Form available at the front counter, and then turn it in to the City Clerk before the meeting begins.

[Download the Call to the Public form](#) (PDF download requires [Adobe Acrobat Reader](#))

[Fill out the Call to the Public form online](#) If submitting form electronically, please submit to City Clerk at least one hour before the meeting start time.

The Call to the Public form is also available at the front counter.

Note: A.R.S. 38-431.01(H) - During this time members of the public may address City Council on any item not on the agenda. At the conclusion of the open call, City Council may respond to criticism, may ask staff to review the matter or may ask that the matter be put on a future agenda. No discussion or action shall take place on any item raised.

Approval of items on the Consent Agenda – all items with an asterisk (*) are considered to be routine matters and will be enacted by one motion and one roll call vote to the City Council. There will be no separate discussion on these items unless a Councilmember requests, in which event the item will be removed from the consent agenda and considered in its normal sequence on the agenda.

I. Regular City Council Meeting Agenda:

Consent Agenda:

1.	District Citywide	Consideration and action pertaining to approval of an	None
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- | | | | |
|---|--|---|--|
| | <u>Intergovernmental Agreement (IGA) with the Arizona Department of Corrections for inmate labor services; Resolution # 2017-05.</u> | Mike Gent,
Public
Works
Director | |
| 2. | District 3 | <u>Consideration and action on a Final Plat of Acoma Court dated December 19, 2016; a property generally located approximately 1,650 feet west of Reems Road, bounded by West Custer Lane to the north, the Calibre Academy of Surprise to the east, West Acoma Drive to the south, and the Legacy Parc Planned Area Development (PAD) to the west.</u> | None
Hobart
Wingard -
Community
Development |
| 3. | District Citywide | <u>Consideration and action pertaining to approval of an amended Intergovernmental Agreement with Maricopa County for acceptance of HOME grant funding in the amount of \$136,692 as part of the Maricopa County Housing Consortium; Resolution # 2017-07.</u> | Approve
Christina
Ramirez |
| 4. | District Citywide | <u>Consideration and action on the meeting minutes of January 3, 2017 Regular City Council Work Session and Regular City Council Meeting.</u> | None
Sherry Ann
Aguilar,
City Clerk |
|
Regular Agenda Item - Public Hearing: | | | |
| 5. | District 3 | <u>Consideration and action pertaining to the annexation of approximately 203.28 acres located generally between Waddell Road, Cactus Road, Cotton Lane and 175th Avenue; Ordinance # 2017-01.</u> | Approve
Robert
Kuhfuss,
Community
Development |
| 6. | District 3 | <u>Consideration and action pertaining to rezoning approximately 181 acres of property generally located between Cotton Lane, 175th Avenue, Waddell Road and Cactus Road from Residential Ranch (RR) to Residential Medium Density 6 DU/Acre Planned Unit Development (RM-6 PUD), Residential Medium Density 9 DU/Acre Planned Unit Development (RM-9 PUD), Residential High Density Planned Unit Development (RH PUD) with Flex Zone, Regional Commercial Planned Unit Development (CR PUD) with and without Flex Zone; and from Residential High Density Planned Unit Development (RH PUD) to Residential Medium Density 9 DU/Acre Planned Unit Development; Ordinance # 2017-03.</u> | Approve
ROBERT
KUHFUSS -
COMMUNITY
DEVELOPMENT |
| 7. | District 3 | <u>Consideration and action pertaining to rezoning approximately 9.9 acres of property generally located at the southeast corner of 175th Avenue and Sweetwater Road from Residential Ranch (RR) to Residential Medium Density 9 DU/Acre Planned Unit Development (RM-9 PUD); Ordinance # 2017-02.</u> | Approve
ROBERT
KUHFUSS -
COMMUNITY
DEVELOPMENT |
| 8. | District 3 | <u>Consideration and action pertaining to approval of the Preliminary Plat entitled, "Magnolia" dated November 28, 2016, an approximately 174 acre property generally located between Cotton Lane, 175th Avenue, Waddell Road, and Cactus Road.</u> | Approve
ROBERT
KUHFUSS -
COMMUNITY
DEVELOPMENT |

9. District 3 [Consideration and action pertaining to approval of the Preliminary Plat entitled, "S.E.C. 175th Ave & Sweetwater" dated November 28, 2016, an approximately 10 acre property located at the southeast corner of 175th Avenue and Sweetwater Blvd.](#) Approve
ROBERT
KUHFUSS -
COMMUNITY
DEVELOPMENT

Regular Agenda Item - Non-Public Hearing:

10. District Internal [Consideration and action to select a Vice-Mayor.](#) None
Sherry Ann
Aguilar, City
Clerk
11. District Citywide [Discussion pertaining to the fiscal year 2016 annual audit and Comprehensive Annual Financial Report, and associated reports.](#) No Action
Lindsey
Duncan,
Finance
Director

J. Other Business and Future Agenda Items:

K. Mayor/Council Reports:

L. Executive Session:

12. District Internal [Consideration and action to enter into executive session for discussions and consultation with staff in order to consider the City Council's position and instruct staff regarding negotiations for the purchase of real property in the proximate vicinity of the Original Town Site pursuant to A.R.S. 38-431.03\(A\)\(7\).](#) None
Robert
Wingo, City
Attorney
13. District Internal [Consideration and action to enter into executive session for discussion and consultation with staff in order to consider the City Council's position regarding contract negotiations and the sale or lease of real property in the proximate vicinity of Surprise City Hall and Surprise Stadium pursuant to ARS 38-431.03\(A\)\(4\) and \(7\).](#) None
Robert
Wingo, City
Attorney

For information Purposes; Upon a public majority vote of a quorum of the City Council, the Council may hold an executive session, which will not be open to the public, but for only the following purposes:

- discussion or consideration of personnel matters (A.R.S. §38-431.03 (A)(1));
- discussion or consideration of records exempt by law from public inspection (A.R.S. §38-401.03 (A)(2));
- discussion or consultation for legal advice with the city's attorneys (A.R.S. §38-431.03 (A)(3));
- discussion or consultation with the city's attorneys regarding the city's position regarding contracts that are the subject of negotiations, in pending or contemplated litigation, or in settlement discussions conducted in order to avoid or resolve litigation (A.R.S. §38-431.03 (a)(4));
- discussion or consultation with designated representatives of the city in order to consider its position and instruct its representatives regarding negotiations with employee organizations (A.R.S. §38-431.03 (A)(5)); or
- discussion, consultation or consideration for international and interstate negotiations or for negotiations

by a city or town, or its designated representatives, with members of a tribal council, or its designated representatives, of an Indian reservation located within or adjacent to the city or town. A.R.S. §38-401.03 (A)(6)).

- discussing or consulting with designated representatives of the city in order to consider its position and instruct its representatives regarding negotiations for the purchase, sale or lease of real property (A.R.S. §38-431.03 (A)(7)).

Confidentiality Requirements Pursuant to A.R.S. §38-431.03(C)(D): Any person receiving executive session information pursuant to A.R.S. §38-431.02 shall not disclose that information except to the Attorney General or County Attorney by agreement of the City Council, or as otherwise ordered by a court of competent jurisdiction.

The council may vote to hold an executive session for the purpose of obtaining legal advice from the Board's attorney on any matter listed on the agenda pursuant to A.R.S. § 38-431.03(A)(3).

M. Adjournment:

SHERRY ANN AGUILAR, CITY CLERK, MMC

POSTED:

SPECIAL NOTE: PERSONS WITH SPECIAL ACCESSIBILITY NEEDS, INCLUDING LARGE PRINT MATERIALS OR INTERPRETER, SHOULD CONTACT THE CITY CLERK'S OFFICE @ 623.222.1200 OR TTY 623.222.1002, BY NO LATER THAN 24 HOURS IN ADVANCE OF THE REGULAR SCHEDULED MEETING TIME.



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

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Council Meeting Date: January 17, 2017

Contact Person: Bob Wingenroth, City Manager

Submitting Department:

District: Citywide

Staff Recommendations: None

Consent

Regular

Public Hearing

Report/Discussion

Agenda Wording:

Presentation recognizing the Arizona Traditions Woodworking Group with a plaque for their volunteer efforts pertaining to the Surprise Arts & Cultural Advisory Commission Mini Baseball Bat Design Contest.

Motion:

N/A

Background:

The Arts and Cultural Advisory Commission is hosting their fourth “Mini Baseball Bat Design Contest” where students throughout the City of Surprise will have the opportunity to participate. Among those students, contest winners will be selected and recognized at a Spring Training Game in March 2017.

In preparation for the contest, the Arizona Traditions Woodworking Group volunteered to remove all the paint and varnish from the donated mini-baseball bats received in Fiscal Year 2016.

Objective Analysis:

No action. Positive effort to recognize the Arizona Traditions Woodworking Group for their volunteer efforts in assisting the Surprise Arts & Cultural Advisory Commission in preparing donated bats for their upcoming "Mini Baseball Bat Design Contest".

Policy Compliant:

This recognition is compliant with City and Council Policy.

Financial Impact:

No financial impact to the city.

Budget Impact:

No budget impact.

FTE Impact:

No FTE impact.

ATTACHMENTS:

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No Attachments Available



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

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Council Meeting Date:	January 17, 2017	Contact Person:	Mike Gent, Public Works Director
Submitting Department:	Public Works	District:	Citywide
Staff Recommendations:	None		

Consent	x	Regular	Public Hearing	Report/Discussion
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Agenda Wording:

Consideration and action pertaining to approval of an Intergovernmental Agreement (IGA) with the Arizona Department of Corrections for inmate labor services; Resolution # 2017-05.

Motion:

I move to approve Resolution # 2017-05.

Background:

The City's current IGA with the Arizona Department of Corrections expired on December 31, 2016. This action item allows the City to renew an updated IGA for inmate labor services associated with weed abatement tasks for un-landscaped City Rights of Way within the City limits.

The tasks normally entail removal of nuisance weeds along City's Rights of Way. The inmates gather the debris by raking and bagging, then lifting the bags into our dump truck where our City employee driver secures the load and at the end of the day, hauls it to the landfill. The inmates also assist with nuisance tree and bush trimming.

Objective Analysis:

This work is accomplished at a lower cost to the City through the use of inmate labor as opposed to use of either in house personnel or another outside contractor.

Policy Compliant:

This action is consistent with City and Council policy.

Financial Impact:

The total estimated annual costs associated with this agreement are approximately \$80,000. Per the agreement, the City will be obligated to pay for inmate labor at a rate of \$0.50 per hour and for supervision of the inmate work crews at a rate of \$18.22 per hour. The City will also pay for transportation costs associated with travel to and from the work sites.

Budget Impact:

The FY2017 annual budget includes funding for inmate labor services within the Highway User Revenue Fund.

FTE Impact:

There is no FTE impact associated with this item.

ATTACHMENTS:

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☐ [Resolution 2017-05](#)

RESOLUTION # 2017-05

**A RESOLUTION OF THE MAYOR AND COUNCIL OF THE CITY
OF SURPRISE, ARIZONA APPROVING AN
INTERGOVERNMENTAL AGREEMENT WITH STATE OF
ARIZONA DEPARTMENT OF CORRECTIONS FOR INMATE
LABOR ASSOCIATED WITH UNLANDSCAPED RIGHT OF WAY.**

WHEREAS, pursuant to Arizona Revised Statute §11-951, *et seq.*, the City of Surprise has the authority to enter into intergovernmental agreements with other governmental entities for the purposes set forth therein;

WHEREAS, the parties desire to enter into an intergovernmental agreement in order to facilitate the use of inmate labor and associated guard service for maintaining the City's un-landscaped Rights of Way; and

WHEREAS, the term of this agreement is expected to be for five years, at which time a new agreement will be negotiated.

NOW, THEREFORE, BE IT RESOLVED by the Mayor and Council of the City of Surprise, Arizona, as follows.

Section 1. The Intergovernmental Agreement between the City of Surprise and the State of Arizona Department of Corrections, in the form attached hereto as Exhibit A, is approved.

Section 2. The City Manager, or his designee, is hereby authorized to execute and submit all documents and other necessary or desirable instruments in connection with said agreement.

APPROVED AND ADOPTED this ____ day of _____, 2017.

Sharon R. Wolcott, Mayor

Attest:

Approved as to form:

Sherry Aguilar, City Clerk

Robert Wingo, City Attorney

EXHIBIT A

INTERGOVERNMENTAL AGREEMENT BETWEEN
THE CITY OF SURPRISE AND STATE OF ARIZONA DEPARTMENT OF
CORRECTIONS

EXHIBIT A

ADC Contract No: 17-026-21

STATE OF ARIZONA
DEPARTMENT OF CORRECTIONS
1645 West Jefferson Street, Mail Code 55302
Phoenix, Arizona 85007-3002

INMATE WORK CONTRACT

This **Contract** is entered into between the **City of Surprise**, hereinafter referred to as the **Contractor**, and the **Arizona Department of Corrections**, for and on behalf of its **Arizona State Prison Complex –Perryville (ASPC-Perryville)**, hereinafter known as the **Department**.

This document, including the Scope of Services, Special Terms and Conditions, Standard Work Provisions, any addendums, attachments or modifications, shall constitute the entire Contract between the parties and supersedes all other understandings, oral or written.

IN WITNESS WHEREOF, the parties hereto agree to carry out the terms of this Contract.

City of Surprise
Federal Tax ID. #866007796

Arizona Department of Corrections

Signature of Authorized Individual

Date

Bob Wingenroth

Typed Name

City Manager

Typed Title

16000 N. Civic Center Plaza
Surprise, AZ 85374

Address

Signature of Authorized Individual

Date

Kenneth P. Sanchez

Typed Name

Deputy Chief Procurement Officer, Procurement
Services

Typed Title

1645 West Jefferson Street, Mail Code 328
Phoenix, Arizona 85007-3002

Address

WITNESSETH

WHEREAS, the Department is duly authorized by A.R.S. § 41-1604, et seq.; § 31-252 and § 31-254, to execute and administer contracts and;

WHEREAS, the Contractor is authorized by A.R.S. § 9-240 to enter into agreements for services, and;

WHEREAS, the Department desires to implement the requirement that each able-bodied inmate under commitment to the Department shall engage in work activity during such term of imprisonment, and;

WHEREAS, the Director of the Department has the authority to maintain and administer facilities and programs as may be required for the custody, control and rehabilitation of all inmates committed to the Department, and;

WHEREAS, the Director of the Department may authorize inmate work crews to perform acceptable tasks in any part of the State, and;

WHEREAS, the Contractor has a need for a labor force to support its general landscaping, grounds keeping, general maintenance and janitorial duties and;

WHEREAS, the Department is able to supply an inmate labor pool to support the above stated scope of work from its Arizona State Prison Complex – Perryville, as identified herein.

NOW, THEREFORE, the Department and the Contractor do hereby agree as follows:

1 THE CONTRACTOR AGREES:

- 1.1 To provide necessary tools/equipment, drinking water, sanitary facilities and any special clothing required to accomplish work assignments.
- 1.2 To appoint a work crew leader who may provide both technical and job supervision as necessary. Appointed supervisors shall abide by and put into operational practice the Standard Work Provision for Inmate Work Programs included as Attachment #1 to this contract.
 - 1.2.1 Technical supervision means the Contractor shall provide staff members who know the types of work tasks to be accomplished and the correct way to complete each task. The technical supervisors shall teach assigned inmates how to complete their job assignments.
 - 1.2.2 Job supervision means that Contractor personnel shall remain with assigned inmates for the length of the work day to ensure inmates are supervised and accounted for, and report results to the Department liaison. If an inmate fails to remain at the work site, if an inmate becomes ill at the work site and needs to be returned to the prison or if an inmate poses security concerns, the Department liaison shall be contacted immediately.
- 1.3 To obtain the Department's written approval for the Contractor's technical supervisor prior to initiation of this contract.
 - 1.3.1 Subsequent to Contract initiation, should the Contractor's technical supervisor(s) change, the Contractor shall notify the Department at least two (2) workdays prior to the impending change to permit completion of the Department's approval process.
 - 1.3.2 If prior notice is not possible, the Department may withhold the inmate work crew from further service until the necessary approval process is completed.

- 1.4 To provide, if applicable, pesticide protection and Hazardous Material Training (HAZMAT) for inmates prior to initiating the work activities described in this Contract.
 - 1.4.1 The Contractor shall comply with the Site Safety and Health Plan included as Attachment #2 of this contract.
 - 1.4.2 Inmates shall not be allowed to be present while hazardous materials, inclusive of pesticides, are being used or applied. Pursuant to the Arizona Office of Pest Management, no inmate shall be allowed to handle or to apply pesticides. However, all hazardous materials (inclusive of pesticides), if stored and/or used on this site, and while ADC staff and/or inmates are present, require they be trained to recognize such hazardous materials and relative adverse medical signs and symptoms associated with the chemical, in accordance with the federal chemical “Right-to-Know Act” (SARA Title III).
- 1.5 To provide a working environment which meets the requirements of the Occupational Safety and Health Act (OSHA), Safety and Health Standards for General and or Construction Industry, 29 CFR Part 1910 and 1926, as adopted by the State of Arizona.
- 1.6 To provide emergency first aid for minor injuries or to contact the nearest medical provider to assist if more extensive first aid services are needed.
- 1.7 The Contractor shall follow all Department Orders (DO’s), and Director’s Instructions (DI’s), i.e. drug-free workplace, grooming code, etc. The policies, procedures, DO’s, and DI’s are available on the following web site www.azcorrections.gov.
- 1.8 To designate a staff member who shall serve as liaison between the Contractor and the Department. The Contractor shall ensure that the Department is given the name and phone number/extension of the contact person.
- 1.9 To request from the Department 24 hours prior to necessity should workload require inmates to stay beyond their normal work hours. Said request shall be provided by contacting the Department’s institution contact person.
- 1.10 To assign work hours, work location(s), and job assignments subject to the concurrence of the Department. Work sites shall be confined to locations which are within the Contractor’s authority to manage, maintain and finance.
- 1.11 To allocate sufficient time from job responsibilities to allow Contractor’s staff assigned to this work program to attend mandatory training given by the Department prior to initiating the work activities described in this Contract. Subsequent to Contract execution, replacement staff assigned to this program must receive Department training prior to assuming work responsibilities.
- 1.12 To maintain the work site in the manner/condition in which it was approved by the Department as complying with the requirements imposed by the custody level of assigned inmates and assigned work responsibilities. If, during the term of this Contract, security/safety concerns become evident, or the Contractor wishes to change or alter the work site(s), the following procedures shall be followed:
 - 1.12.1 Security/safety concerns shall be rectified immediately by the Contractor in accordance with direction received from the Department.
 - 1.12.2 The Contractor shall provide written notice to the Department if changes or alterations are

planned for the work site(s) prior to any changes or alteration being accomplished.

- 1.12.3 Representatives from the Department and the Contractor shall conduct an inspection of the work site(s). If the proposed change or alteration shall negatively impact the security and/or safety of assigned inmate workers, corrective action shall be determined by the Department.
- 1.12.4 If in the opinion of the Department, said security/safety concern(s) poses an immediate threat to the inmate workers, the Department may withhold further assignments of the inmate work crew until the concern is rectified.
- 1.13 To pay for inmate labor at the rate of fifty cents (50¢) per hour, to include approved extra hours, if applicable as authorized by the Department. Work hours include travel time to and from the work site.
- 1.14 To pay for Correctional Officer (CO) supervision of inmate work crews under this Contract, at a rate of **\$18.22 per hour**. Should additional crews be needed, Contractor will hire additional staff to supervise inmate work crews. The Contractor in agreement with the Department must authorize the expense of additional Departmental staff before the expense is incurred.
- 1.15 In addition to payment for inmate labor and CO overtime, the Contractor shall pay the Department for transportation costs at the State prevailing rate per mile, as determined by the Arizona Department of Administration, General Accounting Office, for distance traveled by each Department transportation vehicle to and from the work site(s). Such payment shall be rendered by separate check or warrant at the same time and place as payment for inmate wages.
- 1.16 The Contractor shall make payment for all work performed on a bi-weekly basis. The check or warrant shall be made within five (5) business days after receipt of an invoice, payable to Arizona State Prison Complex – Perryville and sent to the following address:
- Arizona State Prison Complex – Perryville (623) 853-0304
Attention: Business Manager
- | <u>Physical Address</u> | <u>Mailing Address</u> |
|-------------------------|------------------------|
| 2455 North Citrus Road | P.O. Box 3000 |
| Goodyear, AZ 85395 | Goodyear, AZ 85395 |
- 1.17 To maintain records and other evidence sufficient to reflect properly all payments related to this work program. Such records shall be made available for inspection and audit upon request by the Department.
- 1.18 That inmates assigned to this work program **shall not** drive any licensed, over-the road vehicle as part of their job responsibilities. However, assigned inmates may be permitted to operate the Contractor's off-road mobile equipment, in accordance with the following guidelines.
- 1.18.1 The Contractor shall provide written notice to the Department advising of the need to have inmates operate mobile equipment. The notice shall describe the type(s) of off-road mobile equipment to be operated in accordance with Attachment #3.
- 1.18.2 No inmate shall operate any mobile equipment until the Contractor receives written authorization from the Department in accordance with Attachment #3.
- 1.18.3 If the Contractor receives written authorization from the Department, the Contractor shall

document training provided to inmates specific to each type of off-road mobile equipment to be operated.

1.18.4 Acquire and maintain applicable insurance in compliance with State requirements.

1.18.5 Designated off-road mobile equipment may be:

1.18.5.1 Riding lawnmowers and golf carts or similar type equipment.

2 **THE DEPARTMENT AGREES:**

- 2.1 To provide a mutually agreed number of inmates, subject to availability of said work force, to support the Contractor's Public Works as agreed between the Department and Contractor. Dependent upon the availability of inmate labor, the Department shall provide two (2) work crews with a minimum of ten (10) inmates per crew. In the event that the minimum number of inmates per crew cannot be met, the Department shall contact the Contractor's representative prior to the start of the work day to determine the feasibility of sending the two (2) work crews with less than ten (10) inmates, or combining the remaining available inmates into one (1) work crew.
- 2.2 Inmates classified as sexual predators/offenders **shall not** be utilized for this public works Contract.
- 2.3 That work assignments shall be performed at the Contractor's business location(s) as shown on Attachment No. 4.
- 2.4 To provide transportation of inmate workers to and from selected work site(s) in Department owned vehicles. Inmate workers shall not be transported in privately owned vehicles at any time.
- 2.5 To provide sack lunches for inmates and furnish all clothing, except special protective clothing or footwear.
- 2.6 To provide security supervision of inmate workers in accordance with Department written instructions.
- 2.7 When mutually agreed to by the Department and the Contractor: to provide a Correctional Officer (CO) who shall remain on site to provide security supervision of the inmate workers each workday. The assigned CO shall follow Department notification procedures if:
 - 2.7.1 An inmate fails to remain at the work site.
 - 2.7.2 An inmate has an accident or becomes seriously ill at the work site.
- 2.8 To remove and replace as soon as possible any inmate who does not perform to the satisfaction of the Contractor.
- 2.9 To approve/disapprove the Contractor's technical supervisor(s) assigned to this work program in accordance with Department written instructions.
- 2.10 To present training to Contractor's staff who will be involved in supervising or interacting with inmate workers. This training shall be given **prior** to initiating the work activities described in this Contract. Subsequent to Contract execution, replacement staff assigned to this work program must receive Department training prior to assuming work responsibilities.
- 2.11 To keep the Contractor fully informed of Department written instructions and activities that have

bearing upon the Contractor fulfilling assigned obligations under this Contract.

- 2.12 To designate an institutional contact person who shall function as a liaison between the Institution, Department and the Contractor in developing and coordinating work schedules, assignments, hours and transportation. The Department shall ensure the Contractor is given the name and telephone number/extension of the contact person.
- 2.13 To ensure that any inmate(s) who drives the Contractor's off-road mobile equipment as an assigned work duty is in compliance with Department written instructions governing the use of inmate drivers.
- 2.14 That prior to the initiation of this work program, the proposed work site shall be inspected relative to security and safety concerns to ensure the work environment satisfies all requirements imposed by custody level of assigned inmate workers and assigned work responsibilities. If, during the term of this Contract, security or safety concerns should become evident, or the Contractor wishes to change or alter the work site, the procedure described in Section 1.12 of this Contract shall be followed.
- 2.15 To invoice the Contractor for payments due no later than the fifth (5th) business day of each month. Invoices shall identify the following:
 - 2.15.1 Inmate name and ADC number
 - 2.15.2 Hours worked
 - 2.15.3 Rate of pay
 - 2.15.4 Mileage (if applicable)
 - 2.15.5 Vehicle repair expense (if applicable)
 - 2.15.6 Total amount invoiced
- 2.16 Invoices for CO supervision shall identify at a minimum the following:
 - 2.16.1 CO name(s)
 - 2.16.2 CO hours worked including overtime hours, if applicable
 - 2.16.3 Total amount invoiced
- 2.17 That invoices shall be sent to the Contractor at the following address:

City of Surprise
Attention: Bob Wingenroth
16000 North Civic Center Plaza
Surprise AZ, 85374

3 SPECIAL TERMS AND CONDITIONS

- 3.1 Term of Contract This Contract is expected to commence with the expiration of the current Contract, in effect through December 31, 2016 and shall continue for a period of five (5) years thereafter, unless terminated, canceled or extended as otherwise provided herein.
- 3.2 Per Department Procurement Policies, this Contract may not be extended past the initial (5) year term.
- 3.3 This Contract may be terminated, without cause, by either party by submission of written notice to the other. Such Notice of Termination shall be effective thirty (30) calendar days after mailing by certified mail, return receipt requested, to the other party.
- 3.4 Circumstances may arise during the term of this Contract which may prohibit the assignment of inmates for work assignments. Such circumstances could include acts of nature, institution riots, lockdowns, inmate work strikes, etc. The following guidelines shall govern, if such circumstances should occur:
- 3.4.1 The Department shall provide verbal notice within 24 hours to the Contractor if circumstances will impact work activities.
- 3.4.2 The Contractor shall not hold the Department liable for failure to perform, or in default of Contract terms due to circumstances described above.
- 3.5 Inmates working under this Contract are not employees of the Contractor and any compensation is provided solely pursuant to A.R.S. § 31-254.
- 3.6 Non-Availability of Funds In accordance with A.R.S. § 35-154, every payment obligation of the State and Town under this Contract is conditioned upon the availability of funds appropriated or allocated for payment of such obligation. If funds are not allocated and available for the continuance of this Contract, this Contract may be terminated by the State or Town at the end of the period for which funds are available. No liability shall accrue to the State or Town in the event this provision is exercised, and the State or Town shall not be obligated or liable for any future payments or for any damages as a result of termination under this paragraph.
- 3.7 Cancellation for Conflict of Interest In accordance with A.R.S. § 38-511, State or Town may within three years after execution cancel the Contract, without penalty or further obligation, if any person significantly involved in initiating, negotiating, securing, drafting or creating the Contract on behalf of the State or Town, at any time while the Contract is in effect, becomes an employee or agent or any other party to the Contract in any capacity or a consultant to any other party of the Contract with respect to the matter of the Contract.
- 3.8 The Department reserves the right to terminate the contract for default in whole or in part due to the failure of the Contractor to comply with any term or condition of the Contract, to acquire and maintain all required insurance policies, bonds, licenses and permits. The Department shall provide written notice of the termination and the reasons for it to the Contractor.
- 3.9 Changes to the Contract shall be handled by formal amendment through Procurement Services.
- 3.10 Arbitration In accordance with A.R.S. § 12-1518, the parties agree to resolve all disputes arising out of or relating to this Contract through arbitration, after exhausting applicable administrative review except as may be required by other applicable statutes.

- 3.10.1 Records which relate to disputes, litigations or the settlement of claims arising out of the performance of this Contract, or to cost and expenses of this Contract as to which exception has been taken by either party, or their designees, shall be retained by the parties until such appeals, litigations, claims or exceptions have been finally resolved.
- 3.11 Applicable Law In accordance with A.R.S. § 41-2501, et seq. and AAC R2-7-101, et seq. Contract shall be governed and interpreted by the laws of the State of Arizona and the Arizona Procurement Code.
- 3.12 Non-Discrimination In accordance with A.R.S. § 41-1461, Contractor shall provide equal employment opportunities for all persons, regardless of race, color, creed, religion, sex, age, national origin, disability or political affiliation. Contractor shall comply with the Americans with Disabilities Act.
- 3.13 Each party to this contract shall be responsible for any and all costs, including but not limited to, attorney fees, court costs and other litigation expenses incurred as a result of the errors and omissions of its officers, employees, agents, or assigns arising out of the performance of this contract.
- 3.14 Audit of Records In accordance with A.R.S. § 35-214, the Contractor shall retain and shall contractually require each subcontractor to retain all data, books and other records (“records”) relating to this Contract for a period of five years after completion of the Contract. All records shall be subject to inspection and audit by the State at reasonable times. Upon request, the Contractor shall produce the original of any or all such records.
- 3.15 Any and all notices, requests or demands given or made upon the parties hereto, pursuant to or in connection with this Contract, unless otherwise noted, shall be delivered in person or sent by United States Mail, postage prepaid, to the parties at their respective addresses as shown on the signature page of this document.
- 3.16 Third Party Antitrust Violations The Contractor assigns to the State any claims for charges resulting from antitrust violations to the extent that such violations concern materials or services supplied by third parties to the Contractor.
- 3.17 Notice Warning Any person who takes into or out of or attempts to take into or out of correctional facility or the grounds belonging to or adjacent to a correctional facility, any item not specifically authorized by the correctional facility, shall be prosecuted under the provisions of the Arizona Revised Statutes. All persons, including employee and visitors, entering upon these confines are subject to routine searches of their persons, vehicles, property of packages.

Definition: A.R.S. § 13-2501:
 A.R.S. § 13-2505:
 ADC Department Order 708

3.18 Unlawful Sexual Conduct

- 3.18.1 A person – who is employed by the State Department of Corrections or the Department of Juvenile Corrections; is employed by a private prison facility or a city or county jail; Contracts to provide services with the State Department of Corrections, the Department of Juvenile Corrections, a private prison facility or a city or county jail; is an official visitor, volunteer or agency representative of the State Department of Corrections, the Department of Juvenile Corrections, a private prison facility or a city or county jail – commits unlawful sexual conduct by intentionally or knowingly engaging in any act of a sexual nature with

an offender who is in the custody of the State Department of Corrections, the Department of Juvenile Corrections, a private prison facility or a city or county jail or with an offender who is under the supervision of either Department or a city or county

- 3.18.2 This section does not apply to a person who is employed by the State Department of Corrections, a private prison facility or a city or county jail or who Contracts to provide services with the State Department of Corrections, a private prison facility or a city or county jail or an offender who is on release status if the person was lawfully married to the prisoner or offender on release status before the prisoner or offender was sentenced to the State Department of Corrections or was incarcerated in a city or county jail.
- 3.18.3 Unlawful sexual conduct with an offender who is under fifteen years of age is a class 2 felony. Unlawful sexual conduct with an offender who is between fifteen and seventeen years of age is a class 3 felony. All other unlawful sexual conduct is a class 5 felony.
- 3.18.4 Unlawful sexual conduct; correctional facilities; classification; Definition
A.R.S. § 13-1419.
- 3.19 Federal Prison Rape Elimination Act 2003 The Contractor shall comply with the Federal Prison Rape Elimination Act of 2003. Reference 28 C.F.R., Part § 115.
- 3.20 Contraband
- 3.20.1 Contraband means any dangerous drug, narcotic drug, intoxicating liquor of any kind, deadly weapon, dangerous instrument, explosive or any other article whose use of or possession would endanger the safety, security or preservation of order in a correctional facility or any person therein. (Any other article includes any substance which could cause abnormal behavior, i.e. marijuana, nonprescription medications, etc.

Promoting prison contraband A.R.S. § 13-2505:

A person, not otherwise authorized by law, commits promoting prison contraband:

- By knowingly taking contraband into a correctional facility or the grounds of such a facility; or
- By knowingly conveying contraband to any persons confined in a correctional facility; or
- By knowingly making, obtaining, or possessing contraband while being confined in a correctional facility.

Promoting Prison Contraband is a Class 5 felony.

Authority A.R.S. § 13-2501
 A.R.S. § 13-2505
 ADC Department Order 708

- 3.21 Offshore Performance of Work Prohibited. Any services that are described in the specifications or scope of work that directly serve the State of Arizona or its clients and involve access to secure or sensitive data or personal client data shall be performed within the defined territories of the United States. Unless specifically stated otherwise in the specifications, this paragraph does not apply to indirect or overhead services, redundant back-up services or services that are incidental to the performance of the contract. This provision applies to work performed by subcontractors at all

tiers.

- 3.22 Electronic and Information Technology. Unless specifically authorized in the Contract, any electronic or information technology offered to the State of Arizona under this Contract shall comply with A.R.S. § 41-2531 and A.R.S. § 41-2532 and Section 508 of the Rehabilitation Act of 1973, which requires that employees and members of the public shall have access to and use of information technology that is comparable to the access and use by employees and members of the public who are not individuals with disabilities.

3.23 E-Verify Requirement

- 3.23.1 In accordance with A.R.S. § 41-4401, Contractor warrants compliance with all Federal immigration laws and regulations relating to employees and warrants its compliance with AAC Section A.R.S. § 23-214, Subsection A.

3.24 Indemnification:

- 3.24.1 Each party (as "Indemnitor") agrees to defend, indemnify, and hold harmless the other party (as "Indemnatee") from and against any and all claims, losses, liability, costs, or expenses (including reasonable attorney's fees) (hereinafter collectively referred to as "Claims") arising out of bodily injury of any person (including death) or property damage, but only to the extent that such Claims which result in vicarious/derivative liability to the Indemnatee are caused by the act, omission, negligence, misconduct, or other fault of the Indemnitor, its officers, officials, agents, employees, or volunteers. The State of Arizona, Department of Corrections is self-insured per A.R.S. 41-621.

INMATE WORK PROGRAM UTILIZING ON-SITE CORRECTIONAL OFFICER(S) (CO)

- A. The Contractor shall provide training and special protective clothing if work environment necessitates use of specific safety precautions or if inmates must work with, near, or around hazardous materials, e.g., asbestos, explosives, radioactive substances. Provision of training shall be documented in writing for each inmate participant. Special protective clothing may include, but shall not be limited to, shoes, safety glasses, gloves, goggles, protective outerwear, hats, etc.
- B. The Contractor shall provide instruction to all inmate workers regarding necessary safety precautions at the job site. If inmate workers are required to operate special equipment as part of their job duties, appropriate training specific to its use shall be provided and documented.
- C. Contractor's supervisors shall have knowledge and training related to the particular work tasks described in the Contract to ensure that qualified technical supervision and assistance shall be provided to inmate workers as applicable to job requirements.
- D. All equipment, machinery and tools needed to accomplish designated work assignments shall be maintained in good repair and working condition by the Contractor.
- E. The Contractor shall comply with the required standards of the Occupational Safety and Health Act (OSHA) during the term of this Contract relative to safety of the work environment and equipment used by assigned inmate workers.
- F. The confidentiality of information regarding any inmate worker acquired in the course of service pursuant to this Contract shall be maintained in accordance with A.R.S. § 31-221, and **no** information shall be released without prior written authorization from a representative of the Department.
- G. The Contractor's personnel shall be instructed that it is unlawful for anyone to give, take or in any manner barter with inmates, i.e., the supplying of any goods, including food and soft drinks or monies, constitutes a felony for which they can be prosecuted. Inmates are not permitted to work where there are alcoholic beverages or illegal drugs. The Contractor's personnel shall not handle any mail, notes, packages, or verbal messages for assigned inmates. No inmate shall be permitted to make or receive telephone calls unless the call is made to or received from the prison facility in which the inmate is incarcerated.
- H. An authorized representative of the Department shall be permitted to visit or telephone assigned inmates at the prescribed place of work, or to otherwise communicate with the Contractor to discuss each inmate's work performance, work attendance and general behavior.
- I. No inmate shall be placed in a supervisory capacity over any other inmate.
- J. The Contractor shall provide immediate notification to the on-site CO of the following:
 - 1. Unsatisfactory work or malingering of inmates. If requested, the Contractor shall furnish a written account of such unsatisfactory performance.
 - 2. The discovery or suspicion of any intoxicant or un-prescribed drug in the possession of any inmate worker.
- K. **The visiting of an inmate by any unauthorized person shall not be permitted.** If any person is found visiting with an inmate, his or her name and description shall be given to Department authorities. If it is not possible or feasible to obtain names, other identification such as automobile make, description and license number shall be obtained when possible.

**STANDARD WORK PROVISION
INMATE WORK PROGRAMS**

**Attachment #1
ADC Contract No. 17-026-21**

- L. Any allegations of non-compliance with Department written instructions, or other Contractor misconduct, shall be subject to investigation by the Department.

INMATE WORK PROGRAM UTILIZING CONTRACTOR SUPERVISION

- A. No inmate shall be placed in a supervisory capacity over any other inmate.
- B. Department authorities shall be notified of unsatisfactory work or malingering of inmates and, if requested, the Contractor shall furnish a written account of such unsatisfactory performance.
- C. The Department shall receive immediate notification of an inmate's failure to remain at work in accordance with assigned job duties.
- D. The Department shall receive immediate notification of the discovery or suspicion of any intoxicant or unprescribed drug in the possession of any inmate worker.
- E. In the event of accident or serious illness while on the job, the Contractor may administer first aid as necessary and shall notify Department authorities without delay. If necessary, in the interest of life or limb, the inmate may be transported to the nearest hospital. Inmate workers **shall not** be transported in privately owned vehicles at any time.
- F. The Contractor shall provide training and special protective clothing if work environment necessitates use of specific safety precautions or if inmates must work with, near, or around hazardous materials, e.g., asbestos, explosives, radioactive substances. Provision of training shall be documented in writing for each inmate participant. Special protective clothing may include, but shall not be limited to, shoes, safety glasses, gloves, goggles, protective outerwear, hats, etc.
- G. The Contractor shall provide instruction to all inmate workers regarding necessary safety precautions at the job site. If inmate workers are required to operate special equipment as part of their job duties, appropriate training specific to its use shall be provided and documented.
- H. Contractor's supervisors shall have knowledge and training related to the particular work tasks described in the Contract to ensure that qualified technical supervision and assistance shall be provided to inmate workers as applicable to job requirements.
- I. All equipment, machinery and tools needed to accomplish designated work assignments shall be maintained in good repair and working condition by the Contractor.
- J. The Contractor shall comply with the required standards of the Occupational Safety and Health Act (OSHA) during the term of this Contract relative to safety of the work environment and equipment used by assigned inmate workers.
- K. The confidentiality of information regarding any inmate worker acquired in the course of service pursuant to this Contract shall be maintained in accordance with A.R.S. § 31-221, and **no** information shall be released without prior written authorization from a representative of the Department.
- L. The Contractor's personnel shall be instructed that it is unlawful for anyone to give, take or in any manner barter with inmates, i.e., the supplying of any goods, including food and soft drinks or monies, constitutes a felony for which they can be prosecuted. Inmates are not permitted to work where there are alcoholic beverages or illegal drugs.

**STANDARD WORK PROVISION
INMATE WORK PROGRAMS**

**Attachment #1
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- M. The Contractor's personnel shall not handle any mail, notes, packages, or verbal messages for assigned inmates. No inmate shall be permitted to make or receive telephone calls unless the call is made to or received from the prison facility in which the inmate is incarcerated.
- N. An authorized representative of the Department shall be permitted to visit or telephone assigned inmates at the prescribed place of work, or to otherwise communicate with the Contractor to discuss each inmate's work performance, work attendance and general behavior.
- O. **The visiting of an inmate by any unauthorized person shall not be permitted.** If any person is found visiting with an inmate, his or her name and description shall be given to Department authorities. If it is not possible or feasible to obtain names, other identification such as automobile make, description and license number shall be obtained when possible.
- P. Any allegations of non-compliance with Department written instructions, or other Contractor misconduct, shall be subject to investigation by the Department.

**STANDARD WORK PROVISION
SITE SAFETY AND
HEALTH PLAN**

**Attachment #2
ADC Contract No. 17-026-21**

Developed by: State of Arizona, Department of Administration
Risk Management Section

Provided by: Mike Foster, Manager, Safety and Environmental Services,
Administrative Services Division

1 PROGRAM OBJECTIVES

- 1.1 This Safety and Loss Prevention Program is established to exercise all available means of eliminating or controlling hazards and risks associated with renovation and construction projects.
 - 1.1.1 Minimize Personal injuries;
 - 1.1.2 Maximize Property Conservations;
 - 1.1.3 Achieve Greater Efficiency; and
 - 1.1.4 Reduce Direct and Indirect Costs
- 1.2 The effectiveness of Safety and Loss Prevention Program will depend on the active participation and full cooperation of all involved with the project to include management, supervisors, inmates, and employees, and their efforts in carrying out the following basic responsibilities.
 - 1.2.1 Plan all work to minimize personal injury, property damage and loss of productive time.
 - 1.2.2 Properly select inmates/employees based upon their skill level for the necessary job tasks.
 - 1.2.3 Provide for the protection of adjacent property and safety of the public.
 - 1.2.4 Coordinate activities with others at the work location.
 - 1.2.5 Establish and conduct an educational program to stimulate and maintain interest and participation of all inmates and employees through:
 - 1.2.5.1 Safety Meetings;
 - 1.2.5.2 Prompt investigation of all accidents and serious potential incidents to determine cause or causes and take necessary corrective action to eliminate a recurrence of a loss or incident;
 - 1.2.5.3 Use of proper work methods, personal protective equipment, and mechanical guards;
 - 1.2.5.4 Employee/inmate safety instructions to all assigned work; and
 - 1.2.5.5 Safety training programs.

2 RESPONSIBILITIES

- 2.1 It is the purpose of the program to organize and direct activities, which will:
 - 2.1.1 Avoid injuries.
 - 2.1.2 Reduce construction interruption due to an accident.
 - 2.1.3 Assure a safe and healthy place to work.

**STANDARD WORK PROVISION
SITE SAFETY AND
HEALTH PLAN**

**Attachment #2
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- 2.2 The Project Manager is required to establish and administer a site-specific safety program and will:
- 2.2.1 Make periodic loss prevention surveys.
 - 2.2.2 Submit written recommendations.
 - 2.2.3 Periodically attend safety meetings.
 - 2.2.4 Assure safety orientation meetings for employees/inmates are conducted and documented.
 - 2.2.5 Provide warning signs, safety literature, reporting forms, and other educational and training materials as deemed appropriate.
 - 2.2.6 Maintain a written comprehensive Safety and Loss Prevention manual.
 - 2.2.7 Give due consideration to all safety factors during pre-planning.
 - 2.2.8 Employ only those individuals physically and mentally capable of performing in a safe manner.
 - 2.2.9 Comply with the Occupational Safety and Health Act and all other applicable Federal, State and Local regulations.
 - 2.2.10 Provide and enforce the use of all necessary testing equipment for employee/inmate health and safety. Provide and enforce the use of personal protective equipment and use only where Engineering controls are not feasible.
 - 2.2.11 Provide properly guarded and maintained tools, machinery and equipment.
 - 2.2.12 Maintain necessary accident records and promptly file the reports required by the State or Federal authorities and the insurer.
 - 2.2.13 Promptly investigate any incident that causes injury or damage to property.
 - 2.2.14 Plan and schedule work operations so as to control personal injury and property damage hazards.
 - 2.2.15 Maintain good housekeeping conditions and fire protection equipment.
 - 2.2.16 Maintain an effective equipment inspection and maintenance program.
 - 2.2.17 Provide proper and specific work task training for employees/inmates regarding the hazards of their jobs and how to work safely.
 - 2.2.18 Correct unsafe work habits of employees/inmates as soon as they are observed.
 - 2.2.19 Eliminate unsafe conditions under their control and promptly report those they cannot eliminate to the proper authority.
 - 2.2.20 Conduct weekly toolbox meetings with all employees/inmates and maintain written records of these meetings. The written record shall include the date, topic discussed, comments, and attendees.

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SITE SAFETY AND
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- 2.2.21 Ensure each employee/inmate understands that violations of the project safety program will not be tolerated and that proper disciplinary action will be administered, including removal from the Project for violation of safety policy.

3 GENERAL SAFETY REQUIREMENTS

3.1 Laws and Regulations:

- 3.1.1 Responsible project management representatives shall comply with and enforce all local, state and federal laws, rules, statutes and regulations of governing or regulatory bodies within the geographical scope of its operations. They will also cooperate with all regulatory agencies regarding job site safety and health, and allow full access to the project for visitation.

3.2 Audit Procedures:

- 3.2.1 All documentation regarding safety training, hazard communication, electrical safety programs, equipment safety programs, equipment inspection and maintenance records, and fire protection inspection shall be kept on the job site.

3.3 Drug and Alcohol Policy:

- 3.3.1 The possession or use of any non-prescribed drug or any alcohol beverage on the job site is strictly prohibited.

4 SPECIFIC REQUIREMENTS

4.1 Emergency Procedures Guideline:

- 4.1.1 The Project Manager will set up emergency procedures for the following categories:

- 4.1.1.1 Fire
- 4.1.1.2 Injuries
- 4.1.1.3 Injury to the general public
- 4.1.1.4 Property damage, particularly to utilities; i.e., gas, water, sewage, electrical, telephone, or pedestrian and vehicle routes.
- 4.1.1.5 Public demonstrations
- 4.1.1.6 Bomb threats
- 4.1.1.7 Other exposures at the construction site

- 4.1.2 In order that necessary emergency services are supplied promptly, the Project Manager shall:

- 4.1.2.1 Post in a conspicuous place, a list of emergency phone numbers, along with the type of information to be transmitted for each emergency situation.
- 4.1.2.2 Delegate responsibility for making emergency calls.

- 4.1.3 It is the responsibility of the Project Manager to ensure immediate (5 min or less) reliable emergency medical response is available or to provide full time dedicated, trained emergency medical staff and facilities to be available to all employees/inmates If employees/inmates are working with materials that could adversely affect their respiration, or are subject to electrical shock that could cause loss of the breathing function, and medical response is longer than 3 to 4

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HEALTH PLAN**

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minutes, the Project Manager must adhere to the OSHA rules and regulations, 29 CFR 1926.50, regarding medical response for a construction site.

- 4.1.4 The Project Manager's emergency procedures should be reviewed regularly and, where necessary, adjusted to provide maximum effectiveness.

4.2 Protection of the Public:

- 4.2.1 The Project Manager shall take all necessary precautions to prevent injury to the public or damage to property of others. The term "public" shall include all persons not engaged in the project or others working under his/her direction. Precautions to be taken shall include, but not limited to, the following:

4.2.1.1 Work shall not be performed in any area occupied by the public unless specified permitted by the contract or in writing by the Project Manager.

4.2.1.2 When it is necessary to maintain public use of work areas involving sidewalks, entrances to buildings, lobbies, corridors, aisles, stairways and vehicular roadways, the Project Manager shall protect the public with appropriate guardrails, barricades, temporary partition shields, and adequate visibility. Such protection shall guard against harmful radioactive rays or particles, flying materials, falling or moving materials and equipment, hot or poisonous materials, explosives and explosive atmospheres, flammable or toxic liquids and gasses, open flames, energized circuits or other harmful exposures.

4.2.1.3 Sidewalks, entrances to buildings, lobbies, corridors, aisles, doors or exits shall be kept clear of obstructions to permit safe ingress and egress of the public at all times.

4.2.1.4 Appropriate warnings, signs, and instructional safety signs shall be conspicuously posted where necessary. In addition, a signal shall control the movement of motorized equipment in areas where the public might be endangered.

4.2.1.5 Sidewalk sheds, canopies, catch platforms and appropriate fences shall be provided when it is necessary to maintain public pedestrian traffic adjacent to the erection, demolition or structural, alteration of outside walls on any structure. The protection required shall be in accordance with the laws and regulations of the regulatory bodies.

4.2.1.6 A temporary fence shall be provided around the perimeter of above ground operations adjacent to public areas except where a sidewalk shed or fence is, if provided by the contract or as required by Subparagraph 5 above. Perimeter fences shall be at least six feet high and/or in compliance with the laws and regulations of the regulatory bodies involved.

4.2.1.7 Guardrails shall be provided on both sides of vehicular and pedestrian bridges, ramps, runways and platforms. Pedestrian walkways elevated above adjoining surfaces, or walkways within six feet of the top of excavated slopes or vertical banks shall be protected with guardrails, except where sidewalk sheds or fences are provided as required by Subparagraph 5 above. Guardrails shall be made of

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rigid materials capable of withstanding a force of at least 200 pounds applied in any direction at any point in their structure. Their height shall be approximately 42-inches. Top rails and post may be 2-inches by 4-inches dressed wood or equal. Intermediate horizontal rails at mid-height and toe boards at platform level may be 1-inch by 6-inch wood or equal. Posts shall not be over eight feet apart.

- 4.2.1.8 Barricades meeting the requirements of the political subdivision involved shall provide where sidewalk sheds, fences or guardrails as referenced above, are not required between work areas and pedestrian walkways, roadways or occupied buildings. Barricades shall be secured against accidental displacement and shall be maintained to perform the work. During the period a barricade is removed temporarily for the purposes of work, a watchman shall be placed at all openings.
- 4.2.1.9 Temporary sidewalks shall be provided when a permanent sidewalk is obstructed by the Trade Subcontractor's or any tier operations. They shall be in accordance with the requirements of the political subdivision involved. Guardrails shall be provided on both sides of temporary sidewalks.
- 4.2.1.10 Warning signs and lights including lanterns, torches, flares and electric lights, meeting requirements of the political subdivision involved, shall be maintained from dusk to sunrise along guardrails, barricades, temporary sidewalks and at every obstruction to the public. These shall be placed at both ends of such protection or obstructions and not over 20 feet apart alongside of such protection or obstructions.

4.3 Housekeeping

- 4.3.1 During the course of construction/renovation, housekeeping practices will be followed to keep the work areas, passageways, and stairs in and around the buildings or other structures, free from debris of all types.
 - 4.3.1.1 This shall include scrap lumber and form lumber with protruding nails.
 - 4.3.1.2 Combustible scrap and debris shall be removed at regular intervals. Containers shall be provided for the collection of scrap, trash and other debris.

4.4 Personal Protective Equipment:

- 4.4.1 The Project Manager shall be responsible for requiring the wearing of appropriate personal protective equipment in all operation where there is an exposure to hazardous conditions or where there is an indication of the need for using such equipment to reduce the hazard to employees/inmates. Such equipment will be used where engineering out the hazard is not feasible.

4.5 Flammable and Combustible Liquids:

- 4.5.1 Flammable and combustible liquids shall be stored and dispensed in compliance with regulations and rules established by the governing regulatory bodies.

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- 4.5.2 Any leakage or spillage of flammable or combustible liquids shall be cleaned up immediately and disposed of promptly and safely.
- 4.5.3 Transfer of flammable liquids from one container to another shall require electrically bonding the containers.
- 4.5.4 Small quantities of flammable liquids that may be used at various points on the Job Site shall be handled in approved safety cans.
- 4.5.5 No smoking, matches, or open flames will be permitted within 50 feet of the area where flammable liquids are used or transferred, unless conditions warrant greater clearance.
- 4.5.6 Fuel trucks will properly have marked, contents clearly identified, posted and with proper fire protection.
- 4.5.7 Fuel tanks over 500 gallons will be diked, grounded, and protected from contact by vehicles on all sides. Proper identification of tanks and access for measurement will be maintained.
- 4.6 Tools – Hand and Power:
 - 4.6.1 All hand and power tools and equipment shall be maintained in a safe condition. The Project Manager shall be responsible for the condition of all tools or equipment used by employees/inmates.
 - 4.6.2 Power operated tools that are designed to accommodate guards shall be equipped with such guards while in use.
 - 4.6.3 Belts, gears, shafts, pulleys, sprockets, spindles, drums, flywheels, chains, or other reciprocating, rotating or moving parts of such equipment or tools shall be guarded if such parts are exposed to contact.
 - 4.6.4 Wrenches shall not be used when the jaws are sprung or worn to the point that slippage occurs.
 - 4.6.5 Impact tool such as wedges and chisels shall be kept free of mushroomed heads.
 - 4.6.6 Wooden handles of tool shall be kept free of splinters and cracks and shall be kept tight in the tool.
 - 4.6.7 All hand-held powered drills, fastener drivers, grinders with wheels greater than 2-inches in diameter, disc sanders, belt sanders, reciprocating saws, saber saws and similar operating power tools shall be equipped with a momentary contact off-on control and may have a lock-on control provided that turn off can be accomplished with a single motion of the same finger or fingers that turn it on.
 - 4.6.8 All other hand-held powered tools such as circular saws, chain saws, and percussion tools with positive accessory holding means, shall be equipped with a constant pressure switch that will shut off power when the pressure is released.
 - 4.6.9 The use of electrical cords for hoisting or lowering tools shall not be permitted.

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- 4.6.10 Pneumatic power tools shall be secured to the hose or whip by some positive means to prevent the tool from becoming accidentally disconnected. Each section of supply hose to pneumatic tool shall also be secured by some positive means to prevent accidental disconnection.
- 4.6.11 Safety clips or retainers shall be securely installed and maintained on pneumatic impact tools to prevent attachments from being accidentally expelled.
- 4.6.12 Pneumatic hoses shall not be used as a means of hoisting or lowering tools.
- 4.6.13 Only employees/inmates who have been trained in the operation of the particular tool in use shall be allowed to operate a power-actuated tool.
- 4.6.14 Power-actuated tools shall be tested each day before loading to see that safety devices are in proper working condition. The testing shall be done in accordance with the manufacturer's recommended pressure.
- 4.7 Earth Moving Equipment:
 - 4.7.1 Operators will receive instructions on proper mounting and dismounting of equipment.
 - 4.7.2 Operators shall wear seat belts while vehicle is in motion.
 - 4.7.3 Equipment shall be in safe operating condition and inspected daily for proper braking and hydraulic systems and tires.
 - 4.7.4 Dozer, loader, scraper, backhoe buckets, glades and pans will be grounded before the operator dismounts.
 - 4.7.5 Prior to mounting any equipment, the operator will visually inspect the area not visible from the operator's station.
 - 4.7.6 Equipment will have audible warning devices in good working order.

LETTER OF INSTRUCTION
REQUEST FOR AUTHORIZATION

UTILIZING INMATE WORKERS FOR OPERATION OF OFF-ROAD MOBILE EQUIPMENT

Inmate Work Contracts between the Department and the Contractor provide authorization for assigned inmate workers to operate off-road mobile equipment under certain conditions. This Letter of Instruction provides the procedure for obtaining approval to utilize inmate workers on Contractor's off-road mobile equipment.

- 1 The Contractor shall provide written notice advising of the need to utilize inmate workers to operate specific off-road mobile equipment. The request shall include the following information:
 - 1.1 A complete list describing the type(s) of off-road mobile equipment to be operated;
 - 1.2 Identification of specific training inmates will receive for each type of off-road mobile equipment; and
 - 1.3 A list of inmates, to include the inmate's Department identification number, for whom approval is being requested. The list **shall** reflect the type(s) of mobile equipment to be operated, specific to each inmate worker.
- 2 The Department shall acknowledge the Contractor's request and, after coordinating with institution officials, notify the Contractor in writing of those inmates approved to be trained to operate off-road mobile equipment. The Contractor **shall not** proceed with training until written notice of authorization is received from the Department.
- 3 Once approval to proceed with training is received, the Contractor shall provide safety and operational training to approved inmates for each type of specified off-road mobile equipment. The manufacturer's supplied training materials and/or materials developed in accordance with Occupational Safety and Health Act (OSHA) guidelines, for each specific type of mobile equipment, should meet the training requirements for each inmate operator. Copies of training materials shall be provided to the Department for record keeping purposes.
- 4 Once training is complete, the Contractor shall furnish documentary evidence of satisfactory completion of training for each inmate. The documentation shall include the inmate's certification by signature that he/she understands the operation and safety issues of each type of mobile equipment he/she has been trained to operate.
- 5 Following review of training documents provided by the Contractor, and/or designee, the Department shall furnish the Contractor with notification of approval for individual inmates. Contractor shall maintain records of training and authorization for all inmate workers as long as they are engaged in this inmate work program.
- 6 The Contractor shall acquire and maintain applicable insurance in compliance with State requirements.

**CONTRACTOR
AUTHORIZED WORK LOCATION**

**Attachment #4
ADC Contract No. 17-026-21**

Work Hours	Location	Preferred Number of Inmates	Supervision
TBD	Various Locations within the City of Surprise	2 Crews with 10 Inmates ea.	Department



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date:	January 17, 2017	Contact Person:	Hobart Wingard - Community Development
Submitting Department:	CD	District:	3
Staff Recommendations:	None		

Consent	x	Regular	Public Hearing	Report/Discussion
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Agenda Wording:

Consideration and action on a Final Plat of Acoma Court dated December 19, 2016; a property generally located approximately 1,650 feet west of Reems Road, bounded by West Custer Lane to the north, the Calibre Academy of Surprise to the east, West Acoma Drive to the south, and the Legacy Parc Planned Area Development (PAD) to the west.

Motion:

I move to approve a Final Plat of Acoma Court dated December 19, 2016.

Background:

Bergin, Frakes, Smalley & Oberholtzer, on behalf of Acoma Court, LLC, seeks approval of a Final Plat of approximately 29.55 acres of land to allow for 117 single-family residential lots within the Acoma Court PAD. The project is generally located approximately 1,650 feet west of Reems Road, bounded by West Custer Lane to the north, the Calibre Academy of Surprise to the east, West Acoma Drive to the south, and the Legacy Parc Planned Area Development (PAD) to the west.

Objective Analysis:

The proposed Final Plat will provide the mechanism needed to allow the owner to construct a 117 single-family residential subdivision while providing rights-of-way which will in turn allow it to be developed in a manner that is consistent with the goals and policies of the General Plan.

Policy Compliant:

The proposed project is consistent with City and Council Policy.

Financial Impact:

All activity related to ongoing development of the City of Surprise has an economic and fiscal impact on the city and the region.

Budget Impact:

There is no anticipated budget impact related to this item.

FTE Impact:

This item does not have an impact on current staff levels.

ATTACHMENTS:

Click to download

- ☐ [00 - FS16-321 Acoma Court - Final Plat - Staff Report](#)
 - ☐ [01 - FS16-321 Acoma Court - Final Plat - Vicinity Maps](#)
 - ☐ [03 - FS16-321 Acoma Court - Final Plat](#)
 - ☐ [03a - FS16-321 Acoma Court - Final Plat - Landscape 1](#)
 - ☐ [03b - FS16-321 Acoma Court - Final Plat - Landscape 2](#)
 - ☐ [04 - FS16-321 Acoma Court - Final Plat - Presentation](#)
-

FINAL PLAT

REPORT TO THE MAYOR AND CITY COUNCIL

Case: **FS16-321**

Project Name: Acoma Court Final Plat

Council District: 3 - Mesquite

Meeting Date: **January 17, 2017**

Planner: Hobart Wingard, 623-222-3156, hobart.wingard@surpriseaz.gov

Owner: Acoma Court, LLC

Applicant: Bergin, Frakes, Smalley & Oberholtzer

Request: A Final Plat to allow for 117 single-family residential lots on approximately 29.55 acres known as Acoma Court.

Site Location: Generally located approximately 1,650 feet west of Reems Road, bounded by West Custer Lane to the north, the Calibre Academy of Surprise to the east, West Acoma Drive to the south, and the Legacy Parc Planned Area Development (PAD) to the west.

Site Size: Approximately 29.55 acres

Density: Approximately 3.96 dwelling units per acre

General Plan Conformance: The proposal is consistent with the Surprise General Plan

Support/Opposition: Neither support or opposition was encountered

Findings:

- The proposed Final Plat is consistent with the Surprise General Plan 2035
- The proposed Final Plat demonstrates compliance with the existing Acoma Court PAD
- The proposed Final Plat is consistent with the previously approved Acoma Court Preliminary Plat
- The reviewing agencies have indicated no objections to the request

Alternative Actions: **Approval** of the requested amended Final Plat will allow the applicant to develop the property in a manner that is consistent with City of Surprise requirements and the Acoma Court PAD.
 Denial of the requested amended Final Plat will deny the applicant the opportunity to reasonably develop the property.

PROJECT DESCRIPTION:

Bergin, Frakes, Smalley & Oberholtzer, on behalf of Acoma Court, LLC, seeks approval of a Final Plat of approximately 29.55 acres of land to allow for 117 single-family residential lots within the Acoma Court PAD. The project is generally located approximately 1,650 feet west of Reems Road, bounded by West Custer Lane to the north, the Calibre Academy of Surprise to the east, West Acoma Drive to the south, and the Legacy Parc Planned Area Development (PAD) to the west. The Final Plat will split three (3) existing parcels into the following:

- Tracts – 405,633 square feet (9.31 acres)
 - o Includes private streets, easements, open space, sidewalks, etc.
- Residential Lots – 836,932 square feet (19.21 acres)
 - o 40 – Typically 58 foot by 125 foot lots
 - o 77 – Typically 48 foot by 125 foot lots
 - o **117 Total Residential Lots**
- Rights-of-way Dedication - 44,690 square feet (1.03 acres)
- **Total – 1,287,255 (29.55 acres)**

HISTORY:

- **September 10, 1998:** The subject parcels were annexed into the City of Surprise.
- **November 8, 2007:** The Mayor City Council approved a PAD for Acoma Court under case PAD07-224.
- **May 14, 2009:** The Mayor and City Council approved a Preliminary Plat for Acoma Court under case PP07-380.
- **May 17, 2015:** The Mayor and City Council approved a PAD Rezone and a Preliminary Plat for Acoma Court under case FS15-526.
- **June 23, 2016:** Staff met with the applicant to discuss the subject project during a regularly scheduled Concept Review meeting under CR16-243.

- **July 19, 2016:** The applicant filed a request for a Final Plat under case FS16-321, the subject case.

SUMMARY:

Staff believes the proposed Final Plat will provide the mechanism needed to allow the owner to construct a 117 single-family residential subdivision while providing rights-of-way which will in turn allow it to be developed in a manner that is consistent with the goals and policies of the General Plan.

FINDINGS:

- a. The proposed Final Plat is consistent with the Surprise General Plan 2035
- b. The proposed Final Plat demonstrates compliance with the existing Acoma Court PAD
- c. The proposed Final Plat is consistent with the previously approved Acoma Court Preliminary Plat
- d. The reviewing agencies have indicated no objections to the request

Attachments:

- 01 – Vicinity Maps
- 02 – Final Plat
- 03 – Acoma Court Landscape Plans

VICINITY MAP



VICINITY MAP



DEDICATION

STATE OF ARIZONA)
)SS
COUNTY OF MARICOPA)

KNOW ALL PERSONS BY THESE PRESENTS:

THAT ACOMA COURT, LLC, AN ARIZONA LIMITED LIABILITY COMPANY ("OWNER"), HAS SUBDIVIDED UNDER THE NAME "ACOMA COURT", A SUBDIVISION LOCATED IN A PORTION OF LAND LOCATED IN THE NORTHEAST QUARTER OF SECTION 7, TOWNSHIP 3 NORTH, RANGE 1 WEST, OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA AS SHOWN AND PLATTED HEREON AND DOES HEREBY PUBLISH THIS PLAT AS AND FOR THE PLAT OF "ACOMA COURT" AND DECLARES THAT THIS PLAT SETS FORTH THE LOCATION AND GIVES THE DIMENSIONS OF EACH LOT, TRACT, STREET, AND EASEMENT CONSTITUTING SAME, AND THAT EACH LOT, TRACT, STREET, AND EASEMENT SHALL BE KNOWN BY THE NUMBER, LETTER, AND/OR NAME GIVEN TO EACH RESPECTIVELY AS SHOWN ON THIS PLAT.

OWNER HEREBY DEDICATES TO THE CITY OF SURPRISE FEE TITLE TO ALL PUBLIC RIGHTS-OF-WAY AS SHOWN ON THE PLAT.

OWNER HEREBY GRANTS TO MARICOPA COUNTY MUNICIPAL WATER CONSERVATION DISTRICT NUMBER ONE AN EASEMENT AS PROVIDED FOR IN THE INTERGOVERNMENTAL AGREEMENT BETWEEN THE CITY OF SURPRISE AND MARICOPA COUNTY MUNICIPAL WATER CONSERVATION DISTRICT NUMBER ONE DATED APRIL 8, 1997 AND RECORDED IN THE MARICOPA COUNTY RECORDERS OFFICE ON APRIL 9, 1997 UNDER DOCKET NUMBER 97-0231759, FOR FUTURE CONSTRUCTION, INSTALLATION, PLACEMENT, AND MAINTENANCE OF FACILITIES BY THE OWNER(S) OF PARCELS LOCATED EAST OF THIS DEVELOPMENT UPON, ACROSS AND UNDER THE AREAS DESIGNATED AS SHOWN ON THE PLAT FOR PROVIDING NONPOTABLE WATER TO PARCELS LOCATED EAST OF THIS DEVELOPMENT.

OWNER HEREBY GRANTS TO THE CITY OF SURPRISE A NON EXCLUSIVE EASEMENT OVER, UPON AND ACROSS ALL SEWER LINES AND, MANHOLES AS SHOWN ON THE PLAT FOR THE PURPOSE OF INSTALLING, CONSTRUCTING, MAINTAINING, REPAIRING, REPLACING AND UTILIZING THE SEWER LINES, AND MANHOLES.

OWNER HEREBY GRANTS PERPETUAL WATER EASEMENTS ("EASEMENTS") AS DESCRIBED IN THE PLAT TO EPCOR WATER ARIZONA INC, AND ITS SUCCESSORS AND ASSIGNS (COLLECTIVELY, "GRANTEE"), TO CONSTRUCT, OPERATE, AND MAINTAIN WATER LINES AND APPURTENANT FACILITIES (COLLECTIVELY, "FACILITIES") UPON, ACROSS, OVER AND UNDER THE SURFACE OF THE EASEMENTS, TOGETHER WITH THE RIGHT TO OPERATE, REPAIR, REPLACE, MAINTAIN, AND REMOVE THE FACILITIES FROM THE PREMISES; TO ADD OR TO ALTER THE FACILITIES, AND TO PROVIDE GRANTEE WITH REASONABLE INGRESS AND EGRESS TO THE FACILITIES. GRANTEE WILL HAVE UNRESTRICTED ACCESS TO THE EASEMENT FOR THE ACTIVITIES DESCRIBED ABOVE AND FORMAL NOTIFICATION OR APPROVAL BY ANY ASSOCIATION PRIOR TO ACCESSING THE EASEMENT WILL NOT BE REQUIRED; GRANTOR SHALL NOT ERECT OR CONSTRUCT OR PERMIT TO BE ERECTED OR CONSTRUCTED ANY BUILDING, STRUCTURE OR SIMILAR IMPROVEMENT WITHIN THE LIMITS OF THE EASEMENT GRANTED HEREIN, GRANTOR SHALL NOT, NOR PERMIT, THE GRADE OVER GRANTEE'S FACILITIES TO BE SUBSTANTIALLY ALTERED WITHOUT, IN EACH INSTANCE, THE PRIOR WRITTEN CONSENT OF GRANTEE, AND GRANTOR AGREES THAT NO OTHER PIPES OR CONDUITS SHALL BE PLACED WITHIN THE PREMISES SUBJECT TO THE EASEMENT GRANTED HEREIN, EXCEPT PIPES CROSSING GRANTEE'S FACILITIES AT RIGHT ANGLES, IN WHICH CASE, A MINIMUM VERTICAL DISTANCE OF TWO (2) FEET (AS MEASURED FROM THE CLOSEST POINTS ON THE OUTSIDE EDGES) SHALL BE MAINTAINED BETWEEN GRANTEE'S FACILITIES AND SUCH OTHER PIPES OR CONDUITS. UNLESS GRANTEE EXPRESSLY CONSENTS IN WRITING OTHERWISE, ANY AND ALL SEWER PIPES CROSSING THE EASEMENT GRANTED HEREIN SHALL BE LAID BELOW GRANTEE'S FACILITIES. HOWEVER, GRANTOR SHALL HAVE THE RIGHT TO CONSTRUCT AND ERECT FENCES, TO INSTALL LANDSCAPING, PARKING FACILITIES AND DRIVEWAYS, AND TO ESTABLISH OTHER USES THAT ARE NOT INCONSISTENT WITH USES WITHIN THE LIMITS OF SAID EASEMENT IN A MANNER THAT WILL NOT UNREASONABLY INTERFERE WITH GRANTEE'S ACCESS TO THE FACILITIES.

OWNER HEREBY GRANTS TO THE CITY OF SURPRISE A CROSS ACCESS EASEMENT ACROSS TRACT M FOR THE PURPOSE OF PROVIDING CONTINUOUS AND UNINTERRUPTED INGRESS AND EGRESS FOR EMERGENCY AND TRASH COLLECTION VEHICLES.

OWNER HEREBY GRANTS TO THE PUBLIC A NON-EXCLUSIVE EASEMENT OVER, UPON AND ACROSS THE AREAS DESIGNATED AS PUBLIC UTILITY EASEMENTS AS SHOWN ON THE PLAT FOR THE PURPOSE OF INSTALLING, CONSTRUCTING, MAINTAINING, REPAIRING, REPLACING AND UTILIZING PUBLIC UTILITIES.

OWNER HEREBY GRANTS TO THE CITY OF SURPRISE A NON-EXCLUSIVE EASEMENT OVER, UPON AND ACROSS THE AREAS DESIGNATED AS SIGHT VISIBILITY TRIANGLES FOR THE PURPOSE OF ENSURING THAT THESE AREAS REMAIN FREE OF SIGHT VISIBILITY OBSTRUCTIONS.

OWNER HEREBY GRANTS TO THE ULTIMATE OWNER OF EACH PARCEL CREATED BY THIS PLAT AN EASEMENT OVER, UPON AND ACROSS TRACT M FOR THE PURPOSE OF PROVIDING CONTINUOUS AND UNINTERRUPTED INGRESS AND EGRESS TO EACH PARCEL CREATED BY THIS PLAT.

OWNER HEREBY GRANTS TO THE CITY OF SURPRISE A PERPETUAL NON-EXCLUSIVE PEDESTRIAN ACCESS AND SIDEWALK CONSTRUCTION AND MAINTENANCE EASEMENT OVER, UPON AND ACROSS THE AREAS DESIGNATED AS SIDEWALK EASEMENT AS SHOWN ON THE PLAT.

OWNER HEREBY GRANTS TO THE UNITED STATES OF AMERICA DEPARTMENT OF THE AIR FORCE ("USAF") AN AVIGATION EASEMENT OVER AND ACROSS THIS PLAT AND EVERY LOT AND PARCEL THEREOF, WHICH EASEMENT SHALL INCLUDE, BUT NOT BE LIMITED TO, THE RIGHT OF FLIGHT OF AIRCRAFT OVER THIS PLAT, TOGETHER WITH ITS ATTENDANT NOISE, VIBRATIONS, FUMES, DUST, FUEL AND LUBRICANT PARTICLES, AND ALL OTHER EFFECTS THAT MAY BE CAUSED BY THE OPERATION OF AIRCRAFT LANDING AT, OR TAKING OFF FROM, OR OPERATING AT OR ON LUKE AIR FORCE BASE AND AUXILIARY FIELD.

OWNER DOES HEREBY (1) RELEASE AND DISCHARGE THE CITY OF SURPRISE, AND (2) INDEMNIFY, DEFEND, AND HOLD HARMLESS THE CITY OF SURPRISE, OF AND FROM ANY LIABILITY FOR ANY AND ALL CLAIMS FOR DAMAGES OF ANY KIND TO PERSONS OR PROPERTY THAT MAY ARISE AT ANY TIME IN THE FUTURE OVER, OR IN CONNECTION WITH THE AREAS LOCATED WITHIN THE NEWLY DEDICATED RIGHT-OF-WAY AS DEPICTED ON THIS PLAT UNTIL SUCH TIME THE RIGHT-OF-WAY IS IMPROVED TO CITY STANDARDS AND THOSE IMPROVEMENTS ARE APPROVED AND ACCEPTED BY THE CITY COUNCIL. THE MAINTENANCE OF THE AREA WITHIN ANY NEWLY DEDICATED RIGHT-OF-WAY AS SHOWN ON THIS PLAT SHALL BE THE RESPONSIBILITY OF THE ADJACENT OWNER OR SUBSEQUENT ADJACENT OWNERS WITHIN THE BOUNDARY OF SAID PLAT UNTIL SUCH TIME THAT THE AREA WITHIN THE RIGHT-OF-WAY IS IMPROVED TO CITY STANDARD AND ACCEPTED BY THE CITY OF SURPRISE.

ANY PARTY WITH RIGHTS TO ANY WATER OR SEWER EASEMENT THAT OVERLAPS ANOTHER WATER OR SEWER EASEMENT SHALL HAVE THE RIGHT TO INSTALL, CONSTRUCT, MAINTAIN, REPAIR, REPLACE AND UTILIZE THE WATER/SEWER LINES/WATER METERS IN SUCH EASEMENTS THAT OVERLAP IN AN EMERGENCY SITUATION WITHOUT THE CONSENT OF ALL PARTIES WITH RIGHTS TO SUCH EASEMENTS. IN SUCH AREAS THAT OVERLAP IN A NON-EMERGENCY SITUATION ALL PARTIES SHALL CONSENT PRIOR TO ALLOWING ANY OTHER PARTY TO PERFORM ANY INSTALLATION, CONSTRUCTION, MAINTENANCE, REPAIR, OR REPLACEMENT WORK WITHIN THE EASEMENT.

THE MAINTENANCE OF LANDSCAPING WITHIN THE OPEN SPACES, LANDSCAPED TRACTS, RETENTION BASINS AND PARKS SHALL BE THE RESPONSIBILITY OF THE OWNER OR THE ASSOCIATION FORMED BY THE OWNER.

FINAL PLAT FOR ACOMA COURT

A PORTION OF LAND LOCATED IN THE NORTHEAST QUARTER OF SECTION 7,
TOWNSHIP 3 NORTH, RANGE 1 WEST, OF THE GILA AND SALT RIVER BASE AND MERIDIAN,
MARICOPA COUNTY, ARIZONA

DEVELOPER/OWNER

ACOMA COURT, LLC
1838 W. PARKSIDE LANE
SUITE 200
PHOENIX, ARIZONA 85027
PHONE: (480) 607-6580
CONTACT: RICK TAYRIEN
EMAIL: RTAYRIEN@GWHAZ.COM

ENGINEER

CVL CONSULTANTS
4550 NORTH 12TH STREET
PHOENIX, ARIZONA 85014
PHONE: (602) 264-6831
FAX: (602) 264-6831
CONTACT: DOUGLAS W. CHUBIN, P.E.
EMAIL: DCHUBIN@CVLCI.COM

DEDICATION (CONTINUATION)

THE MAINTENANCE OF LANDSCAPING WITHIN THE ADJACENT PUBLIC RIGHTS-OF-WAY, INCLUDING LANDSCAPED MEDIANS WITHIN COLLECTORS AND LOCAL STREETS AND LANDSCAPED AREAS BETWEEN THE CURB AND THE DETACHED SIDEWALK, SHALL BE THE RESPONSIBILITY OF THE ADJACENT PROPERTY OWNER OR THE PROPERTY ASSOCIATION FORMED BY THE ADJACENT PROPERTY.

ALL IMPROVEMENTS, FOR STREETS AND PUBLIC UTILITIES OWNED AND OPERATED BY THE CITY, INSTALLED OR CONSTRUCTED BY OWNER WITHIN THE PUBLIC RIGHTS-OF-WAY, THE EASEMENTS, OR ANY TRACTS OR PARCELS HEREBY DEDICATED TO THE CITY OF SURPRISE SHALL BE DEEMED TO HAVE BEEN DEDICATED BY OWNER TO THE CITY UPON THEIR COMPLETION; HOWEVER, SUCH TRANSFER SHALL NOT OCCUR UNTIL THE CITY COUNCIL FOR THE CITY OF SURPRISE MANIFESTS ITS ACCEPTANCE BY SEPARATE FORMAL COUNCIL ACTION.

THE EASEMENTS GRANTED WITHIN THIS DEDICATION ARE PERMANENT AND PERPETUAL AND SHALL RUN WITH THE LAND AND BE BINDING UPON OWNER AND ITS HEIRS, ASSIGNS, AND SUCCESSORS IN INTEREST TO THIS PLAT OR ANY PARCEL OR LOT THEREOF. IN WITNESS WHEREOF, OWNER HAS HEREUNTO CAUSED ITS CORPORATE NAME TO BE SIGNED AND ITS CORPORATE SEAL TO BE AFFIXED BY THE UNDERSIGNED, DULY AUTHORIZED OFFICER THIS 28th DAY OF Dec., 2016.

ACOMA COURT, LLC, AN ARIZONA LIMITED LIABILITY COMPANY
BY GWH HOLDINGS LLC, AN ARIZONA LIMITED LIABILITY COMPANY, ITS MANAGER

BY Rick Tayrien
ITS Manager

ACKNOWLEDGEMENT

STATE OF ARIZONA)
)SS
COUNTY OF MARICOPA)

BEFORE ME THIS 28th DAY OF December, 2016 PERSONALLY APPEARED BEFORE ME, THE UNDERSIGNED NOTARY PUBLIC, WHO ACKNOWLEDGED HIMSELF TO BE

Rick Tayrien OF THE AUTHORIZED AGENT OF GWH HOLDINGS, LLC, AN ARIZONA LIMITED LIABILITY COMPANY, THE MANAGER OF ACOMA COURT, LLC, AN ARIZONA LIMITED LIABILITY COMPANY, THE LEGAL OWNER OF THE PROPERTY PLATTED HEREON AND

ACKNOWLEDGE THAT Rick Tayrien AS

Manager, EXECUTED THIS INSTRUMENT FOR THE PURPOSES HEREIN CONTAINED

IN WITNESS WHEREOF, I HEREUNTO SET MY HAND AND OFFICIAL SEAL

Ramona Nielsen NOTARY PUBLIC
02-26-2019 EXPIRES

NOTICE OF ACOMA COURT DEVELOPMENT AGREEMENT

OWNER'S PREDECESSOR, ACOMA LAND COMPANY, LLC, A NEVADA LIMITED LIABILITY COMPANY HAS ENTERED INTO A ACOMA COURT DEVELOPMENT AGREEMENT DATED OCTOBER 21, 2013 ("AGREEMENT") WITH MARICOPA COUNTY MUNICIPAL WATER CONSERVATION DISTRICT NUMBER ONE ("MWD") FOR WHICH A MEMORANDUM OF AGREEMENT WAS RECORDED ON OCTOBER 23, 2013, AT THE MARICOPA COUNTY RECORDER'S OFFICE AT DOCKET NO. 2013-0931136. THE PROPERTIES INVOLVED IN THIS PLAT ARE SUBJECT TO THIS AGREEMENT. THE AGREEMENT AND THIS PLAT, INCLUDING ANY AND ALL DEDICATIONS THEREIN, HEREBY PRESERVE MWD'S PRIOR AND SUPERIOR RIGHTS OF ACCESS TO AND USE OF EXISTING AND FUTURE MWD FACILITIES AND MWD PROPERTY INTERESTS, AS SUCH TERMS ARE DEFINED IN THE AGREEMENT, TO ENABLE MWD TO ACCOMPLISH ALL OF MWD'S PURPOSES, INCLUDING, BUT NOT LIMITED TO, THE TRANSMISSION AND DISTRIBUTION OF WATER, WASTEWATER, POWER AND COMMUNICATIONS, AND TO CONSTRUCT, RECONSTRUCT, OPERATE, MAINTAIN AND REPLACE THOSE MWD FACILITIES AND MWD PROPERTY INTERESTS. THE AGREEMENT IS ON FILE AT THE OFFICES OF LANDOWNER AT ACOMA COURT, LLC C/O GARRETT WALKER HOMES, LLC, 1838 W. PARKSIDE LANE, SUITE 200, PHOENIX, AZ 85027 AND MAY BE REVIEWED AS TO ALL DETAILS, WITH PARTICULAR REFERENCE TO SECTION 7 AND SECTION 9, UPON REASONABLE REQUEST.

DATED THIS 3rd DAY OF January, 2017.

MARICOPA COUNTY MUNICIPAL
WATER CONSERVATION DISTRICT
NUMBER ONE, A POLITICAL SUBDIVISION
OF THE STATE OF ARIZONA ("MWD")

BY: Christine Cain
CHRISTINE CAIN

ITS: PROPERTY & CONTRACTS SUPERVISOR

ATTEST:

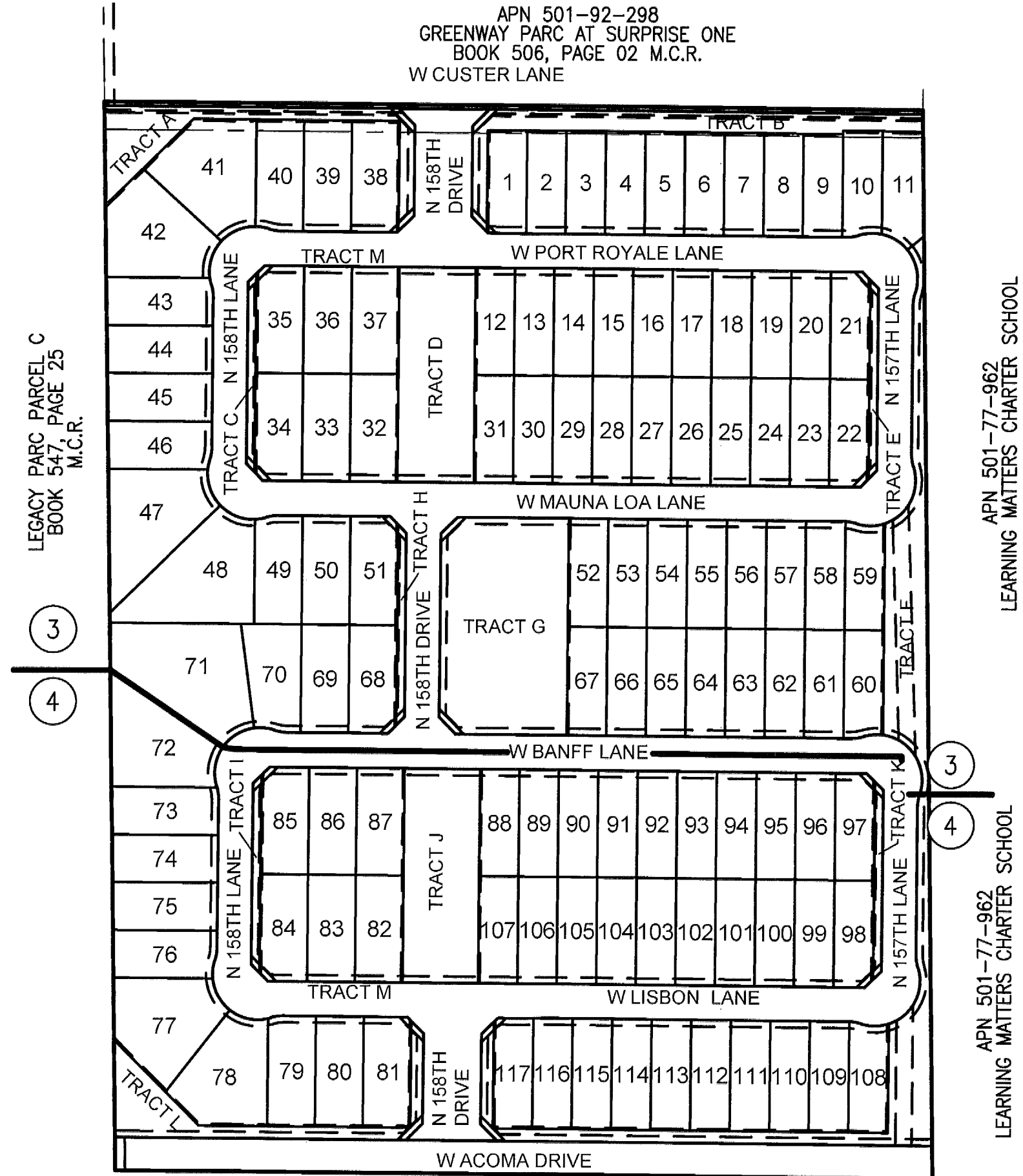
BY: Glen Vorthers
GLEN VORTHERS

ITS: ASSISTANT SECRETARY

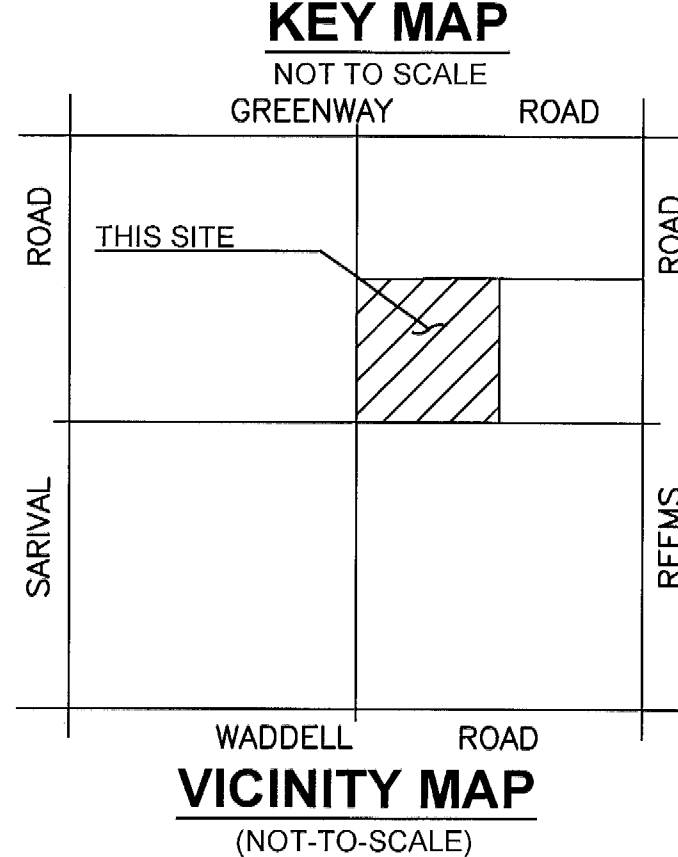
ACOMA COURT, LLC,
AN ARIZONA LIMITED LIABILITY COMPANY
BY: GWH HOLDINGS, LLC,
AN ARIZONA LIMITED LIABILITY COMPANY
ITS: MANAGER

BY: Rick Tayrien
RICK TAYRIEN

ITS: AUTHORIZED AGENT



KEY MAP



NOTICE OF INTERGOVERNMENTAL AGREEMENT

THE CITY OF SURPRISE ("CITY") AND MARICOPA COUNTY MUNICIPAL WATER CONSERVATION DISTRICT NUMBER ONE ("MWD") ENTERED INTO AN INTERGOVERNMENTAL AGREEMENT DATED APRIL 8, 1997, AND RECORDED IN THE MARICOPA COUNTY RECORDER'S OFFICE ON APRIL 9, 1997, UNDER DOCKET NO. 97-0231759 ("IGA"). CITY AND MWD HAVE FACILITIES AND PROPERTY INTERESTS DESCRIBED AND DELINEATED WITHIN CERTAIN SUBDIVISION PLATS OR, FOR LANDS NOT INCLUDED IN A SUBDIVISION PLAT, DECLARATIONS OF TURF LANDS OR DECLARATIONS OF URBANIZED AREA, THAT HAVE PRIOR AND SUPERIOR RIGHTS TO THE UTILITY SERVICE PROVIDERS, AS DEFINED IN THE IGA. THE IGA PROVIDES FOR THE CITY TO HAVE A PUBLIC UTILITY EASEMENT WITHIN CERTAIN MWD PROPERTY INTERESTS AND FOR MWD TO HAVE AN EASEMENT WITHIN CITY'S PUBLIC RIGHTS-OF-WAY. CITY AND MWD RIGHTS WITHIN THESE EASEMENTS ARE SUBJECT TO AND CONTROLLED BY THE TERMS AND CONDITIONS OF THE IGA.

IN LOCATIONS WHERE APPLICABLE, INCLUDING ANY AND ALL DEDICATIONS WITHIN A SUBDIVISION PLAT, MWD'S PRIOR AND SUPERIOR RIGHTS OF ACCESS TO AND USE OF EXISTING AND FUTURE MWD FACILITIES AND PROPERTY INTERESTS, SHALL BE SUBJECT TO THE TERMS AND CONDITIONS OF THE IGA.

CITY SHALL HAVE THE RIGHT TO AUTHORIZE AND CONTROL THE UTILITY SERVICE PROVIDER'S USE AND OCCUPANCY OF THESE EASEMENTS. CITY REQUIRES THAT UTILITY SERVICE PROVIDERS CONSENT TO BE BOUND BY THE IGA PRIOR TO THE USE OR OCCUPANCY OF THE EASEMENTS GRANTED UNDER THE IGA. SUCH USE OR OCCUPANCY OF THE EASEMENTS CONSTITUTES CONSENT OF THE UTILITY SERVICE PROVIDERS TO BE BOUND BY THE IGA.

HOMEOWNERS ASSOCIATION RATIFICATION

BY THIS RATIFICATION, ANGELA KENT, DULY AUTHORIZED AGENT OF ACOMA COURT HOMEOWNERS ASSOCIATION, AN ARIZONA NON-PROFIT CORPORATION, HEREBY RATIFIES THE RECORDATION OF THIS PLAT FOR "ACOMA COURT" AND ACKNOWLEDGES THE RESPONSIBILITIES SET FORTH THEREIN.

NAME: Angela Kent

TITLE: DIRECTOR DATE: December 28, 2016

HOMEOWNERS ASSOCIATION RATIFICATION ACKNOWLEDGEMENT

STATE OF ARIZONA)
)SS
COUNTY OF MARICOPA)

BEFORE ME THIS 28th DAY OF December, 2016 PERSONALLY APPEARED BEFORE ME, THE UNDERSIGNED NOTARY PUBLIC, WHO ACKNOWLEDGED HERSELF TO BE

Angela Kent OF Garrett Walker Homes, ACOMA COURT HOMEOWNERS ASSOCIATION ACKNOWLEDGE THAT Angela Kent AS Director EXECUTED THIS INSTRUMENT FOR THE PURPOSES HEREIN CONTAINED

IN WITNESS WHEREOF, I HEREUNTO SET MY HAND AND OFFICIAL SEAL

Ramona Nielsen NOTARY PUBLIC
02-26-2019 EXPIRES

CITY OF SURPRISE ENGINEER APPROVAL:

DATA ON THIS PLAT REVIEWED AND APPROVED THIS _____ DAY OF _____, 20____ BY THE CITY ENGINEER OF SURPRISE, ARIZONA.

APPROVED _____ DATE _____
CITY ENGINEER

CITY OF SURPRISE COUNCIL APPROVAL:

APPROVED BY THE CITY COUNCIL OF SURPRISE, ARIZONA, THIS _____ DAY OF _____, 20____

MAYOR

DATE

ATTEST

CITY CLERK

DATE

CERTIFICATION

I, ERIC G. COFFEY, HEREBY CERTIFY THAT I AM A REGISTERED LAND SURVEYOR IN THE STATE OF ARIZONA, THAT THIS MAP, CONSISTING OF FOUR (4) SHEETS, CORRECTLY REPRESENTS A BOUNDARY SURVEY MADE UNDER MY SUPERVISION DURING THE MONTHS OF JULY, 2015 AND NOVEMBER, 2016, THAT THE SURVEY IS TRUE AND COMPLETE AS SHOWN, THAT ALL MONUMENTS SHOWN ACTUALLY EXIST OR WILL BE SET AS SHOWN, THAT THEIR POSITIONS ARE CORRECTLY SHOWN AND THAT SAID MONUMENTS ARE SUFFICIENT TO ENABLE THE SURVEY TO BE RETRACED.

BY: Eric G. Coffey
ERIC G. COFFEY
REGISTRATION NUMBER 42186
4550 N. 12TH STREET
PHOENIX, ARIZONA 85014
(602)-264-6831
CVLSURVEY@CVLCI.COM

100 YEAR ASSURED WATER SUPPLY

THE AREA PLATTED HEREON LIES WITHIN THE DOMESTIC GROUND WATER SERVICE AREA OF EPCOR AGUA FRIA. ACOMA COURT HAS BEEN DESIGNATED AS HAVING AN ASSURED WATER SUPPLY PURSUANT TO A.R.S. 45-576 PER ADWR CERTIFICATE NUMBER 27-700888.0000.

RELEASE OF LIABILITY

ACOMA COURT, LLC, AN ARIZONA LIMITED LIABILITY COMPANY ("OWNER") DOES HEREBY (1) RELEASE AND DISCHARGE THE USAF AND THE CITY OF SURPRISE, AND (2) INDEMNIFY, DEFEND, AND HOLD HARMLESS THE CITY OF SURPRISE, OF AND FROM ANY LIABILITY FOR ANY AND ALL CLAIMS FOR DAMAGES OF ANY KIND TO PERSONS OR PROPERTY THAT MAY ARISE AT ANY TIME IN THE FUTURE OVER, OR IN CONNECTION WITH AIRCRAFT OVERFLIGHTS FROM AIRCRAFT UTILIZING LUKE AIR FORCE BASE, WHETHER SUCH DAMAGE SHALL ORIGINATE FROM NOISE, VIBRATION, FUMES, DUST, FUEL AND LUBRICANT PARTICLES, AND ALL OTHER EFFECTS THAT MAY BE CAUSED BY THE OPERATION OF AIRCRAFT LANDING AT, OR TAKING OFF FROM, OR OPERATING AT OR ON LUKE AIR FORCE BASE. THIS INSTRUMENT SHALL RUN WITH THE LAND AND BE BINDING UPON OWNER AND ITS HEIRS, ASSIGNS, AND SUCCESSORS IN INTEREST TO THIS PLAT OR ANY PARCEL OR LOT THEREOF. THIS INSTRUMENT DOES NOT RELEASE THE USAF FROM LIABILITY FOR DAMAGE OR INJURY TO PERSON OR PROPERTY CAUSED BY FALLING AIRCRAFT OR FALLING PHYSICAL OBJECTS FROM AIRCRAFT, EXCEPT AS STATED HEREIN WITH RESPECT TO NOISE, FUMES, DUST, FUEL, AND LUBRICANT PARTICLES.

OWNER HEREBY FURTHER AGREES TO INDEMNIFY, DEFEND, AND HOLD HARMLESS THE CITY OF SURPRISE FROM ANY AND ALL CLAIMS FOR DAMAGES OF ANY KIND TO PERSONS OR PROPERTY THAT MAY ARISE IN CONNECTION WITH THE USE OF THE SIDEWALKS LOCATED WITHIN THE RIGHT-OF-WAY.

SURPRISE CASE NUMBER: FS16-321

GROSS AREA = 29.551 ACRES

NUMBER OF LOTS = 117

SEE SHEET 2 FOR CURVE

TABLE AND LOT AREA TABLE

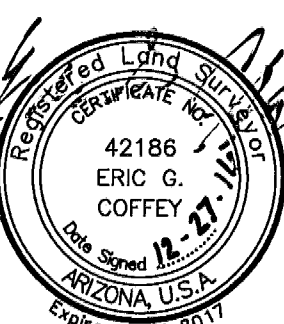
DATE

REVISION

NO.

FINAL PLAT

ACOMA COURT
SURPRISE, ARIZONA



1 SHEET OF 4

CVL Contact: DOUG CHUBIN

CVL Project #: 01-0274401

CVL File #: 58/2/P17

CVL CONSULTANTS
4550 North 12th Street
Phoenix, Arizona 85014
602-264-6831
www.cvlci.com

Coe & Van Loo Consultants, Inc.

LEGAL DESCRIPTION

PARCEL NO. 1:

THAT PORTION OF THE SOUTHWEST QUARTER OF THE NORTHEAST QUARTER OF SECTION 7, TOWNSHIP 3 NORTH, RANGE 1 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE EAST QUARTER CORNER OF SAID SECTION 7;

THENCE NORTH 89 DEGREES 36 MINUTES 26 SECONDS WEST, 2281.33 FEET ALONG THE EAST-WEST MIDSECTION LINE OF SAID SECTION 7 TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89 DEGREES 36 MINUTES 26 SECONDS WEST 366.23 FEET TO THE CENTER POINT OF SAID SECTION 7;

THENCE NORTH 00 DEGREES 45 MINUTES 35 SECONDS WEST, ALONG THE NORTH-SOUTH MID- SECTION LINE, 1320.65 FEET TO A POINT ON THE NORTH LINE OF THE SOUTH HALF OF THE NORTHEAST QUARTER OF SAID SECTION 7;

THENCE SOUTH 89 DEGREES 16 MINUTES 04 SECONDS EAST 363.88 FEET;

THENCE SOUTH 00 DEGREES 51 MINUTES 40 SECONDS EAST, 1320.66 FEET TO THE POINT OF BEGINNING;

EXCEPT THE NORTH 25 FEET AS CONVEYED TO THE COUNTY OF MARICOPA, A POLITICAL SUBDIVISION OF THE STATE OF ARIZONA IN DEED RECORDED IN BOOK 234 OF DEEDS, PAGE 418, M.C.R.

PARCEL NO. 2:

A PORTION OF THE SOUTHWEST QUARTER OF THE NORTHEAST QUARTER OF SECTION 7, TOWNSHIP 3 NORTH, RANGE 1 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE EAST QUARTER CORNER OF SAID SECTION 7;

THENCE NORTH 89 DEGREES 36 MINUTES 26 SECONDS WEST, 1974.24 FEET ALONG THE EAST-WEST ONE QUARTER LINE OF SAID SECTION 7 TO THE TRUE POINT OF BEGINNING OF THIS DESCRIPTION;

THENCE CONTINUING ALONG SAID EAST-WEST ONE QUARTER SECTION LINE, NORTH 89 DEGREES 36 MINUTES 26 SECONDS WEST, 307.09 FEET;

THENCE NORTH 00 DEGREES 51 MINUTES 40 SECONDS WEST, 1320.66 FEET TO A POINT ON THE NORTH LINE OF THE SOUTH HALF OF THE NORTHEAST QUARTER OF SAID SECTION 7;

THENCE SOUTH 89 DEGREES 36 MINUTES 04 SECONDS EAST 448.10 FEET ALONG SAID NORTH LINE OF THE SOUTH HALF OF THE NORTHEAST QUARTER;

THENCE SOUTH 00 DEGREES 40 MINUTES 49 SECONDS EAST, 239.09 FEET;

THENCE SOUTH 89 DEGREES 08 MINUTES 20 SECONDS WEST 140.22 FEET;

THENCE SOUTH 00 DEGREES 51 MINUTES 40 SECONDS EAST, 1078.44 FEET TO THE TRUE POINT OF BEGINNING;

EXCEPT THE NORTH 25 FEET AS CONVEYED TO THE COUNTY OF MARICOPA, A POLITICAL SUBDIVISION OF THE STATE OF ARIZONA IN DEED RECORDED IN BOOK 234 OF DEEDS, PAGE 418, M.C.R.

PARCEL NO. 3:

A PORTION OF THE SOUTHWEST QUARTER OF THE NORTHEAST QUARTER OF SECTION 7, TOWNSHIP 3 NORTH, RANGE 1 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE EAST QUARTER CORNER OF SAID SECTION 7;

THENCE NORTH 89 DEGREES 36 MINUTES 26 SECONDS WEST, 1654.73 FEET, TO A POINT ON THE EAST LINE OF THE WEST HALF OF THE EAST HALF OF THE SOUTHWEST QUARTER OF THE NORTHEAST QUARTER OF SAID SECTION 7 AND THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89 DEGREES 36 MINUTES 26 SECONDS WEST 319.51 FEET;

THENCE NORTH 00 DEGREES 51 MINUTES 40 SECONDS WEST 1078.44 FEET;

THENCE NORTH 89 DEGREES 08 MINUTES 20 SECONDS EAST 140.22 FEET;

THENCE NORTH 00 DEGREES 40 MINUTES 49 SECONDS WEST 239.09 FEET;

THENCE SOUTH 89 DEGREES 16 MINUTES 04 SECONDS EAST 182.67 FEET TO A POINT ON THE EAST LINE OF THE WEST HALF OF THE EAST HALF OF THE SOUTHWEST QUARTER OF THE NORTHEAST QUARTER OF SAID SECTION 7;

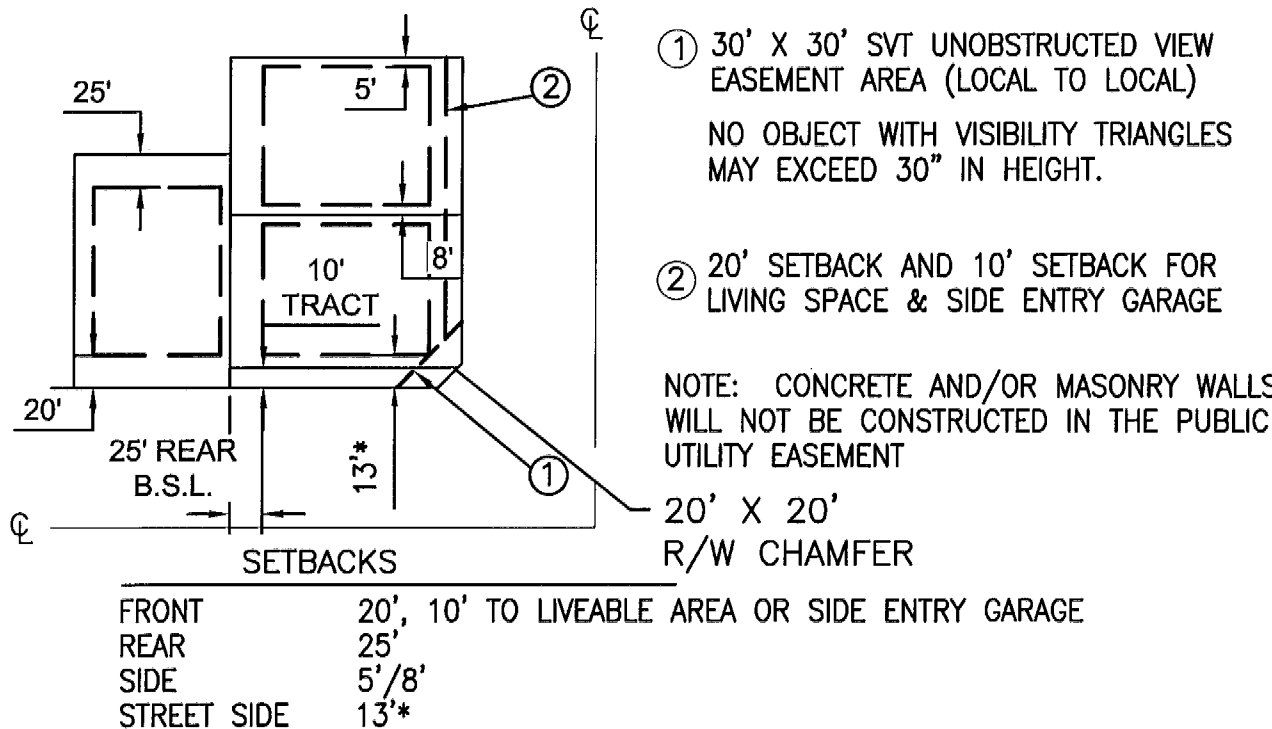
THENCE SOUTH 00 DEGREES 40 MINUTES 49 SECONDS EAST, ALONG THE EAST LINE OF THE WEST HALF OF THE EAST HALF OF THE SOUTHWEST QUARTER OF THE NORTHEAST QUARTER OF SAID SECTION 7 A DISTANCE OF 1320.51 FEET TO THE POINT OF BEGINNING;

EXCEPT THE NORTH 25 FEET AS CONVEYED TO THE COUNTY OF MARICOPA, A POLITICAL SUBDIVISION OF THE STATE OF ARIZONA IN DEED RECORDED IN BOOK 234 OF DEEDS, PAGE 418, M.C.R.

TOTAL LAND USE	
TOTAL NUMBER OF LOTS	117
TOTAL NUMBER OF TRACTS	13
GROSS RESIDENTIAL DENSITY	3.96 D.U./A.C.

LINE TABLE		
NO.	LENGTH	BEARING
L1	28.28	N45°23'33"E
L2	28.28	N44°36'27"W
L3	28.28	N45°23'33"E
L4	28.28	N44°36'27"W
L5	28.28	N44°36'27"W
L6	28.28	N45°23'28"E
L7	28.28	N44°36'32"W
L8	28.28	N45°23'33"E
L9	28.28	N44°36'27"W
L10	28.28	N45°23'33"E
L11	28.28	N45°23'37"E
L12	28.28	N44°36'23"W
L13	28.28	N44°36'23"W
L14	28.28	N45°23'37"E
L15	28.28	N44°36'23"W
L16	28.28	N45°23'37"E
L17	28.28	N45°23'37"E
L18	28.28	N44°36'23"W
L19	28.28	N45°23'37"E
L20	28.28	N44°36'23"W
L21	4.00	N00°23'37"E

TRACT TABLE		
TRACT	AREA	DESCRIPTION
TRACT A	0.309 ACRES	OPEN SPACE, LANDSCAPE TRACT, RETENTION, SIDEWALK EASEMENT
TRACT B	0.349 ACRES	OPEN SPACE, LANDSCAPE TRACT, RETENTION, SIDEWALK EASEMENT
TRACT C	0.053 ACRES	LANDSCAPE TRACT, P.U.E.
TRACT D	0.551 ACRES	OPEN SPACE, LANDSCAPE TRACT, RETENTION, SIDEWALK
TRACT E	0.053 ACRES	LANDSCAPE TRACT, P.U.E.
TRACT F	0.963 ACRES	OPEN SPACE, LANDSCAPE TRACT, RETENTION, DG TRAIL, SIDEWALK EASEMENT
TRACT G	0.928 ACRES	LANDSCAPE TRACT, SIDEWALK, RETENTION, OPEN SPACE
TRACT H	0.052 ACRES	LANDSCAPE TRACT, P.U.E.
TRACT I	0.053 ACRES	LANDSCAPE TRACT, P.U.E.
TRACT J	0.546 ACRES	LANDSCAPE TRACT, SIDEWALK, RETENTION, OPEN SPACE
TRACT K	0.053 ACRES	LANDSCAPE TRACT, P.U.E.
TRACT L	0.287 ACRES	OPEN SPACE, LANDSCAPE TRACT, RETENTION,
TRACT M	5.115 ACRES	PRIVATE DRIVE, SIDEWALK, P.U.E., PUBLIC SEWER MAIN EASEMENT & EPCOR WATER MAIN EASEMENT
TOTAL	9.312 ACRES	



TYPICAL 48' AND 58' MINIMUM WIDE LOT

AND SETBACKS DETAIL

(NOT TO SCALE)

*STREET SIDE SETBACK MAY BE REDUCED BY 5' IF A 10' LANDSCAPE TRACT IS USED ON THE STREET SIDE.

BASIS OF BEARING

THE BASIS OF BEARINGS FOR THIS SURVEY IS EAST LINE OF THE NORTHEAST QUARTER OF SECTION 7, TOWNSHIP 3 NORTH, RANGE 1 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY RECORDS. HAVING A BEARING OF NORTH 00°33'33" WEST, ACCORDING TO BOOK 613 OF MAPS, PAGE 4, MARICOPA COUNTY RECORDS.

CURVE TABLE						
NO.	ARC	RADIUS	DELTA	TANGENT	CHORD	CHORD-BEARING
C1	16.65	55.00	017°20'29"	8.39	16.58	N80°56'17"W
C2	119.69	55.00	124°40'58"	104.94	97.43	N45°23'28"E
C3	16.65	55.00	017°20'29"	8.39	16.58	S08°16'46"E
C4	16.65	55.00	017°20'29"	8.39	16.58	S81°43'14"W
C5	119.69	55.00	124°41'07"	104.95	97.43	S44°36'27"E
C6	16.65	55.00	017°20'29"	8.39	16.58	N09°03'52"E
C7	16.65	55.00	017°20'29"	8.39	16.58	N08°16'37"W
C8	119.68	55.00	124°40'49"	104.94	97.43	S45°23'33"W
C9	16.65	55.00	017°20'29"	8.39	16.58	S80°56'17"E
C10	16.65	55.00	017°20'29"	8.39	16.58	S09°03'43"W
C11	119.69	55.00	124°40'58"	104.94	97.43	N44°36'32"W
C12	16.65	55.00	017°20'29"	8.39	16.58	N81°43'14"E
C13	16.65	55.00	017°20'29"	8.39	16.58	S81°43'23"W
C14	119.69	55.00	124°40'58"	104.94	97.43	S44°36'23"E
C15	16.65	55.00	017°20'29"	8.39	16.58	N09°03'52"E
C16	16.65	55.00	017°20'29"	8.39	16.58	N80°56'08"W
C17	119.69	55.00	124°40'58"	104.94	97.43	N45°23'37"E
C18	16.65	55.00	017°20'29"	8.39	16.58	S08°16'37"E
C19	16.65	55.00	017°20'29"	8.39	16.58	S09°03'52"W
C20	119.69	55.00	124°40'58"	104.94	97.43	N44°36'23"W
C21	16.65	55.00	017°20'29"	8.39	16.58	N81°43'23"E
C22	16.65	55.00	017°20'29"	8.39	16.58	N08°16'37"W
C23	119.69	55.00	124°40'58"	104.94	97.43	S45°23'37"W
C24	16.65	55.00	017°20'29"	8.39	16.58	S80°56'08"E

PARCEL AREA TABLE		
PARCEL	AREA (SQUARE FEET)	AREA (ACRES)
1	6,000	0.138
2	6,000	0.138
3	6,000	0.138
4	6,000	0.138
5	6,000	0.138
6	6,000	0.138
7	6,000	0.138
8	6,000	0.138
9	6,000	0.138
10	6,059	0.139
11	6,707	0.154
12	6,240	0.143
13	6,240	0.143
14	6,240	0.143
15	6,240	0.143
16	6,240	0.143
17	6,240	0.143
18	6,240	0.143
19	6,240	0.143
20	6,240	0.143
21	6,190	0.142
22	6,190	0.142
23	6,240	0.143
24	6,240	0.143
25	6,240	0.143
26	6,240	0.143
27	6,240	0.143
28	6,240	0.143
29	6,240	0.143
30	6,240	0.143
31	6,240	0.143
32	7,540	0.173
33	7,540	0.173
34	7,490	0.172
35	7,490	0.172
36	7,540	0.173
37	7,540	0.173
38	7,829	0.180
39	7,829	0.180
40	7,750	0.178
41	13,800	0.317
42	12,879	0.296
43	7,484	0.172
44	7,461	0.171
45	7,393	0.170
46	7,265	0.167
47	14,252	0.327
48	15,811	0.363
49	7,541	0.173
50	7,607	0.175
51	7,557	0.173
52	6,296	0.145
53	6,296	0.145
54	6,296	0.145
55	6,296	0.145
56	6,296	0.145
57	6,295	0.145
58	6,295	0.145
59	6,140	0.141

PARCEL AREA TABLE		
PARCEL	AREA (SQUARE FEET)	AREA (ACRES)
60	6,179	0.142
61	6,295	0.145
62	6,295	0.145
63	6,295	0.145
64	6,295	0.145
65	6,295	0.145
66	6,295	0.145
67	6,295	0.145
68	7,558	0.174
69	7,608	0.175
70	8,407	0.193
71	18,367	0.422
72	12,444	0.286
73	7,506	0.172
74	7,449	0.171
75	7,381	0.169
76	7,204	0.165
77	13,154	0.302
78	12,409	0.285
79	7,807	0.179
80	7,830	0.180
81	7,817	0.179
82	7,540	0.173
83	7,540	0.173
84	7,490	0.172
85	7,490	0.172
86	7,540	0.173
87	7,540	0.173
88	6,240	0.143
89	6,240	0.143
90	6,240	0.143
91	6,240	0.143
92	6,240	0.143
93	6,240	0.143
94	6,240	0.143
95	6,240	0.143
96	6,240	0.143
97	6,190	0.142
98	6,190	0.142
99	6,240	0.143
100	6,240	0.143
101	6,240	0.143
102	6,240	0.143
103	6,240	0.143
104	6,240	0.143
105	6,240	0.143
106	6,240	0.143
107	6,240	0.143
108	6,327	0.145
109	6,480	0.149
110	6,480	0.149
111	6,480	0.149
112	6,480	0.149
113	6,480	0.149
114	6,480	0.149
115	6,480	0.149
116	6,480	0.149
117	6,467	0.148
TOTAL	836,932	19.213

ROW AREA TABLE		
PARCEL	AREA (SQUARE FEET)	AREA (ACRES)
NEW R/W	44,690	1.026
EXISTING R/W	24,874	0.571
TOTAL	69,564	1.597

NOTES

- SPRINKLERS ARE REQUIRED IN ALL ONE AND TWO FAMILY DWELLINGS BUILT IN AREAS WHICH DO NOT HAVE AN ADEQUATE WATER SUPPLY.
- THE PROPERTY OWNER AT THE TIME WHEN CITY OF SURPRISE WATER, AND/OR SEWER INFRASTRUCTURE IS AVAILABLE AT THE PROPERTY, SHALL BE REQUIRED TO CONNECT IN ACCORDANCE WITH SURPRISE MUNICIPAL CODE AND PAY ALL APPLICABLE FEES. ANY OWNER OF THE PROPERTY SHALL NOTIFY PROSPECTIVE BUYERS AND THE PUBLIC OF THIS NOTE, AND SALES CONTRACT, REPORT SHALL CONTAIN SUCH NOTE.
- THE PROPERTY OWNERS, OR ANY SUBSEQUENT OWNERS SHALL NOT PROCEED WITH ANY ON SITE GRADING OR EXCAVATION WITHOUT FIRST OBTAINING A PERMIT FROM THE CITY OF SURPRISE.
- THE PROPERTY IS LOCATED WITHIN AN AREA HAVING FLOOD ZONE "X." BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY, ON FLOOD INSURANCE RATE MAP NO. 04013C-1660L, WITH A DATE OF IDENTIFICATION OF OCTOBER 16, 2013. FOR COMMUNITY NO. 040053, IN MARICOPA COUNTY, STATE OF ARIZONA, WHICH IS THE CURRENT FLOOD INSURANCE RATE MAP FOR THE COMMUNITY IN WHICH SAID PROPERTY IS SITUATED.
- THE ROADS DESIGNATED AS "PRIVATE" AND ANY APPURTENANCES INCLUDING BUT NOT LIMITED TO ROAD SIGNS, STRIPING, CURB AND GUTTER, AND SIDEWALKS ARE PRIVATE; SUCH ROADS AND APPURTENANCES ARE OWNED, MAINTAINED AND REPAIRED BY OWNER OR THE HOMEOWNER'S ASSOCIATION FORMED BY OWNER. THE CITY OF SURPRISE SHALL NOT MAINTAIN OR REPAIR ANY ROAD DESIGNATED AS "PRIVATE."
- IN ACCORDANCE WITH ARS § 9-461.07, THE CITY OF SURPRISE HAS DETERMINED THAT ALL DEDICATIONS OCCURRING WITH THIS PLAT ARE IN CONFORMANCE WITH THE SURPRISE GENERAL PLAN.
- PURSUANT TO A.R.S. § 42-11102, THE CITY OF SURPRISE, A POLITICAL SUBDIVISION OF THE STATE OF ARIZONA, IS EXEMPT FROM ALL TAXES AND ASSESSMENTS BASED ON ASSESSED VALUE EXCEPT FOR SPECIAL DISTRICTS #14751 AND 14710, WHEN APPLICABLE.

LEGEND

- INDICATES SECTION CORNER - FOUND BRASS CAP (UNLESS OTHERWISE NOTED)
- INDICATES CENTER LINE MONUMENTATION - SET BRASS CAP FLUSH UPON COMPLETION OF JOB PER M.A.G. STD. DET.120, TYPE "B" (UNLESS OTHERWISE NOTED)
- INDICATES CORNER OF SUBDIVISION - SET BRASS CAP UPON COMPLETION OF JOB PER M.A.G. STD. DET. 120, TYPE "B" (UNLESS OTHERWISE NOTED)
- INDICATES CORNER OF THIS SUBDIVISION - SET SURVEY MARKER PER M.A.G. STD DET. 120, TYPE "C" - MODIFIED (UNLESS OTHERWISE NOTED)
- INDICATES SECTION LINE
- INDICATES MID-SECTION LINE
- INDICATES BOUNDARY LINE
- INDICATES LOT LINE
- INDICATES CENTERLINE
- INDICATES EASEMENT
- INDICATES EXISTING R/W
- INDICATES SHEET NUMBER
- INDICATES SIGHT VISIBILITY TRIANGLE - 30X30
- P.U.E. PUBLIC UTILITY EASEMENT
- V.N.A.E. VEHICULAR NON ACCESS EASEMENT
- AC. ACRES
- L1 INDICATES LINE NUMBER
- C1 INDICATES CURVE NUMBER
- C.S. CORNER OF SUBDIVISION
- R/W RIGHT-OF-WAY
- M.C.R. MARICOPA COUNTY RECORDER
- DOC.# DOCUMENT NUMBER
- A.P.N. ASSESSOR PARCEL NUMBER
- D.E. DRAINAGE EASEMENT
- DR. DRIVE
- LN. LANE
- ST. STREET
- EX. EXISTING
- M.W.D. MARICOPA WATER DISTRICT
- S.W.E. SIDEWALK EASEMENT

COUNTY RECORDER



DATE

REVISION

NO

FINAL PLAT

ACOMA COURT
SURPRISE, ARIZONA



NORTH 1/4 CORNER, SECTION 7
TOWNSHIP 3 NORTH, RANGE 1 WEST
FOUND CITY OF SURPRISE BRASS CAP IN
HANDHOLE

12' M.W.D. LATERAL 5 SUBLATERAL H ROW
BOOK 14, PAGE 35; BOOK 24, PAGE 3;
MCR NO. 00-0953311;
MCR NO. 00-0962232;
MCR NO. 01-0576788

LEGACY PARC PARCEL C
BOOK 547, PAGE 25
M.C.R.

WEST GREENWAY ROAD

S89°35'59"E 2657.31'

COUNTY RECORDER

NORTHEAST CORNER, SECTION 7
TOWNSHIP 3 NORTH, RANGE 1 WEST
FOUND CITY OF SURPRISE BRASS CAP IN
HAND HOLE

APN 501-92-298
GREENWAY PARC AT SURPRISE ONE
BOOK 506, PAGE 02
M.C.R.

EXISTING 25' IRRIGATION
EASEMENT FOR MWD
FUTURE USE PER IGA

10' MWD EASEMENT

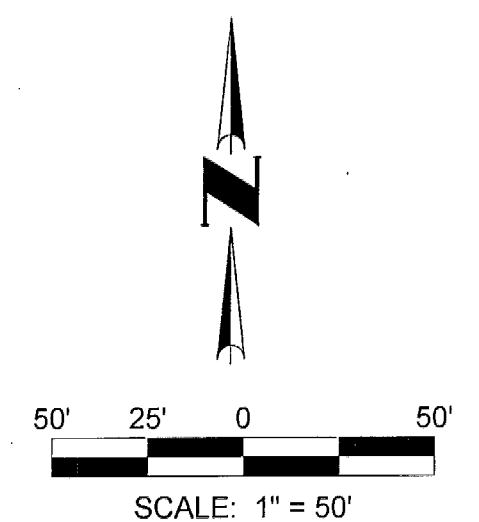
5' S.W.E.

8' P.U.E.

APN 501-77-963A
GARDEN TRADITIONAL
SCHOOL OF SURPRISE INC.

APN 501-77-962
LEARNING MATTERS
CHARTER SCHOOL

MATCH SHEET 4

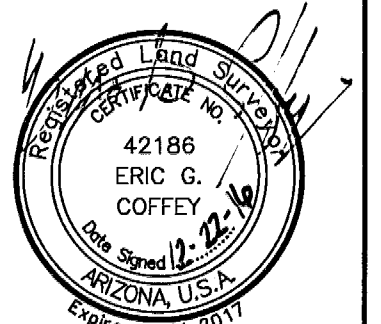


NO.	REVISION	DATE

FINAL PLAT

ACOMA COURT
SURPRISE, ARIZONA

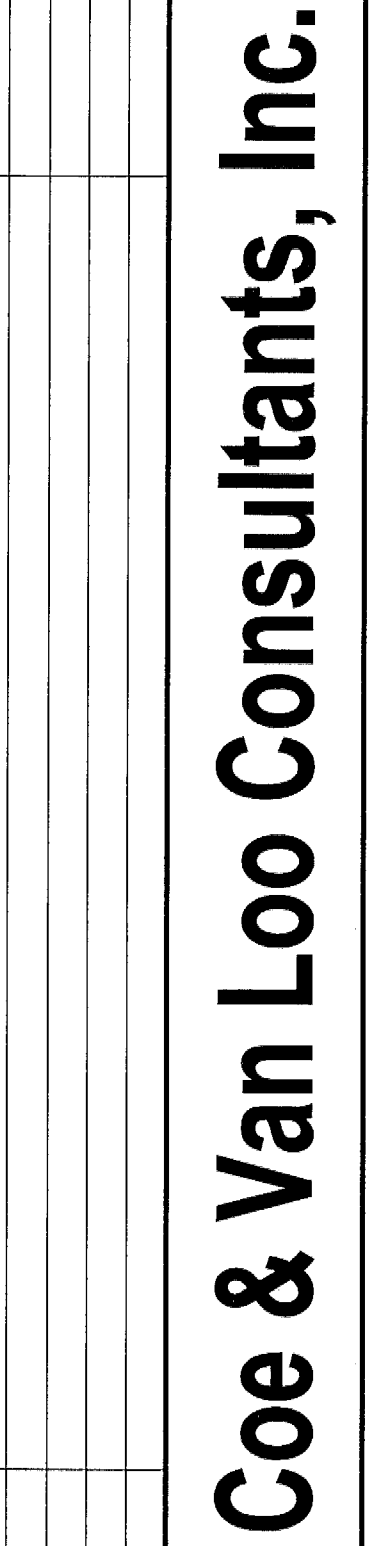
Coe & Van Loo Consultants, Inc.



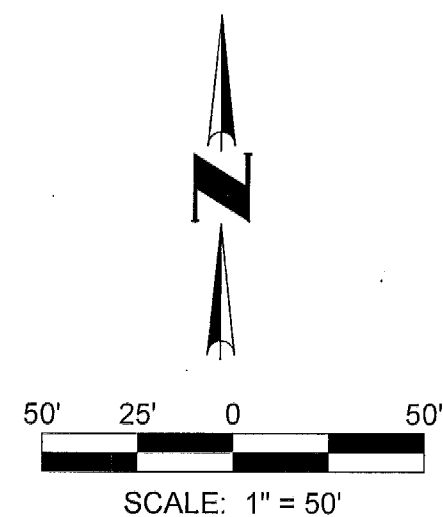
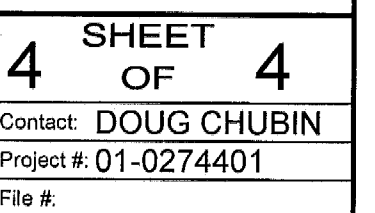
3 SHEET OF 4
CVL Contact: DOUG CHUBIN
CVL Project #: 01-0274401
CVL File #: 58/2.P17

CVL CONSULTANTS
4550 North 12th Street
Phoenix, Arizona 85014
602-264-6831
www.cvlci.com

COUNTY RECORDER	



ACOMA COURT
SURPRISE, ARIZONA



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LANDSCAPE AND IRRIGATION PLANS FOR ACOMA COURT 159TH AVENUE AND ACOMA DRIVE

A PORTION OF LAND LOCATED IN THE NORTHEAST QUARTER OF SECTION 7, TOWNSHIP 3 NORTH, RANGE 1
WEST, OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA

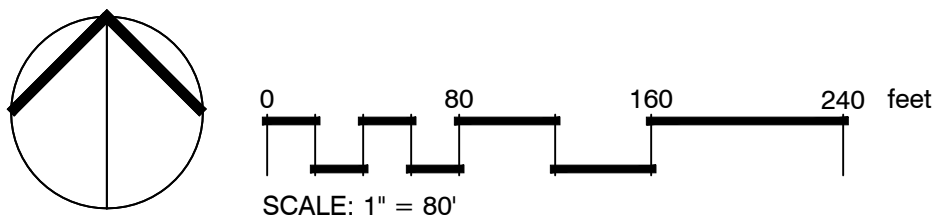
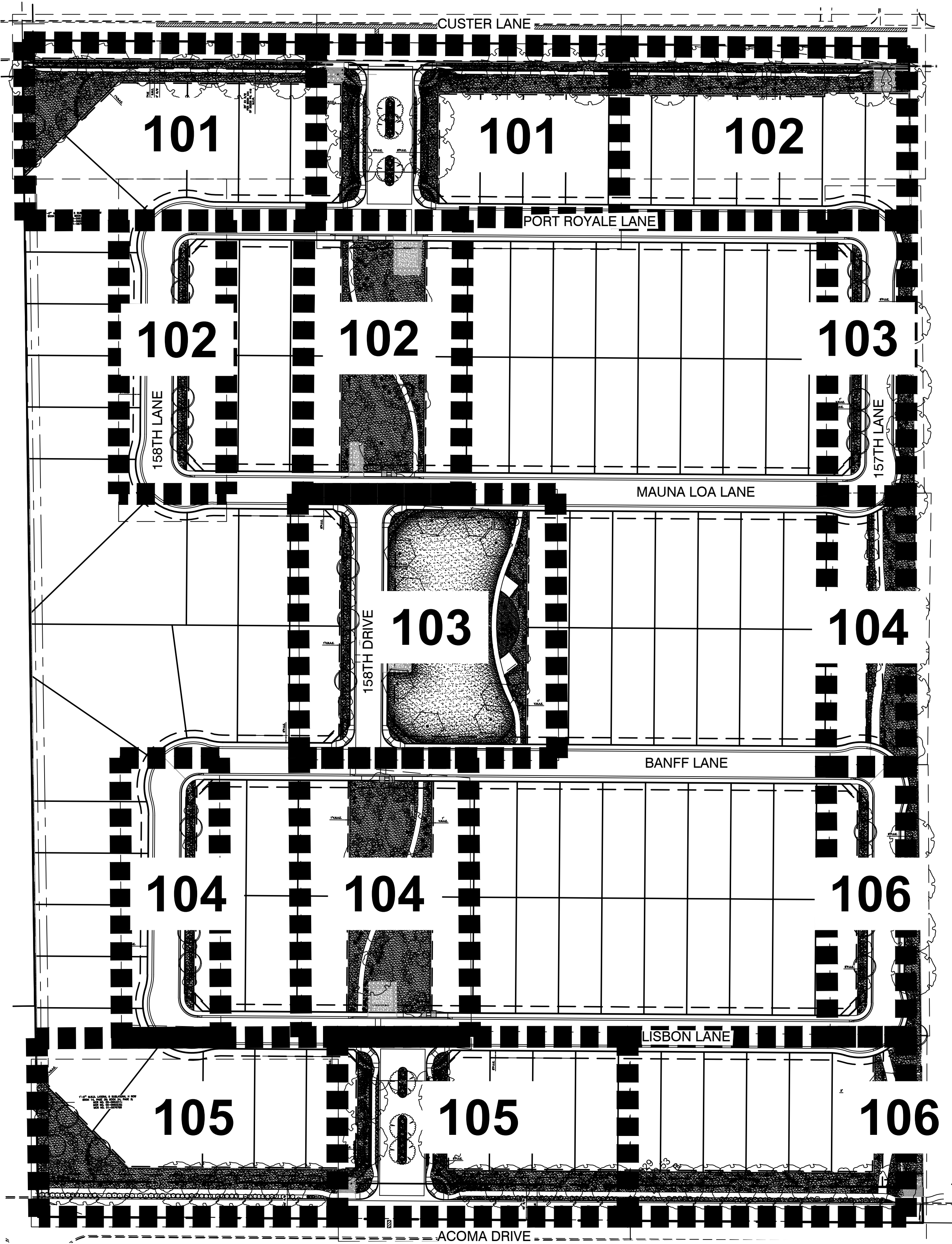
SHEET INDEX

SHEET	DESCRIPTION	SHEET NUMBER
LC.001	COVER SHEETS	1
LP.001	PLANTING NOTES AND SCHEDULES	2
LP.101-LP.106	PLANTING PLANS	3-8
LP.201	PLANTING DETAILS	9
LP.301	PLANTING SPECIFICATIONS	10
LI.001	IRRIGATION NOTES AND SCHEDULE	11
LI.101-LI.106	IRRIGATION PLANS	12-17
LI.201	IRRIGATION DETAILS	18
LI.301	IRRIGATION SPECIFICATION	19
LH.101-LH.106	HARDSCAPE PLANS	20-25
LH.201-LH.203	HARDSCAPE DETAILS	26-28

GENERAL LANDSCAPE NOTES

- ALL TREES SHALL CONFORM TO CALIPER SIZES FROM THE ARIZONA NURSERY ASSOCIATION.
- ALL TREES PLANTED WITHIN THE RIGHT-OF-WAY, PUE OR WITHIN 10 FEET OF A SIDEWALK, CURB OR WALL SHALL REQUIRE A DEEP ROOT BARRIER PER THE CITY OF SURPRISE DETAIL 8-14 AS SHOWN WITH THE PLANTING DETAILS IN THIS PLAN SET.

LANDSCAPE TABLE	
TOTAL LANDSCAPE AREA	182,108 SF
TOTAL TURF AREA	30,953 SF
PERCENTAGE OF TURF	17%
TOTAL OPEN SPACE	9,312 AC



SHEET LAYOUT AND KEY MAP



CVL
CONSULTANTS

Civil Engineering
Water Systems
Wastewater Treatment
Land Planning
Energy
Land Survey
Landscape Architecture
Construction Management

4550 N. 12th Street
Phoenix, AZ, 85014

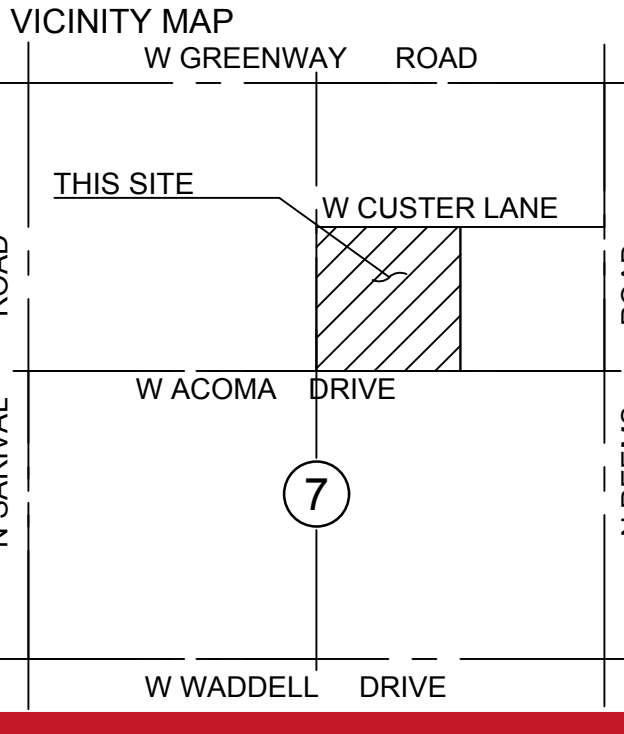
phone 602.264.6831
fax 602.264.0928
web www.cvlci.com

OWNER / DEVELOPER
GARRETT-WALKER HOMES, LLC
1838 WEST PARKSIDE LANE
SUITE 200
PHOENIX, ARIZONA 85027
CONTACT: RICK TAYRIEN
PHONE: (480) 607.6580
rtayrien@gwhoz.com

LANDSCAPE ARCHITECT
Project Manager:
COE & VAN LOO CONSULTANTS, INC.
4550 N. 12TH STREET
PHOENIX, AZ 85014
CONTACT: EARL SWETLAND
PHONE: 602.285.4786
EMAIL: ESWETLAND@CVLCI.COM

PROJECT INFORMATION
ACOMA COURT
WEST ACOMA DRIVE
SURPRISE, AZ 85379

CVL FILE NO.
01.0272201



REVISION HISTORY

SEAL & ISSUE

100%

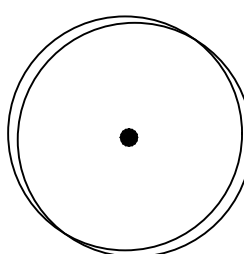
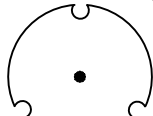
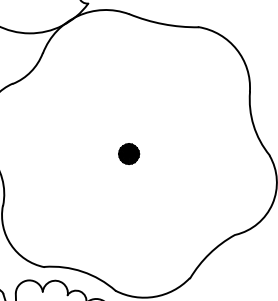
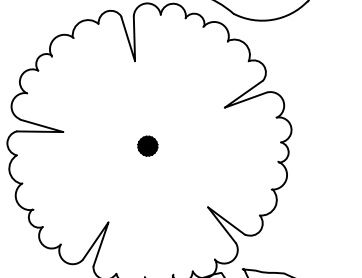
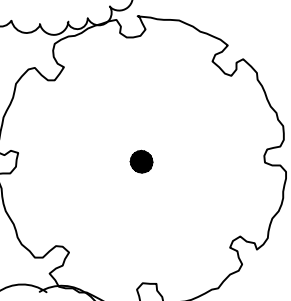
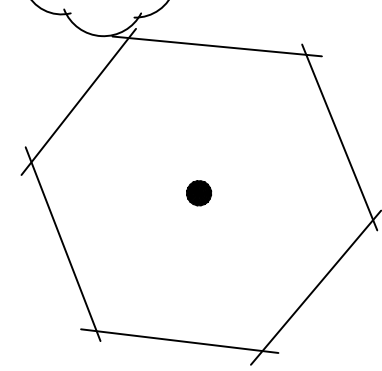
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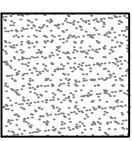


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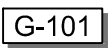
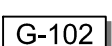
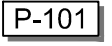
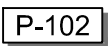
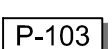
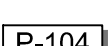
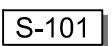
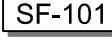
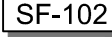
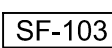
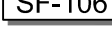
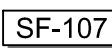
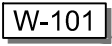
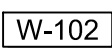
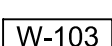
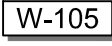
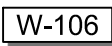
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PLANT SCHEDULE

TREES	QTY	COMMON NAME / BOTANICAL NAME	CONT
	35	DESERT WILLOW / CHILOPSIS LINEARIS	24"BOX
	36	GREGG'S ASH / FRAXINUS GREGGII	24"BOX
	14	SWAN HILL OLIVE / OLEA EUROPAEA 'SWAN HILL' TM	24"BOX
	7	CHINESE PISTACHE / PISTACIA CHINENSIS	24"BOX
	74	SOUTHERN LIVE OAK / QUERCUS VIRGINIANA	24"BOX
	79	TEXAS MOUNTAIN LAUREL / SOPHORA SECUNDIFLORA	24"BOX
	12	CHINESE ELM / ULMUS PARVIFOLIA	24"BOX
SHRUBS	QTY	COMMON NAME / BOTANICAL NAME	CONT
	439	LYRELEAF GREENEYES / BERLANDIERA LYRATA	1 GAL
	199	DWARF BOTTLE BRUSH / CALLISTEMON CITRINUS 'LITTLE JOHN'	5 GAL
	133	SPOTTED EMU BUSH / EREMOPHILA MACULATA 'VALENTINE'	5 GAL
	123	FIRE BUSH / HAMELIA PATENS	5 GAL
	171	DALLAS RED LANTANA / LANTANA CAMARA 'DALLAS RED'	5 GAL
	224	PURPLE LANTANA / LANTANA MONTEVIDENSIS 'PURPLE'	5 GAL
	178	NEW GOLD LANTANA / LANTANA X 'NEW GOLD'	5 GAL
	176	BAROMETERBUSH / LEUCOPHYLLUM LANGMANIAE 'RIO BRAVO' TM	5 GAL
	268	MUHLI / MUHLENBERGIA CAPILLARIS 'REGAL MIST' TM	5 GAL
	312	DEER GRASS / MUHLENBERGIA RIGENS	5 GAL
	139	MEXICAN OREGANO / POLIOMINTHA MADERENSIS 'LAVENDER SPICE' TM	1 GAL
	142	HUNTINGTON CARPET ROSEMARY / ROSMARINUS OFFICINALIS 'HUNTINGTON CARPET'	5 GAL
	161	WILD PETUNIA / RUELLIA PENNINSULARIS	5 GAL
	76	FIRECRACKER PLANT / RUSSELLIA EQUISETIFORMIS	5 GAL
	161	YELLOW FIRECRACKER PLANT / RUSSELLIA EQUISETIFORMIS 'LEMON FALLS'	5 GAL
	89	ORANGE JUBILEE YELLOW BELLS / TECOMA X 'ORANGE JUBILEE'	5 GAL
SUCCULENTS	QTY	COMMON NAME / BOTANICAL NAME	CONT
	282	PARRY'S AGAVE / AGAVE PARRYI	5 GAL
	18	WEBER'S AGAVE / AGAVE WEBERI	5 GAL
	44	ALOE / ALOE X 'BLUE ELF'	5 GAL

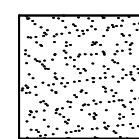
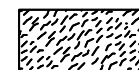
	87	TOOTHLESS SOTOL / DASYLIRION ACROTRICHE	5 GAL
	197	HESPERALOE NOCTURNA	5 GAL
	91	BRAKELIGHTS RED YUCCA / HESPERALOE PARVIFLORA 'BRAKELIGHTS' TM	5 GAL
VINE/ESPALIER	QTY	COMMON NAME / BOTANICAL NAME	CONT
	44	BARBARA KARST BOUGAINVILLEA / BOUGAINVILLEA X 'BARBARA KARST'	5 GAL
GROUND COVERS	QTY	COMMON NAME / BOTANICAL NAME	CONT
	30,953 SF	BERMUDA GRASS / CYNODON DACTYLON 'MID IRON'	FLAT

REFERENCE NOTES SCHEDULE

SYMBOL	GATES DESCRIPTION	QTY	DETAIL
	VEHICULAR GATE	4	
	PEDESTRIAN GATE	5	
SYMBOL	PAVING DESCRIPTION	QTY	DETAIL
	6" CONCRETE HEADER	888 LF	
	10" D.G. PATH	161 LF	
	6" CONCRETE PATH	821 LF	
	TOT LOT HEADER	91 LF	
SYMBOL	SITE IMPROVEMENTS DESCRIPTION	QTY	DETAIL
	DRYWELL TYP. - REFER TO CIVIL PLANS	-	
SYMBOL	SITE FURNISHINGS DESCRIPTION	QTY	DETAIL
	12" SQUARE DENVER RAMADA BY CLASSIC RECREATION SYSTEMS OR APPROVED EQUAL	2	
	6" PRESTIGE BENCH MODEL #PP402R INGROUND MOUNT BY WABASH VALLEY OR APPROVED EQUAL. COLOR: DARK BRONZE	2	
	TRASH RECEPTACLE MODEL # LR350P IN-GROUND MOUNT WITH FT105 TOP BY WABASH VALLEY OR APPROVED EQUAL. COLOR: DARK BRONZE.	2	
	6" SIGNATURE PICNIC TABLE MODEL #SG106P BY WABASH VALLEY. FRAME AND TOP COLOR: DARK BRONZE OR APPROVED EQUAL	2	
	BBQ	2	
	PLAY EQUIPMENT MODEL # 160791B BY LANDSCAPE STRUCTURES OR APPROVED EQUAL. COLOR PALETTE H	1	
	MAILBOX - APPROXIMATE LOCATION SHOWN ON PLAN, FINAL LOCATION TO BE DETERMINED BY THE U.S. POSTAL SERVICE	2	
SYMBOL	WALL DESCRIPTION	QTY	DETAIL
	6" THEME WALL	2,503 LF	
	6" SECONDARY WALL	2,065 LF	
	6" PARTIAL VIEW WALL	1,462 LF	
	THEME PANEL	431 LF	
	END OF WALL COLUMN	28 EA	

LIGHTING SCHEDULE

<u>SYMBOL</u>	<u>MANUFACTURER/MODEL/DESCRIPTION</u>	<u>QTY</u>	<u>DETAIL</u>	<u>MATERIAL</u>	<u>FINISH</u>
	FX LUMINAIRE NP - LED	6		ALUMINUM ALLOY	(BZ) BRONZE METALLIC

<u>GROUND COVERS</u>	<u>QTY</u>	<u>COMMON NAME / BOTANICAL NAME</u>	<u>CONT</u>
	189,586 SF	DECOMPOSED GRANITE / GRANITE DECOMPOSED 1/2" SCREENED, COLOR: MADISON GOLD	1/2" SCREENED
	1,346 SF	WOOD FIBER PLAY SURFACING / WOOD FIBER NATURAL	FLAT



Civil Engineering

Water Systems

Wastewater Treatment

Land Planning

Energy

Land Survey

Landscape Architecture

Construction Management

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PROJECT INFORMATION
ACOMA COURT
WEST ACOMA DRIVE
SURPRISE, AZ 85379
CVL FILE NO.
01.0272201

REVISION HISTORY

SEAL & ISSUE

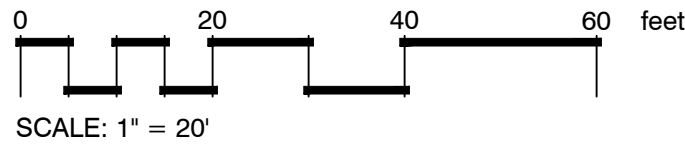
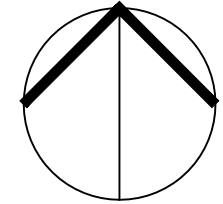
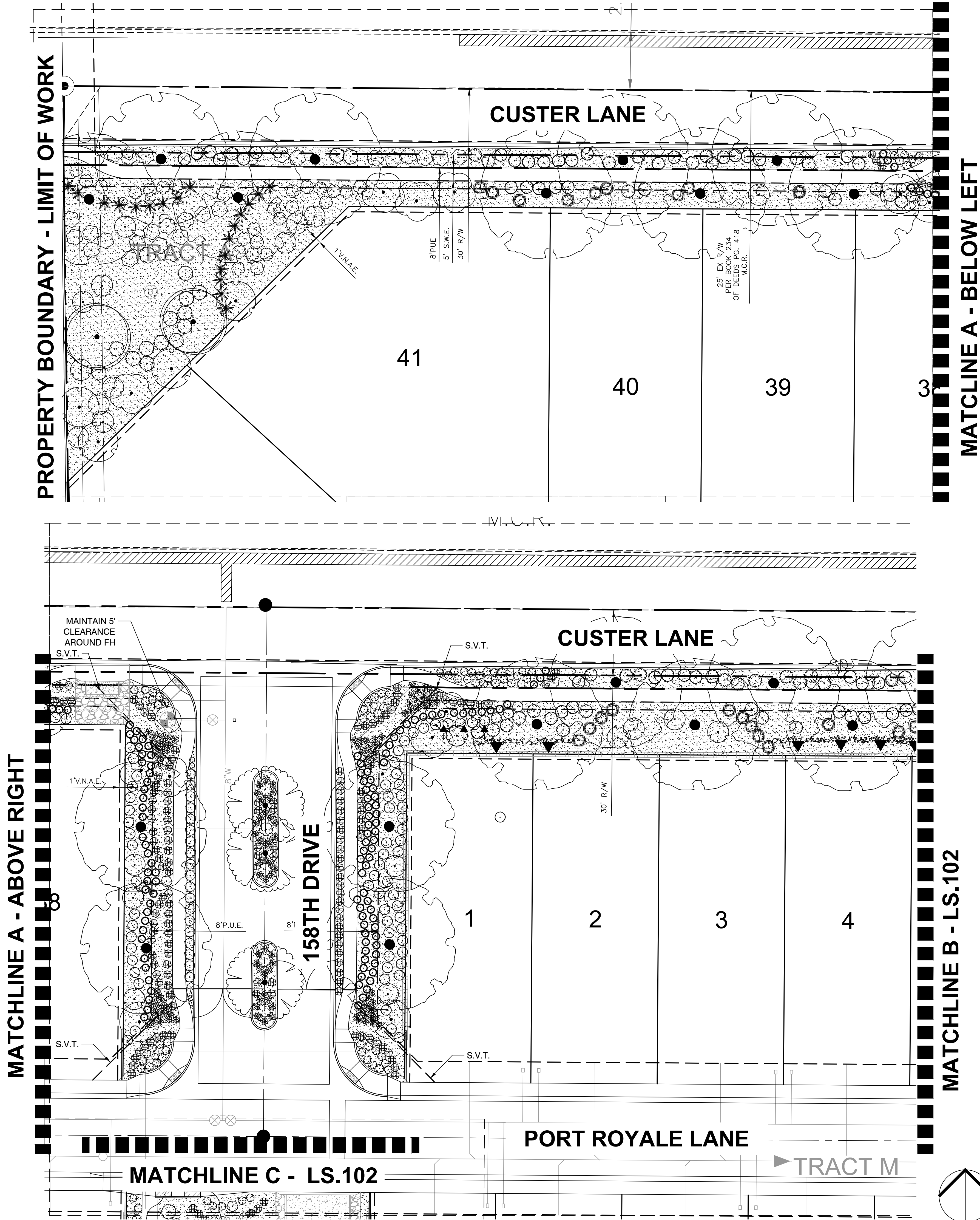
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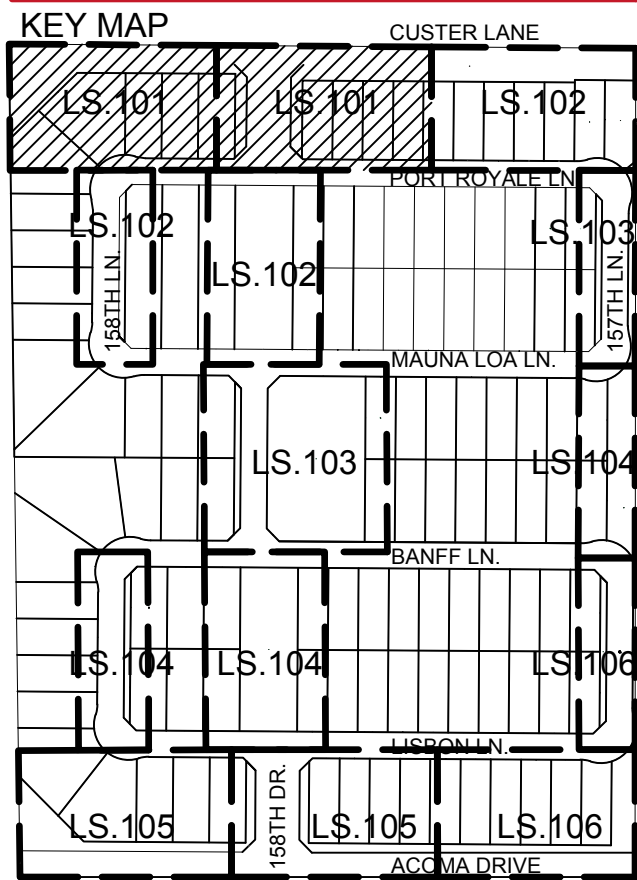
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2 of 28
FS16-321



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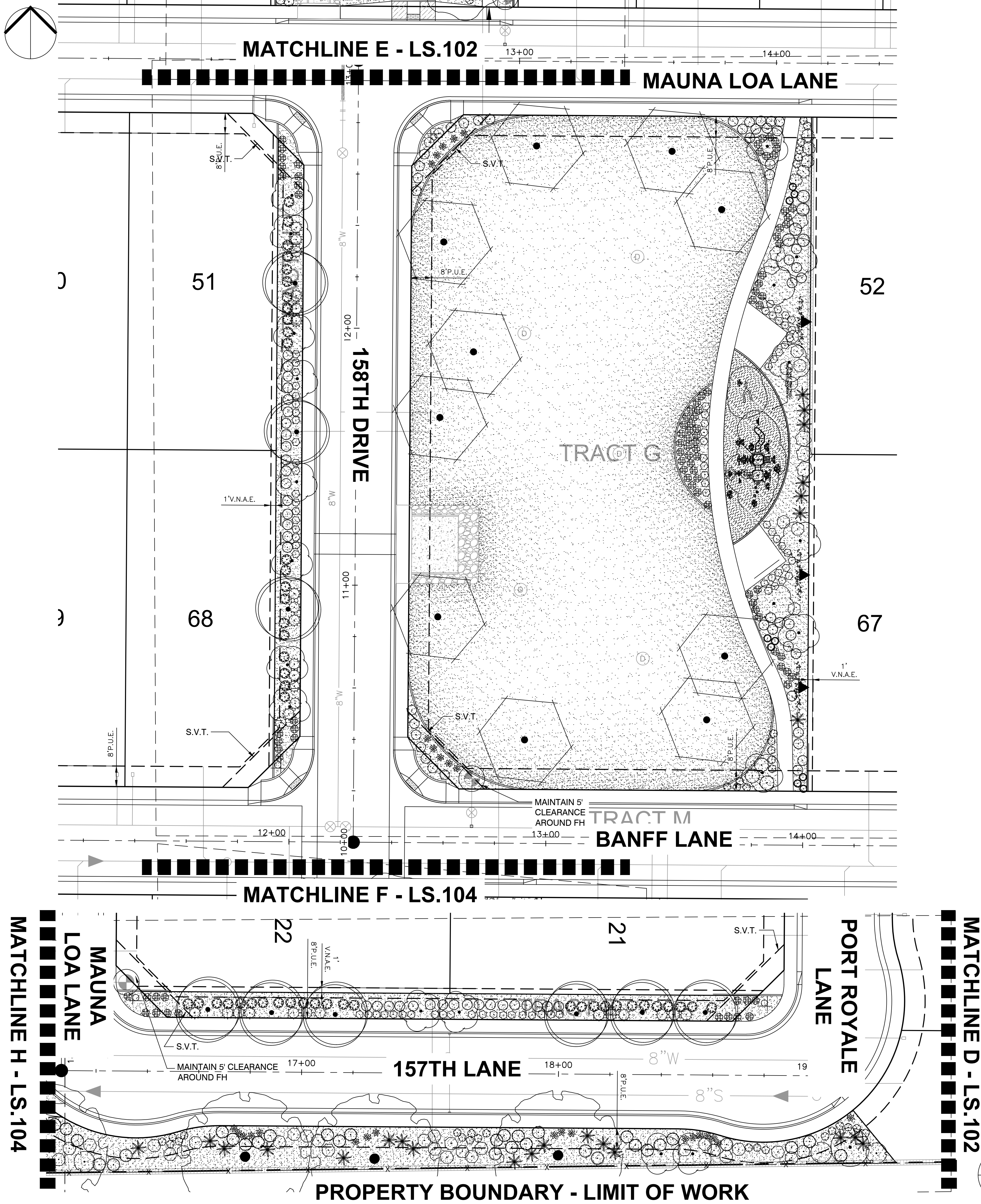
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21411
EARL J. SWETLAND
9/22/16
ARIZONA U.S.A.
Expires 6-30-2016

DISCIPLINE: LANDSCAPE ARCHITECTURE
PLANTING PLAN

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FS16-321



Civil Engineering
Water Systems
Wastewater Treatment
Land Planning
Energy
Land Survey
Landscape Architecture
Construction Management

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PROJECT INFORMATION
ACOMA COURT
WEST ACOMA DRIVE
SURPRISE, AZ 85379

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KEY MAP

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NO.	DESCRIPTION	DATE
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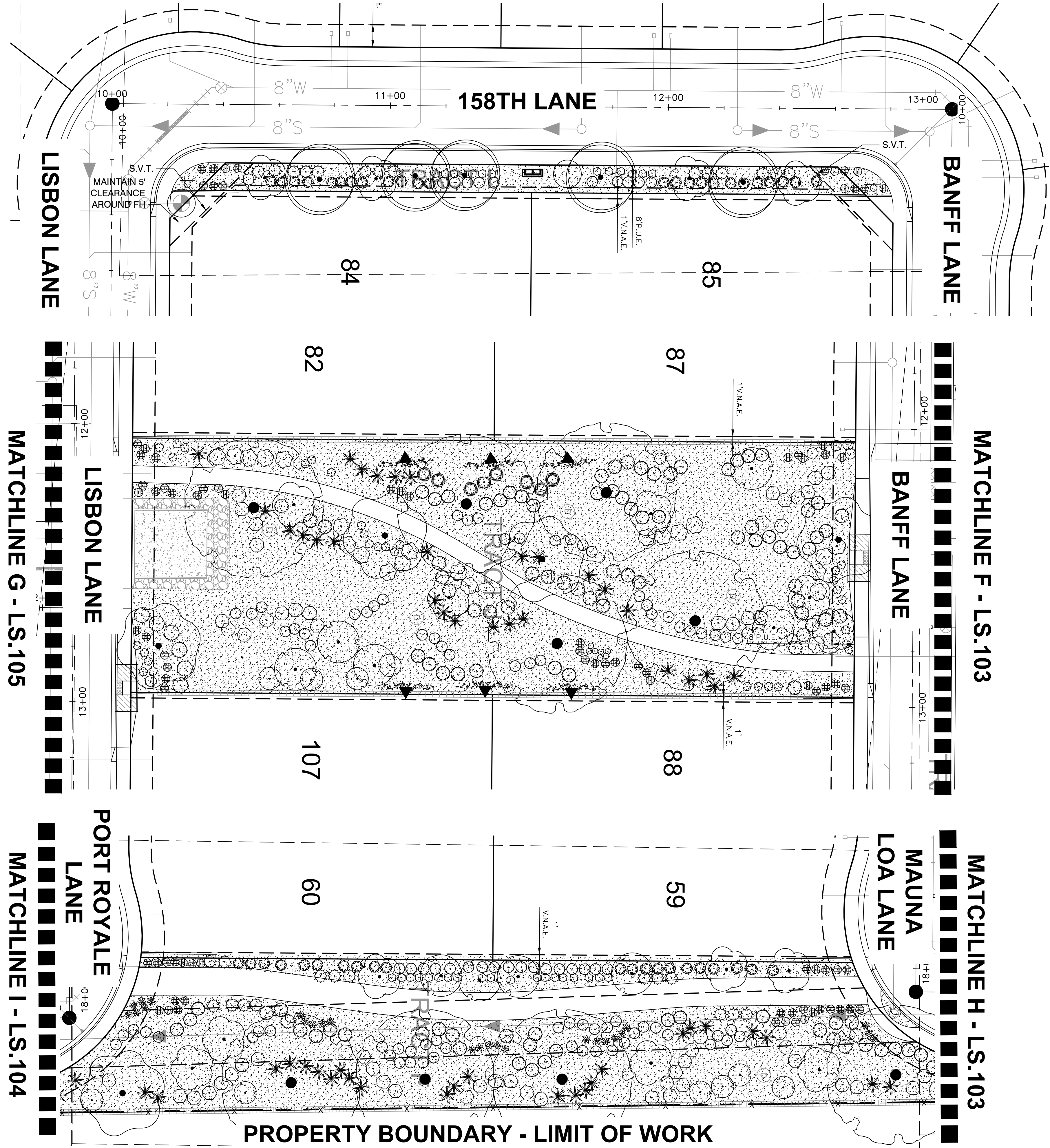
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PLANTING PLAN

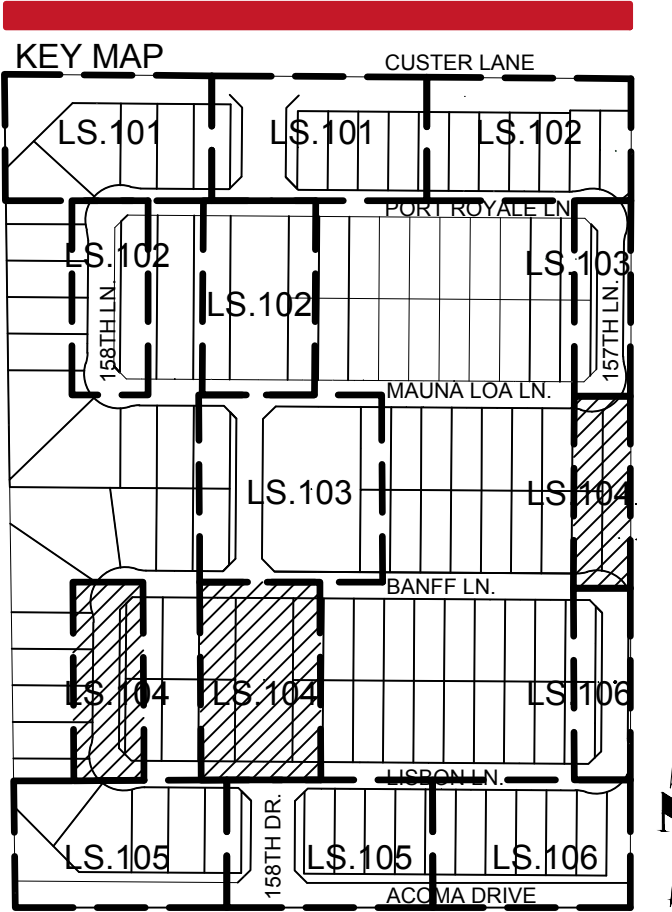
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FS16-321



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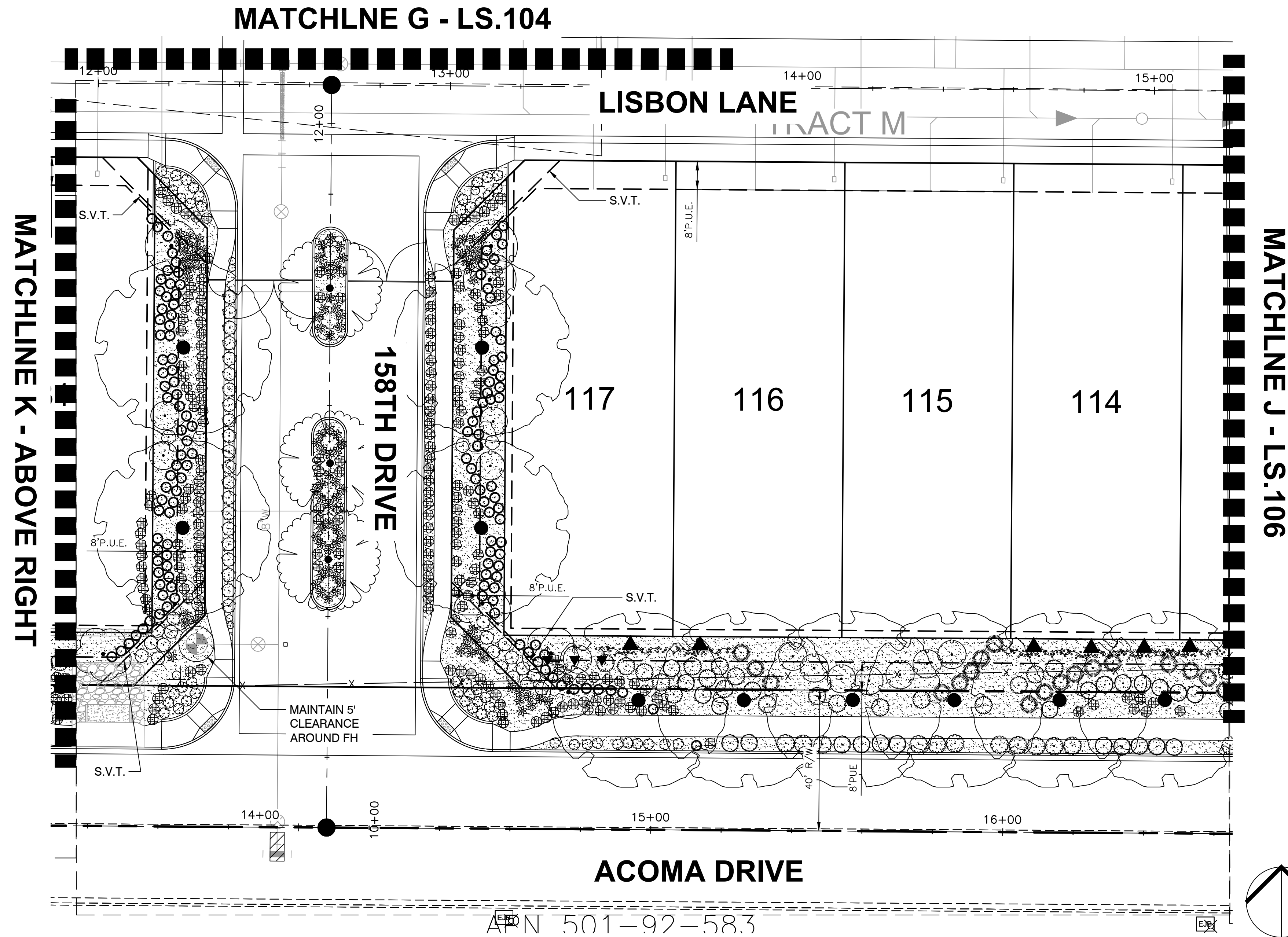
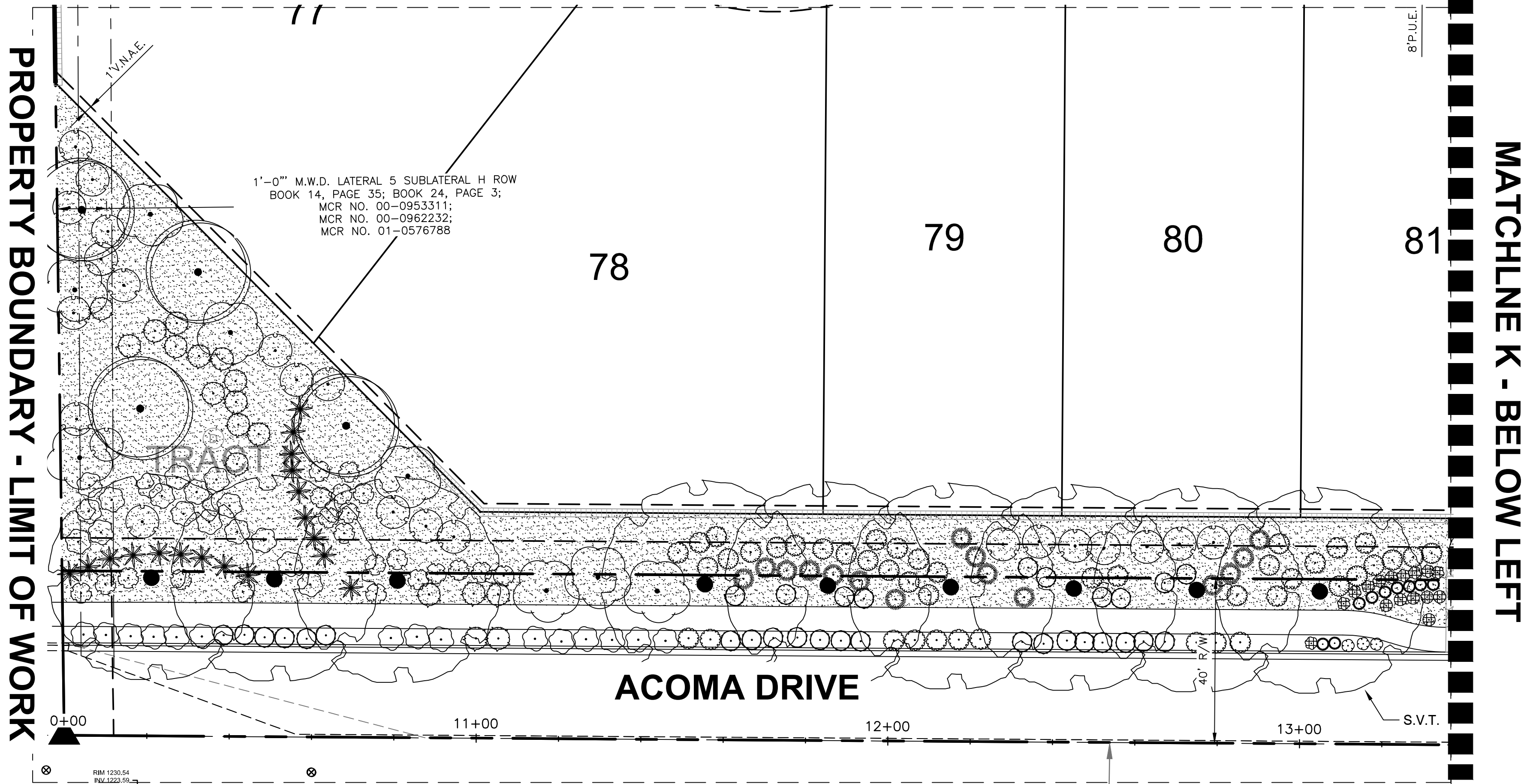
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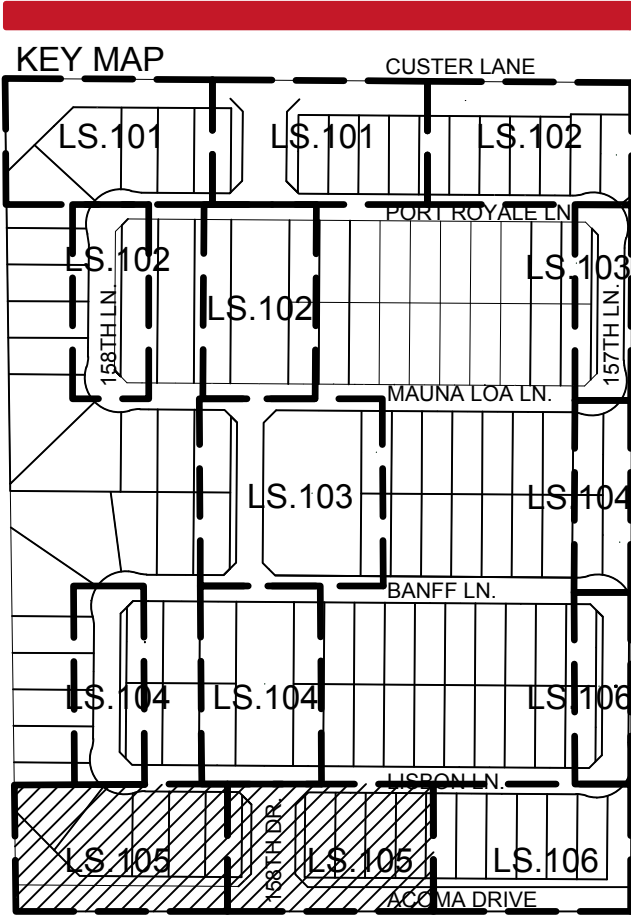
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FS16-321



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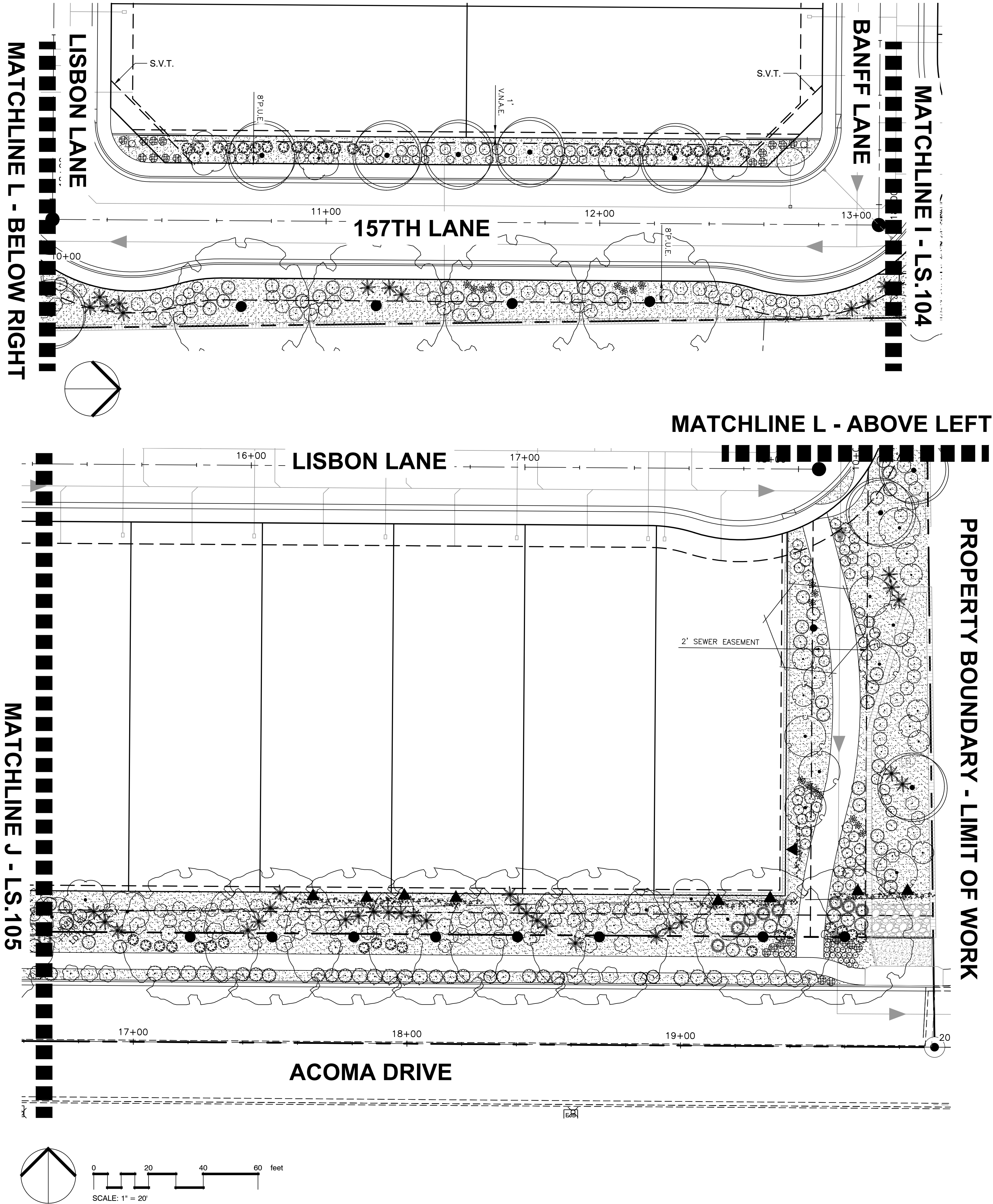
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ARIZONA, U.S.A.
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DISCIPLINE: LANDSCAPE ARCHITECTURE
PLANTING PLAN

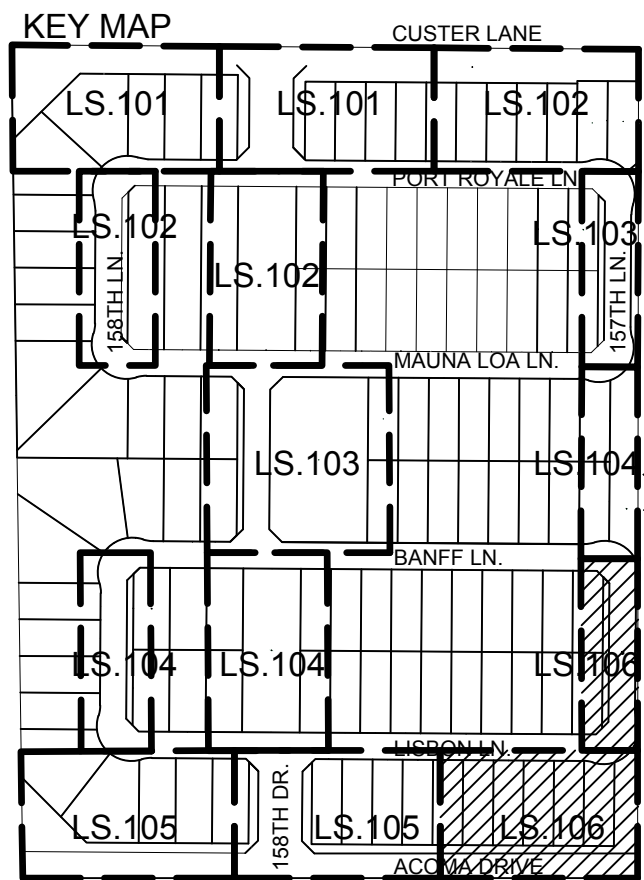
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FS16-321



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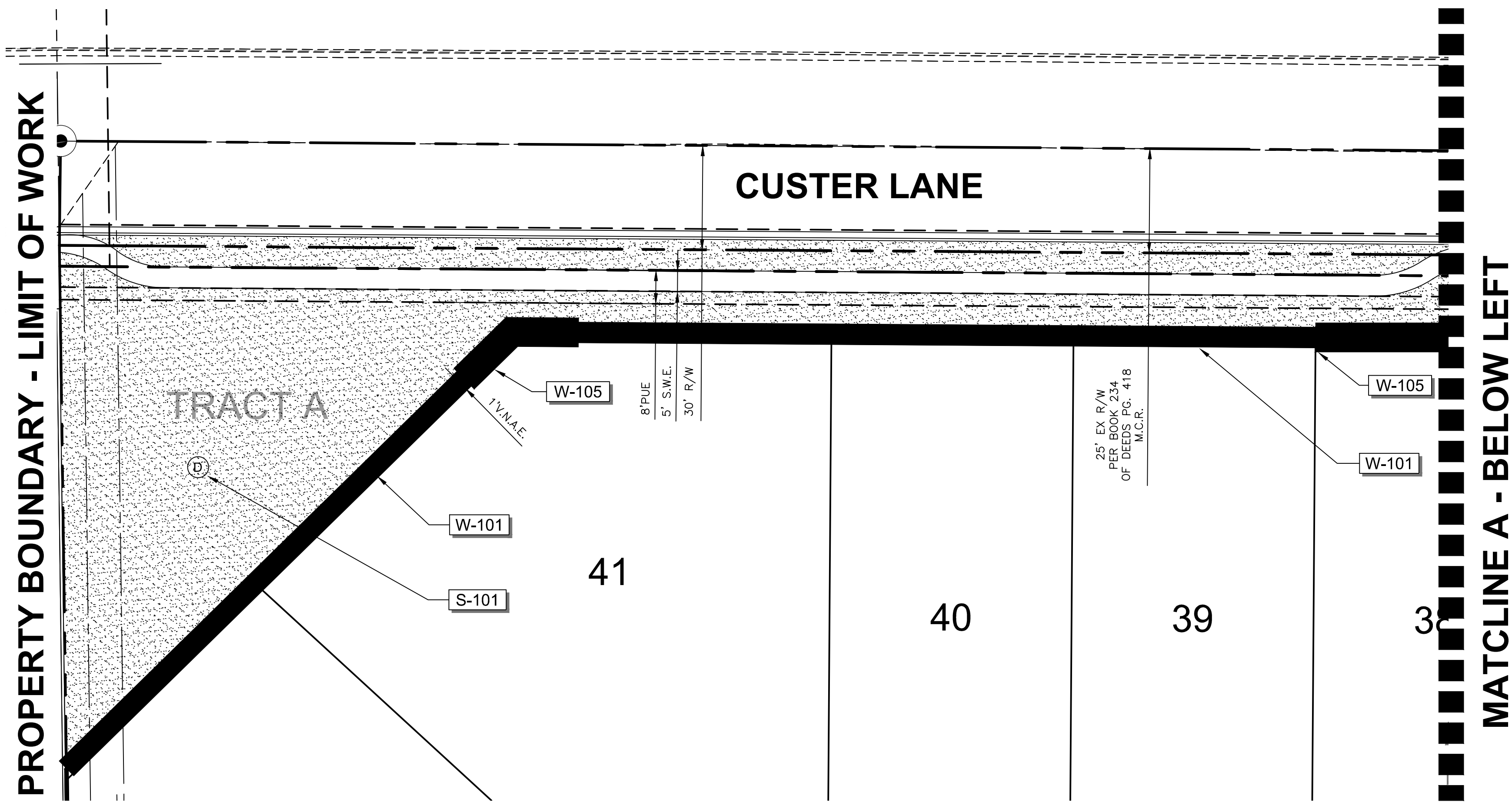
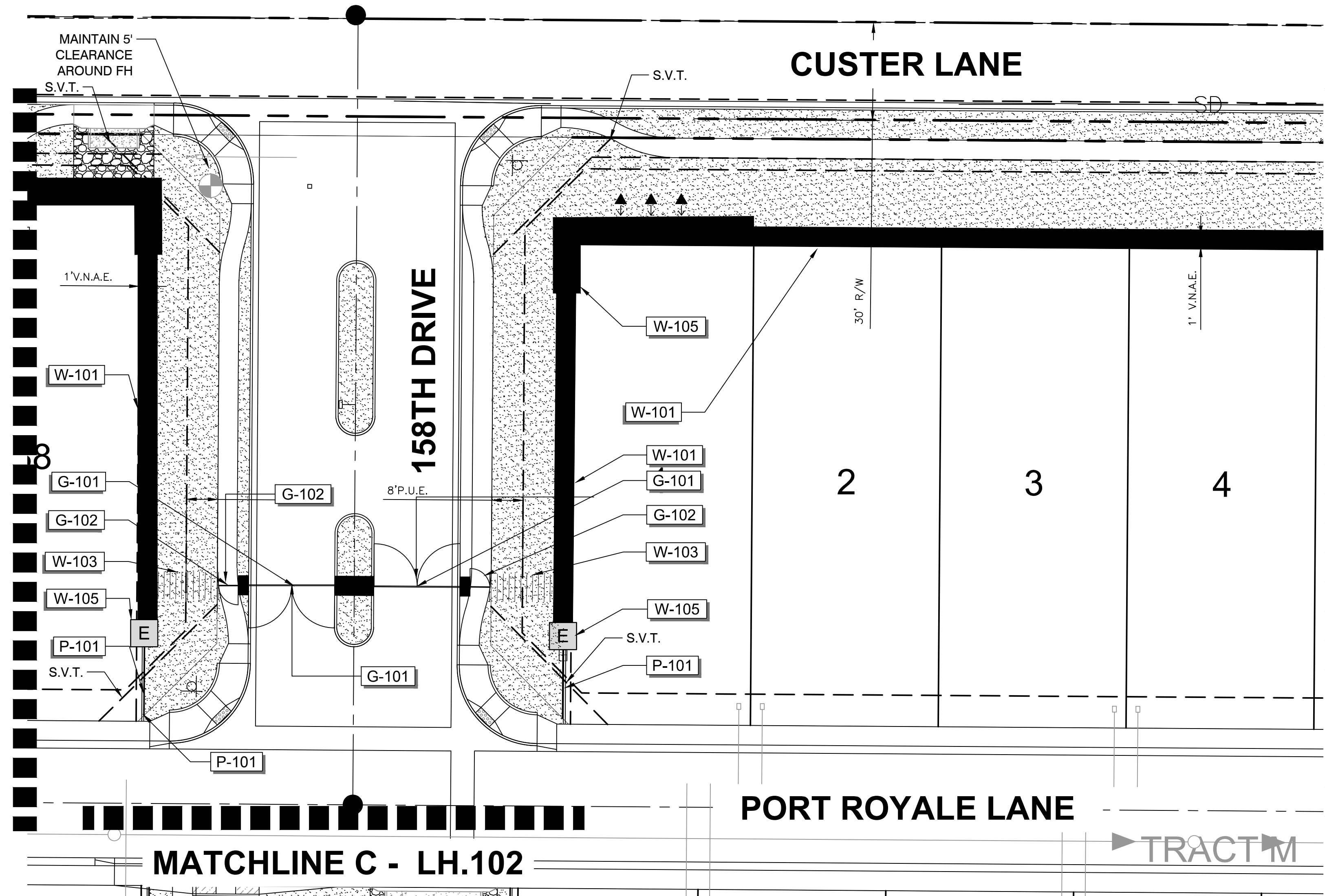
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SWETLAND
9/22/16
ARIZONA U.S.A.
EXPIRES 6-30-2016

DISCIPLINE: LANDSCAPE ARCHITECTURE
PLANTING PLAN

LP.106
8 of 28
FS16-321

MATCHLINE A - ABOVE RIGHT



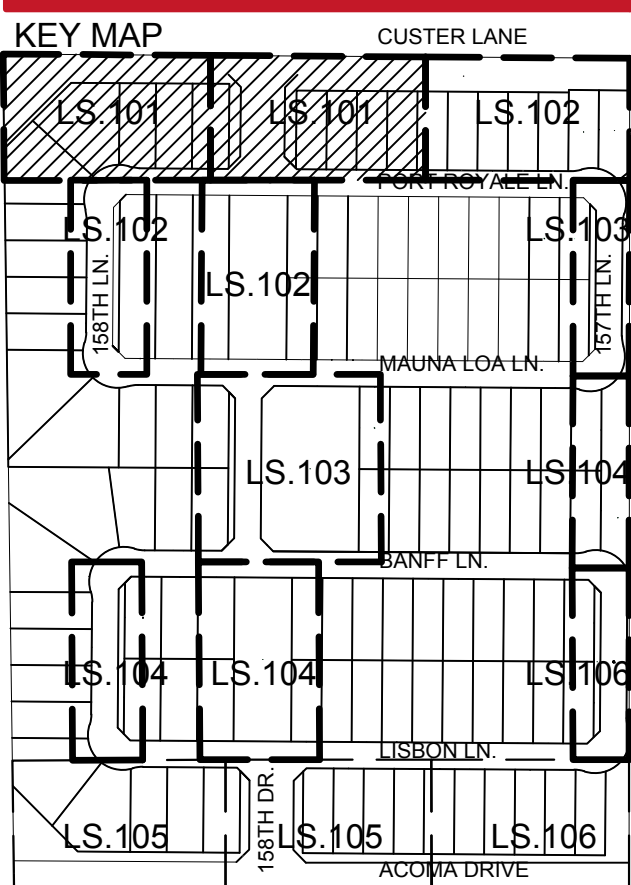
REFERENCE NOTES SCHEDULE

SYMBOL	GATES DESCRIPTION
G-101	VEHICULAR GATE
G-102	PEDESTRIAN GATE
SYMBOL	PAVING DESCRIPTION
P-101	6" CONCRETE HEADER
P-102	10" D.G. PATH
P-103	6" CONCRETE PATH
P-104	TOT LOT HEADER
SYMBOL	SITE IMPROVEMENTS DESCRIPTION
S-101	DRYWELL TYP. - REFER TO CIVIL PLANS
SYMBOL	SITE FURNISHINGS DESCRIPTION
SF-101	12" SQUARE DENVER RAMADA BY CLASSIC RECREATION SYSTEMS OR APPROVED EQUAL
SF-102	6" PRESTIGE BENCH MODEL #PP402R INGROUND MOUNT BY WABASH VALLEY OR APPROVED EQUAL. COLOR: DARK BRONZE
SF-103	TRASH RECEPTACLE MODEL # LR350P IN-GROUND MOUNT WITH FT105 TOP BY WABASH VALLEY OR APPROVED EQUAL. COLOR: DARK BRONZE
SF-104	6" SIGNATURE PICNIC TABLE MODEL #SG106P BY WABASH VALLEY. FRAME AND TOP COLOR: DARK BRONZE OR APPROVED EQUAL
SF-105	BBQ
SF-106	PLAY EQUIPMENT MODEL # 160791B BY LANDSCAPE STRUCTURES OR APPROVED EQUAL. COLOR: PALETTE H
SF-107	MAILBOX - APPROXIMATE LOCATION SHOWN ON PLAN. FINAL LOCATION TO BE DETERMINED BY THE U.S. POSTAL SERVICE
SYMBOL	WALL DESCRIPTION
W-101	6" THEME WALL
W-102	6" SECONDARY WALL
W-103	6" PARTIAL VIEW WALL
W-105	THEME PANEL
W-106	END OF WALL COLUMN

LIGHTING SCHEDULE

SYMBOL	MANUFACTURER/MODEL/DESCRIPTION	QTY	DETAIL
↓	FX LUMINAIRE NP - LED	6	

GROUND COVERS	QTY	COMMON NAME / BOTANICAL NAME
	1,439,356 SF	DECOMPOSED GRANITE / GRANITE DECOMPOSED 1/2" SCREENED, COLOR: MADISON GOLD
	1,346 SF	WOOD FIBER PLAY SURFACING / WOOD FIBER NATURAL



REVISION HISTORY

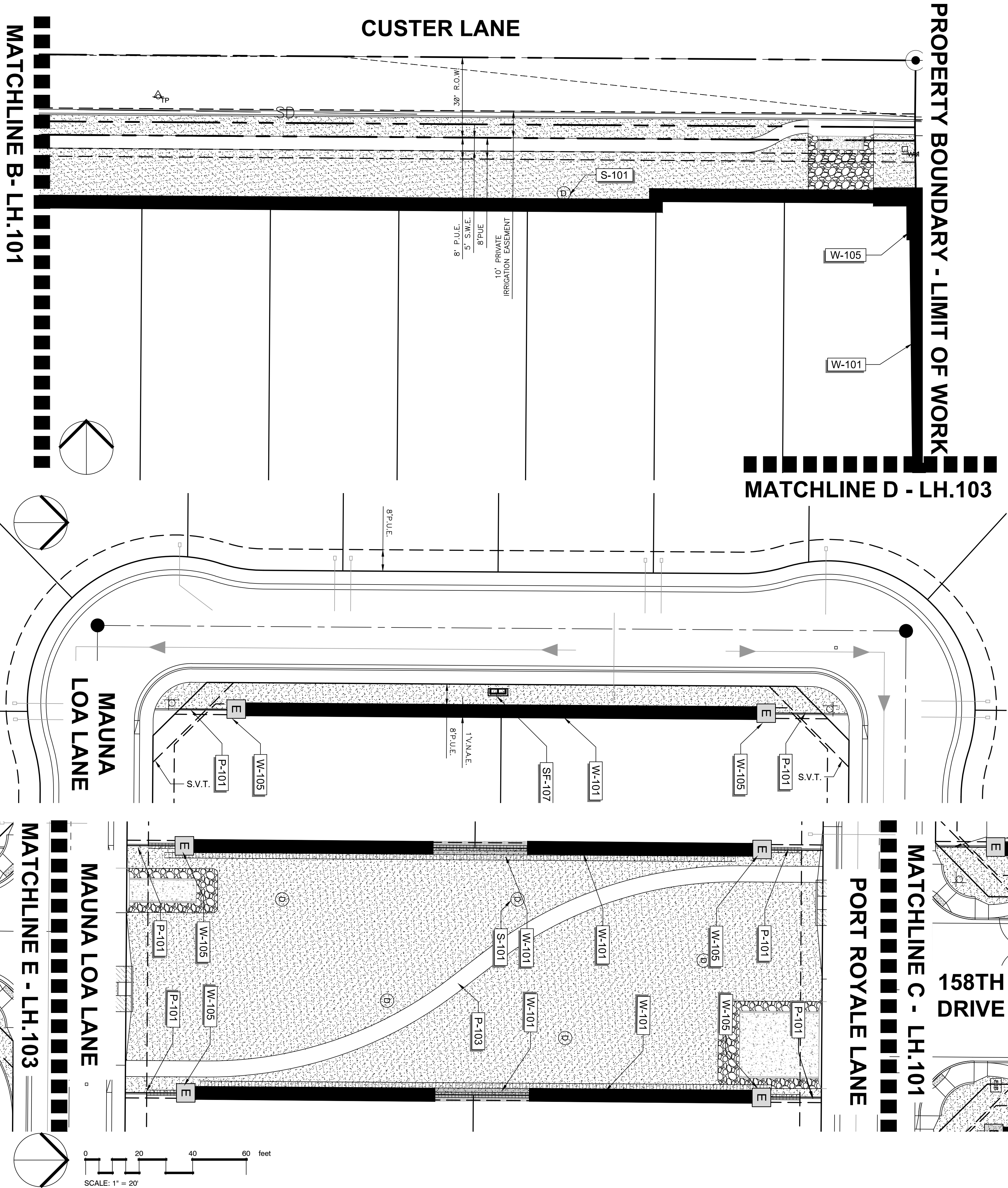
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DISCIPLINE: LANDSCAPE ARCHITECTURE
HARDSCAPE PLAN

LH.101
20 of 28
FS16-321



REFERENCE NOTES SCHEDULE

SYMBOL	GATES DESCRIPTION
G-101	VEHICULAR GATE
G-102	PEDESTRIAN GATE
SYMBOL	PAVING DESCRIPTION
P-101	6" CONCRETE HEADER
P-102	10" D.G. PATH
P-103	6" CONCRETE PATH
P-104	TOT LOT HEADER
SYMBOL	SITE IMPROVEMENTS DESCRIPTION
S-101	DRYWELL TYP. - REFER TO CIVIL PLANS
SYMBOL	SITE FURNISHINGS DESCRIPTION
SF-101	12" SQUARE DENVER RAMADA BY CLASSIC RECREATION SYSTEMS OR APPROVED EQUAL
SF-102	6" PRESTIGE BENCH MODEL #PP402R INGROUND MOUNT BY WABASH VALLEY OR APPROVED EQUAL. COLOR: DARK BRONZE
SF-103	TRASH RECEPTACLE MODEL # LR350P IN-GROUND MOUNT WITH FT105 TOP BY WABASH VALLEY OR APPROVED EQUAL. COLOR: DARK BRONZE.
SF-104	6" SIGNATURE PICNIC TABLE MODEL #SG106P BY WABASH VALLEY. FRAME AND TOP COLOR: DARK BRONZE OR APPROVED EQUAL
SF-105	BBQ
SF-106	PLAY EQUIPMENT MODEL # 160791B BY LANDSCAPE STRUCTURES OR APPROVED EQUAL. COLOR: PALETTE H
SF-107	MAILBOX - APPROXIMATE LOCATION SHOWN ON PLAN, FINAL LOCATION TO BE DETERMINED BY THE U.S. POSTAL SERVICE
SYMBOL	WALL DESCRIPTION
W-101	6" THEME WALL
W-102	6" SECONDARY WALL
W-103	6" PARTIAL VIEW WALL
W-105	THEME PANEL
W-106	END OF WALL COLUMN

LIGHTING SCHEDULE

SYMBOL	MANUFACTURER/MODEL/DESCRIPTION	QTY	DETAIL
▼	FX LUMINAIRE NP - LED	6	

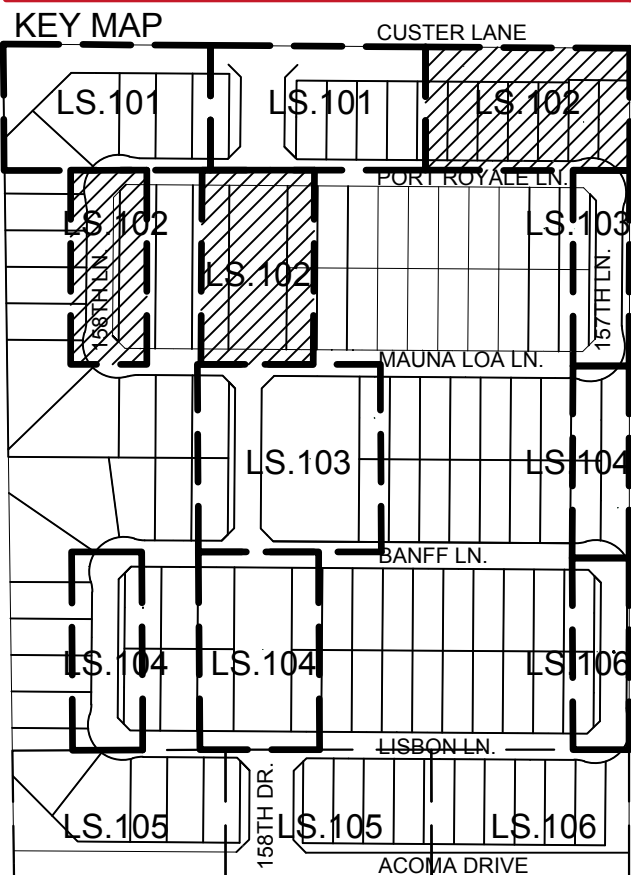
GROUND COVERS	QTY	COMMON NAME / BOTANICAL NAME
	1,539,555 SF	DECOMPOSED GRANITE / GRANITE DECOMPOSED 1/2" SCREENED, COLOR: MADISON GOLD
	1,346 SF	WOOD FIBER PLAY SURFACING / WOOD FIBER NATURAL

OWNER / DEVELOPER
GARRETT-WALKER HOMES, LLC
1838 WEST PARKSIDE LANE
SUITE 200
PHOENIX, ARIZONA 85027
CONTACT: RICK TAYRIEN
PHONE: (480) 607.6580
rtayrien@gwhaz.com

LANDSCAPE ARCHITECT
Project Manager:
COE & VAN LOO CONSULTANTS, INC.
4550 N. 12TH STREET
PHOENIX, AZ 85014
CONTACT: EARL SWETLAND
PHONE: 602.285.4786
EMAIL: ESWETLAND@CVLCI.COM

PROJECT INFORMATION
ACOMA COURT
WEST ACOMA DRIVE
SURPRISE, AZ 85379

CVL FILE NO.
01.0272201



REVISION HISTORY

SEAL & ISSUE

100%

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DRAWN: HP
CHECK: ES

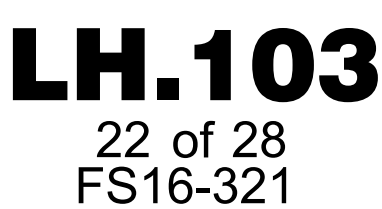
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HARDSCAPE PLAN

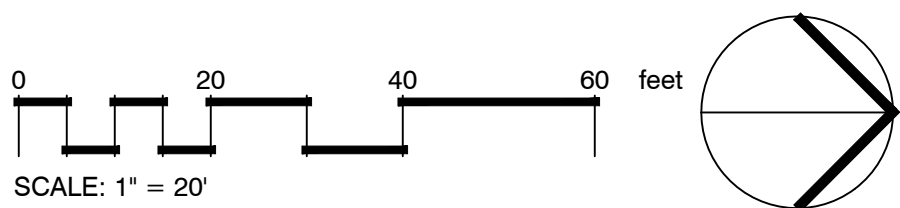
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21 of 28
FS16-321



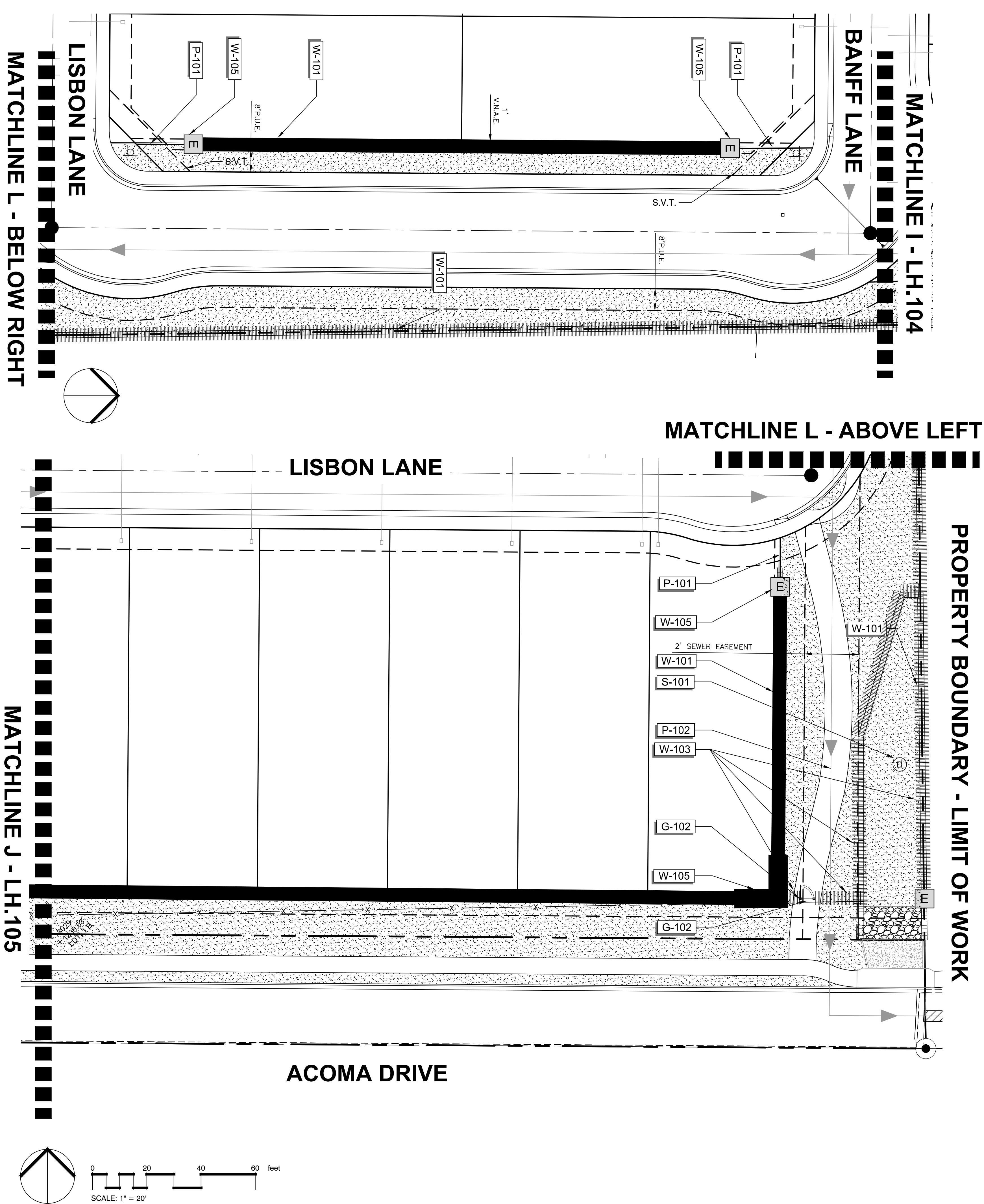
0 20 40 60 feet

SCALE: 1" = 20'





LH.104
23 of 28
FS16-321

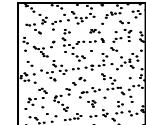
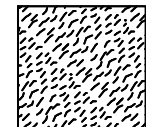


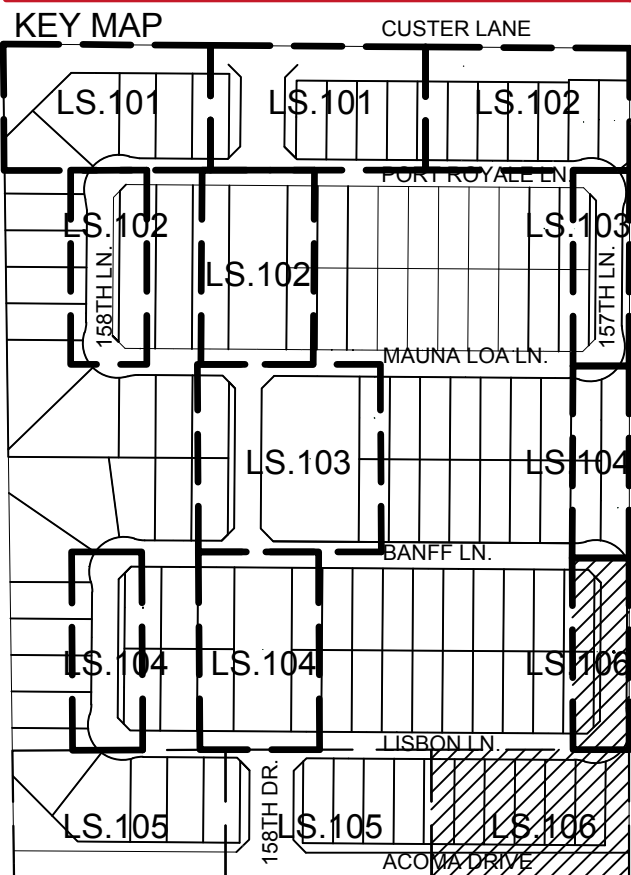
REFERENCE NOTES SCHEDULE

SYMBOL	GATES DESCRIPTION
G-101	VEHICULAR GATE
G-102	PEDESTRIAN GATE
SYMBOL	PAVING DESCRIPTION
P-101	6" CONCRETE HEADER
P-102	10" D.G. PATH
P-103	6" CONCRETE PATH
P-104	TOT LOT HEADER
SYMBOL	SITE IMPROVEMENTS DESCRIPTION
S-101	DRYWELL TYP. - REFER TO CIVIL PLANS
SYMBOL	SITE FURNISHINGS DESCRIPTION
SF-101	12" SQUARE DENVER RAMADA BY CLASSIC RECREATION SYSTEMS OR APPROVED EQUAL
SF-102	6" PRESTIGE BENCH MODEL #PP402R INGROUND MOUNT BY WABASH VALLEY OR APPROVED EQUAL. COLOR: DARK BRONZE
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SF-106	PLAY EQUIPMENT MODEL # 160791B BY LANDSCAPE STRUCTURES OR APPROVED EQUAL. COLOR PALETTE H
SF-107	MAILBOX - APPROXIMATE LOCATION SHOWN ON PLAN, FINAL LOCATION TO BE DETERMINED BY THE U.S. POSTAL SERVICE
SYMBOL	WALL DESCRIPTION
W-101	6" THEME WALL
W-102	6" SECONDARY WALL
W-103	6" PARTIAL VIEW WALL
W-105	THEME PANEL
W-106	END OF WALL COLUMN

LIGHTING SCHEDULE

SYMBOL	MANUFACTURER/MODEL/DESCRIPTION	QTY	DETAIL
▼	FX LUMINAIRE NP - LED	6	

GROUND COVERS	QTY	COMMON NAME / BOTANICAL NAME
	1,586 SF	DECOMPOSED GRANITE / GRANITE DECOMPOSED 1/2" SCREENED, COLOR: MADISON GOLD
	1,346 SF	WOOD FIBER PLAY SURFACING / WOOD FIBER NATURAL

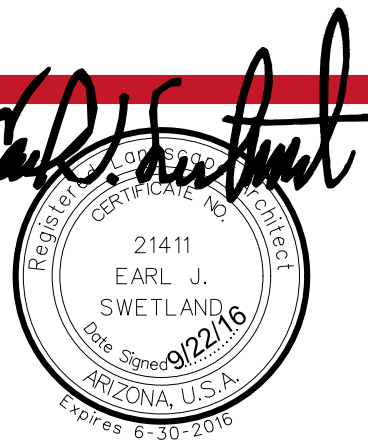


REVISION HISTORY

SEAL & ISSUE

100%

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DRAWN: HP
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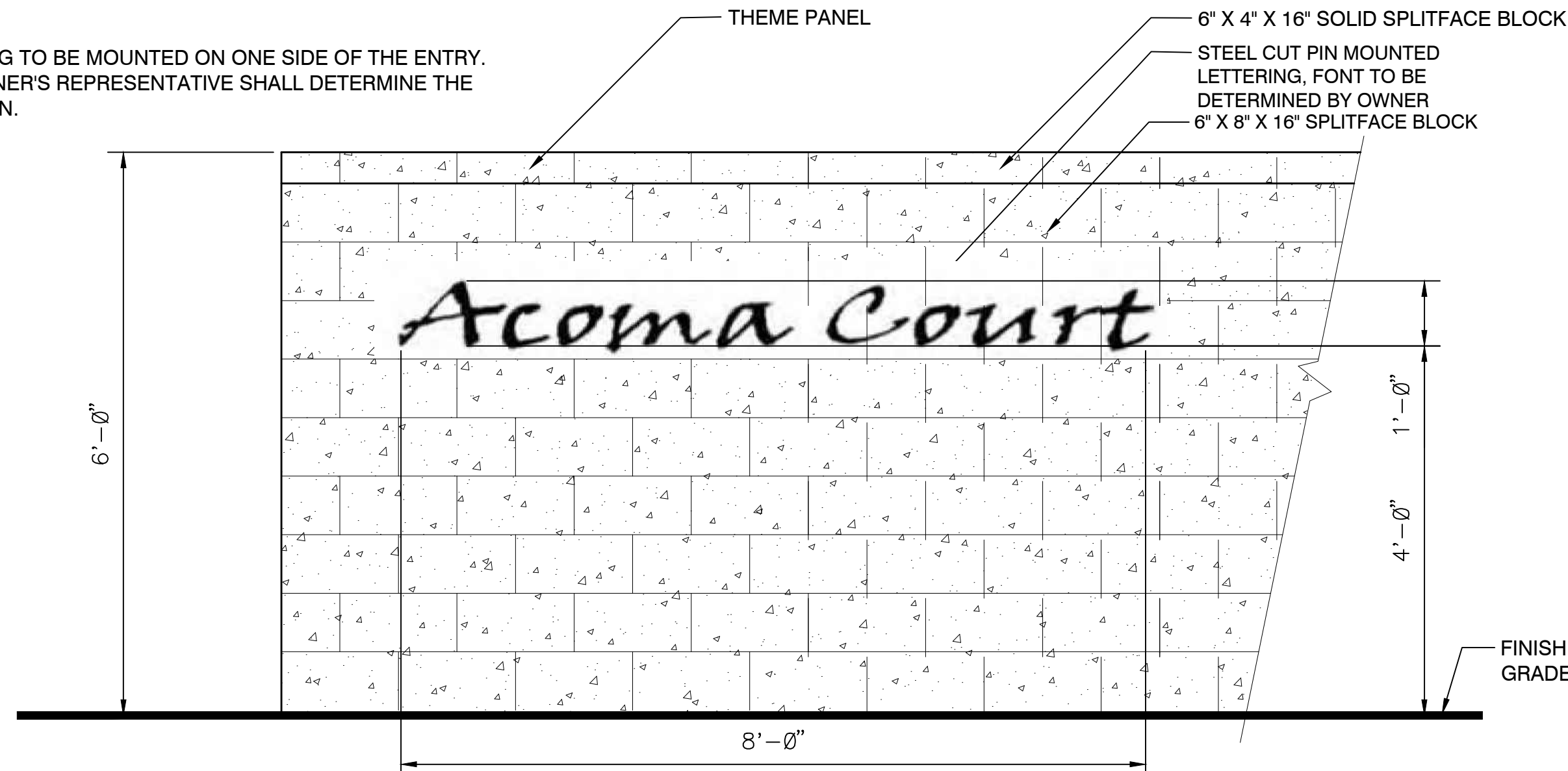


DISCIPLINE: LANDSCAPE ARCHITECTURE
HARDSCAPE PLAN

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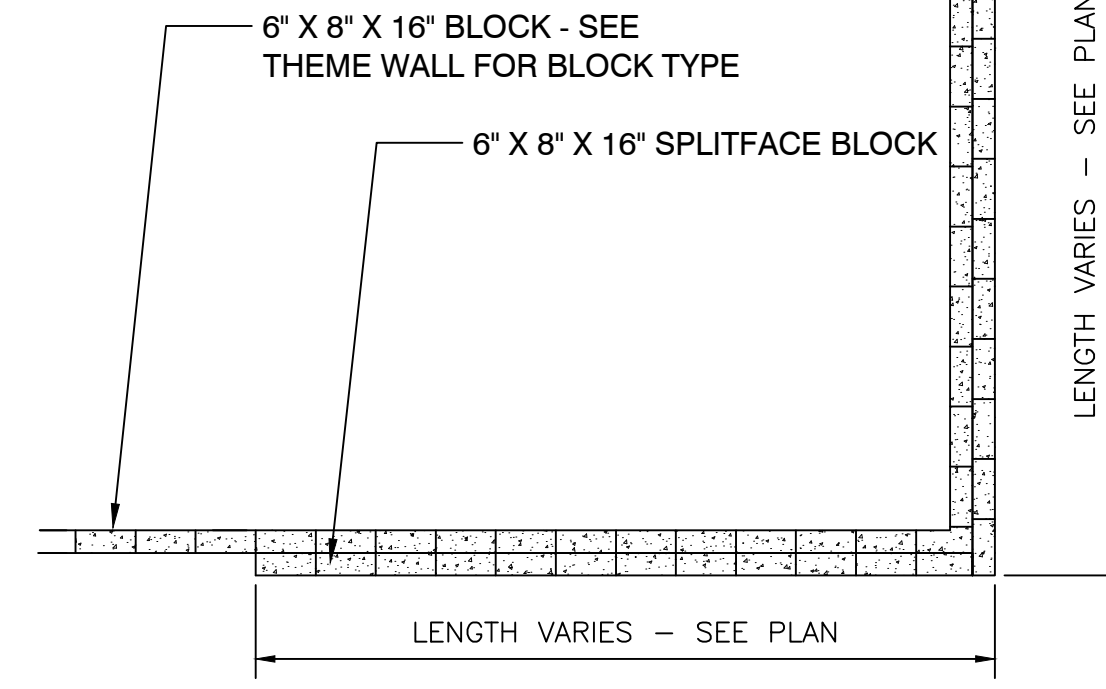
NOTE:
1. LETTERING TO BE MOUNTED ON ONE SIDE OF THE ENTRY.
THE OWNER'S REPRESENTATIVE SHALL DETERMINE THE
LOCATION.



1 ENTRY MONUMENT - ELEVATION

3/4" = 1'-0"

M-CI3-39



2 THEME PANEL - PLAN VIEW

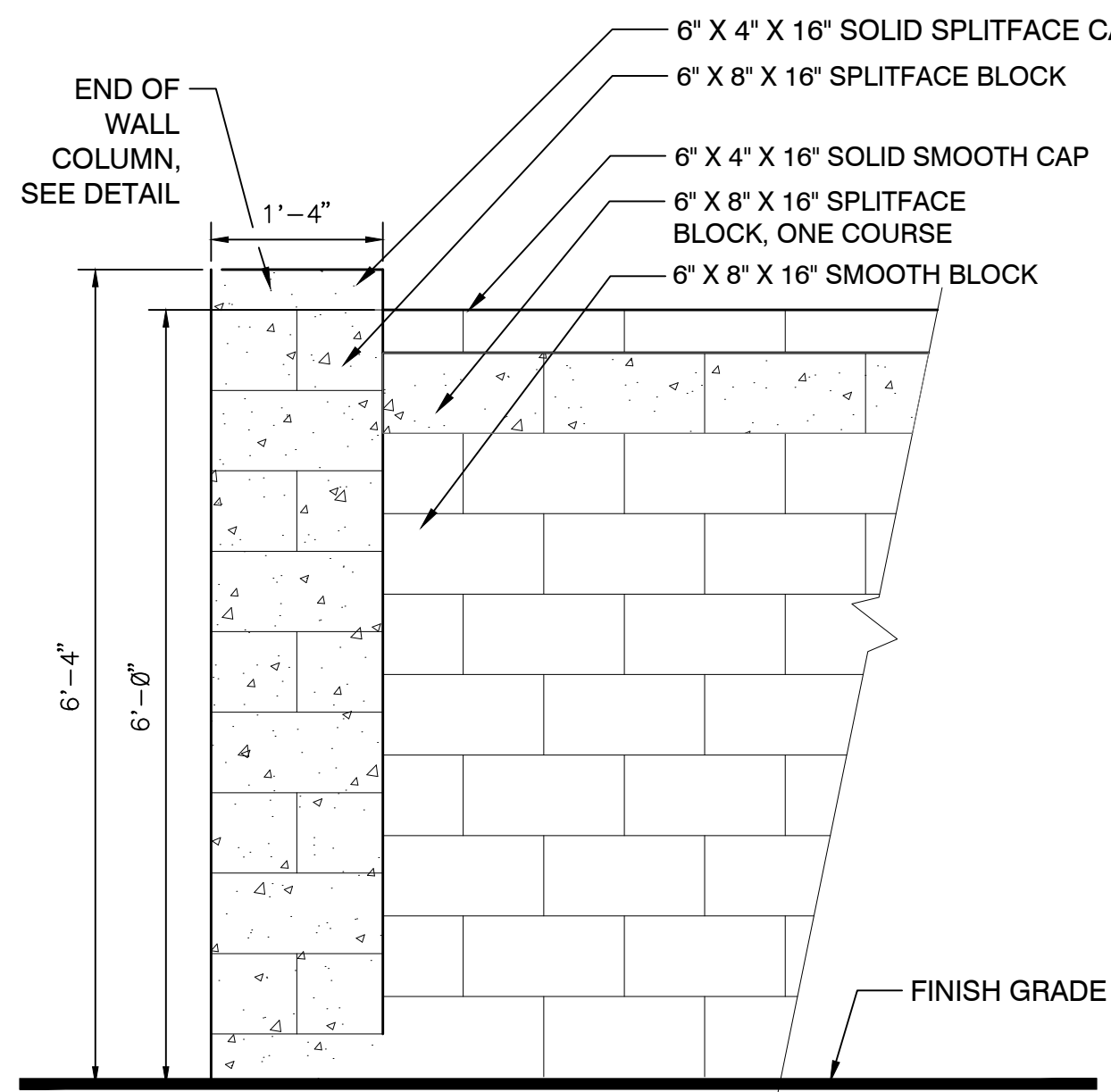
1/4" = 1'-0"

M-CI3-25

3 6' THEME WALL - ELEVATION

3/4" = 1'-0"

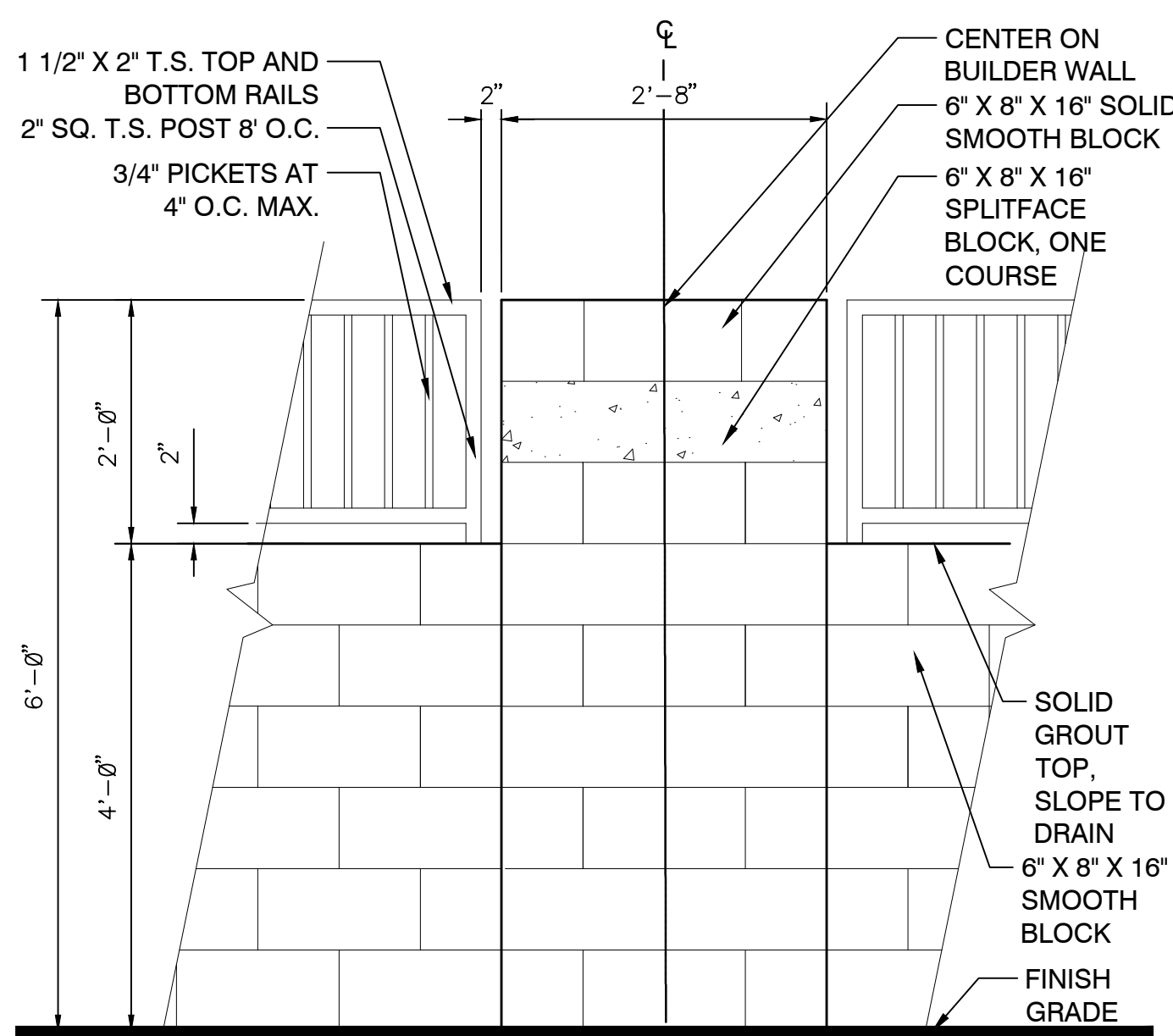
M-CI3-15



4 6' SECONDARY WALL - ELEVATION

3/4" = 1'-0"

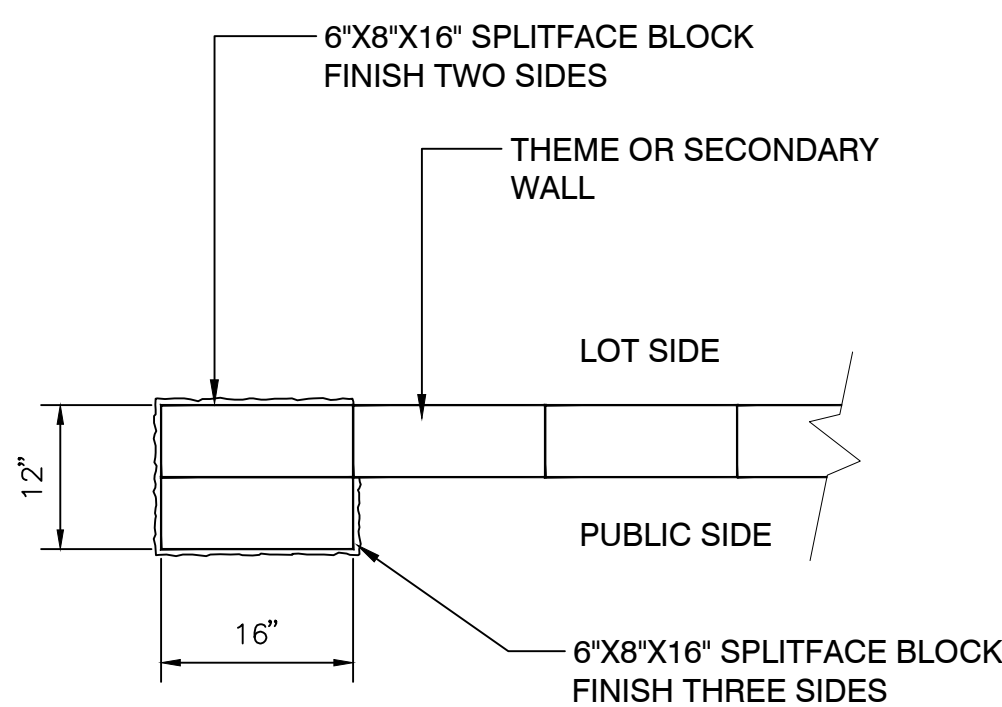
M-CI3-16



5 6' PARTIAL VIEW WALL - ELEVATION

3/4" = 1'-0"

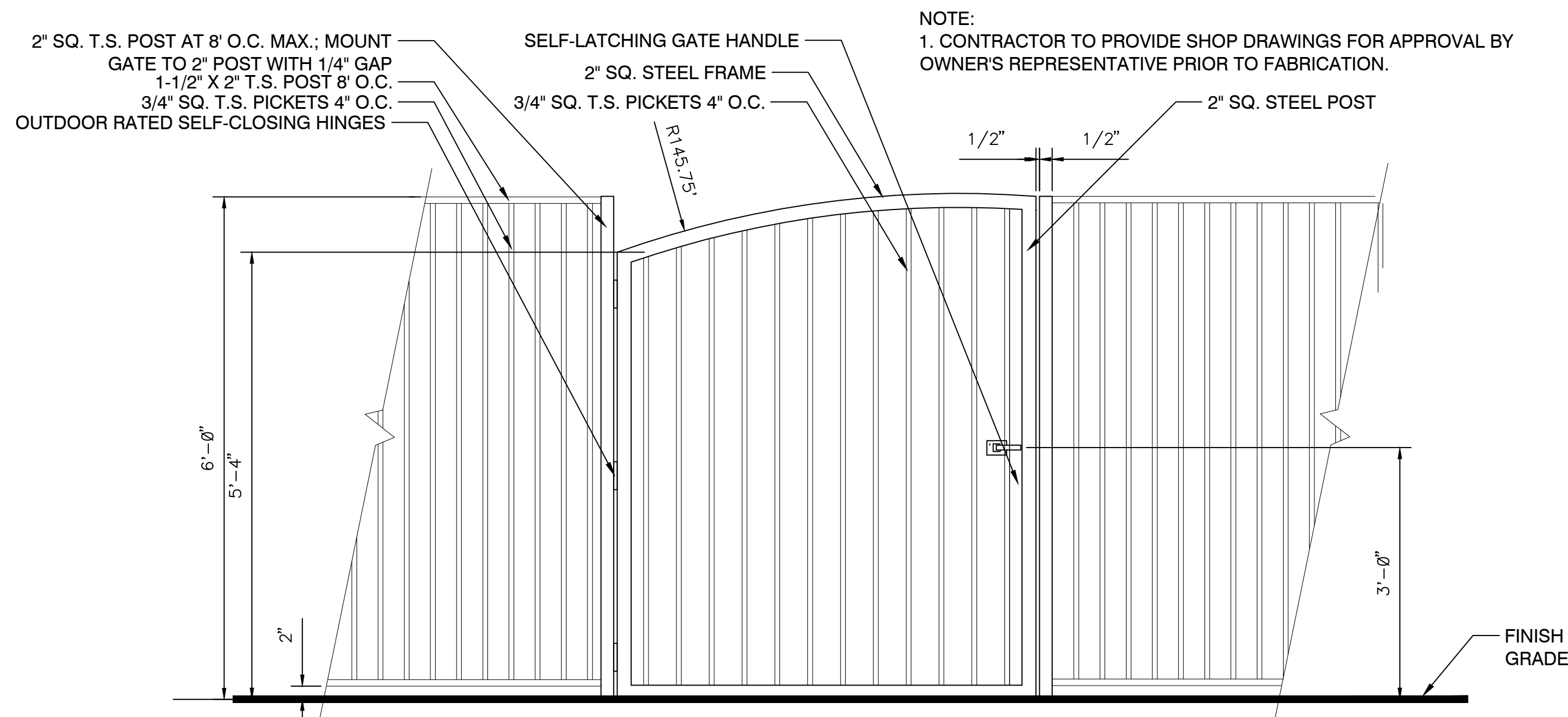
M-CI3-17



7 END OF WALL COLUMN - PLAN VIEW

3/4" = 1'-0"

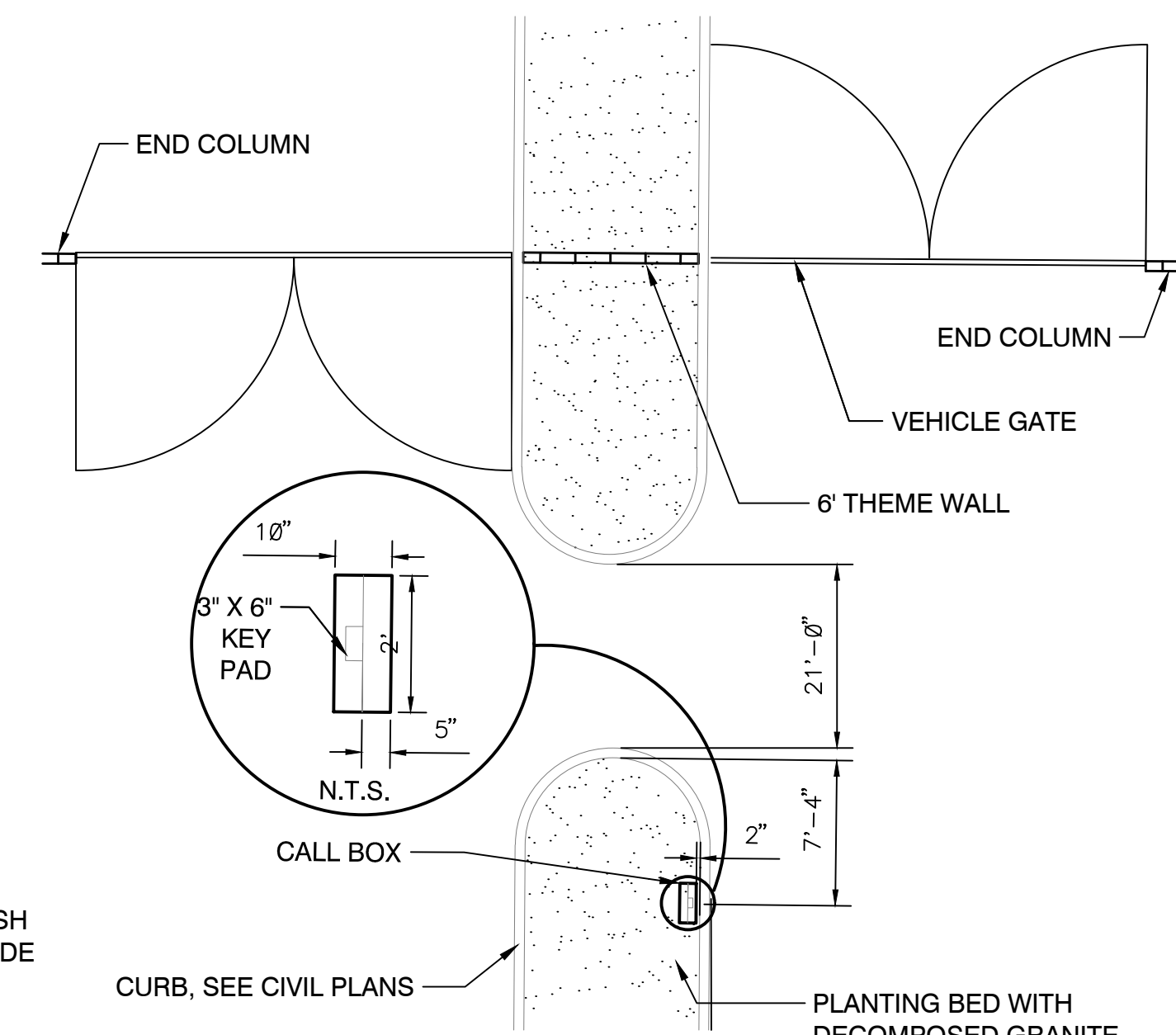
M-CI3-21



8 PEDESTRIAN GATE IN FULL VIEW FENCE - ELEVATION

3/4" = 1'-0"

M-CI3-19



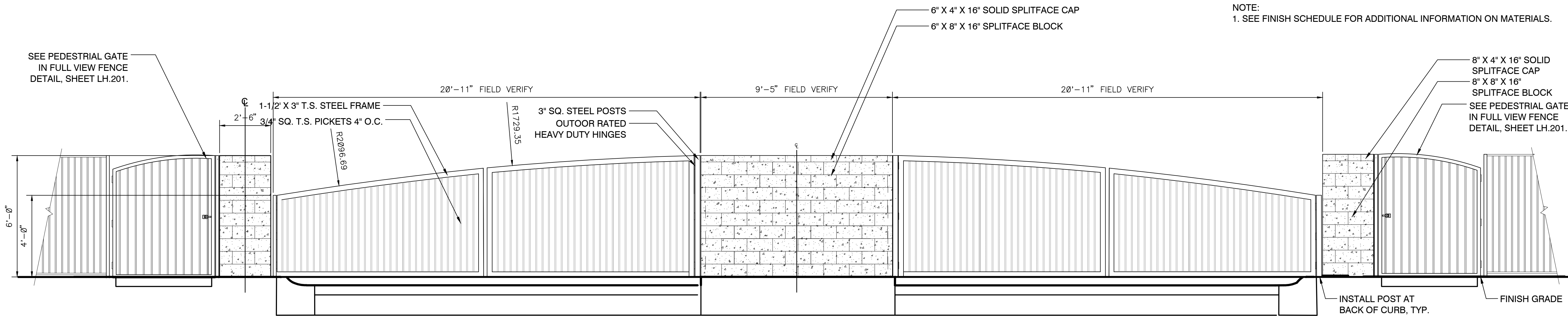
9 CALL BOX - PLAN VIEW

1/8" = 1'-0"

M-CI3-30

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PRINTER INFORMATION:
SHEET SET INFORMATION:

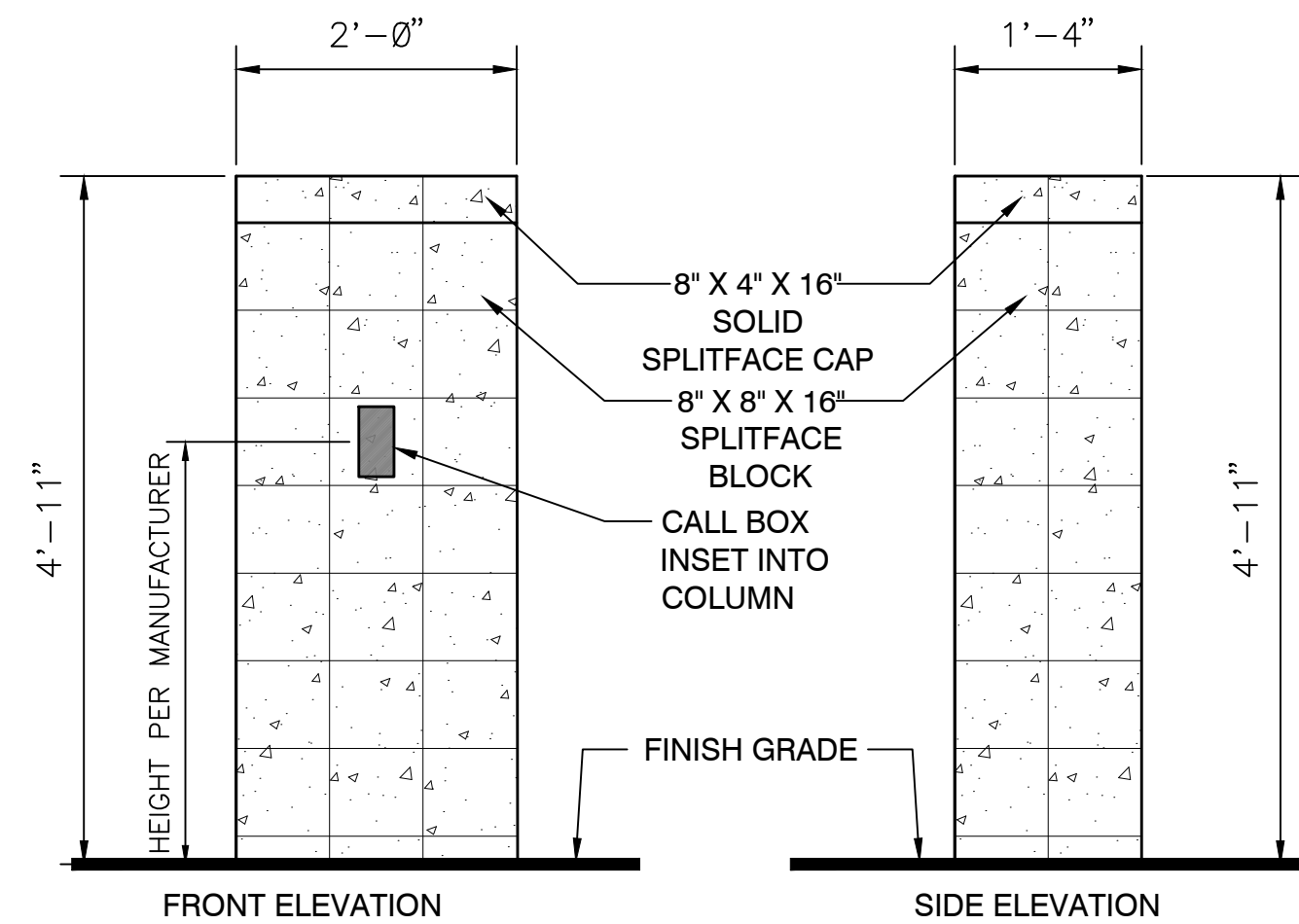


NOTE:
1. SEE FINISH SCHEDULE FOR ADDITIONAL INFORMATION ON MATERIALS.

GATED ENTRANCE - ELEVATION

3/8" = 1'-0"

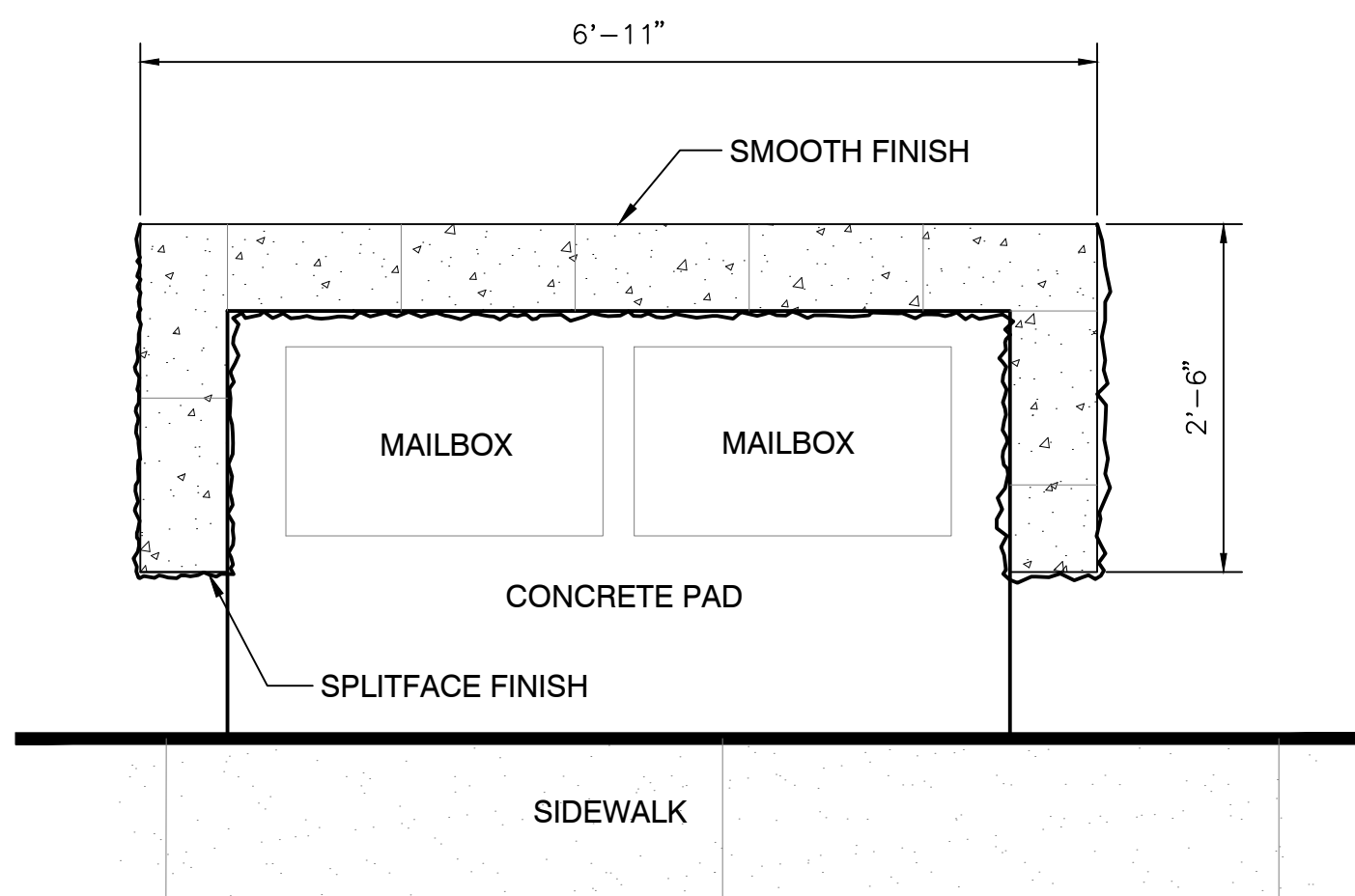
M-CI3-20



CALL BOX

3/4" = 1'-0"

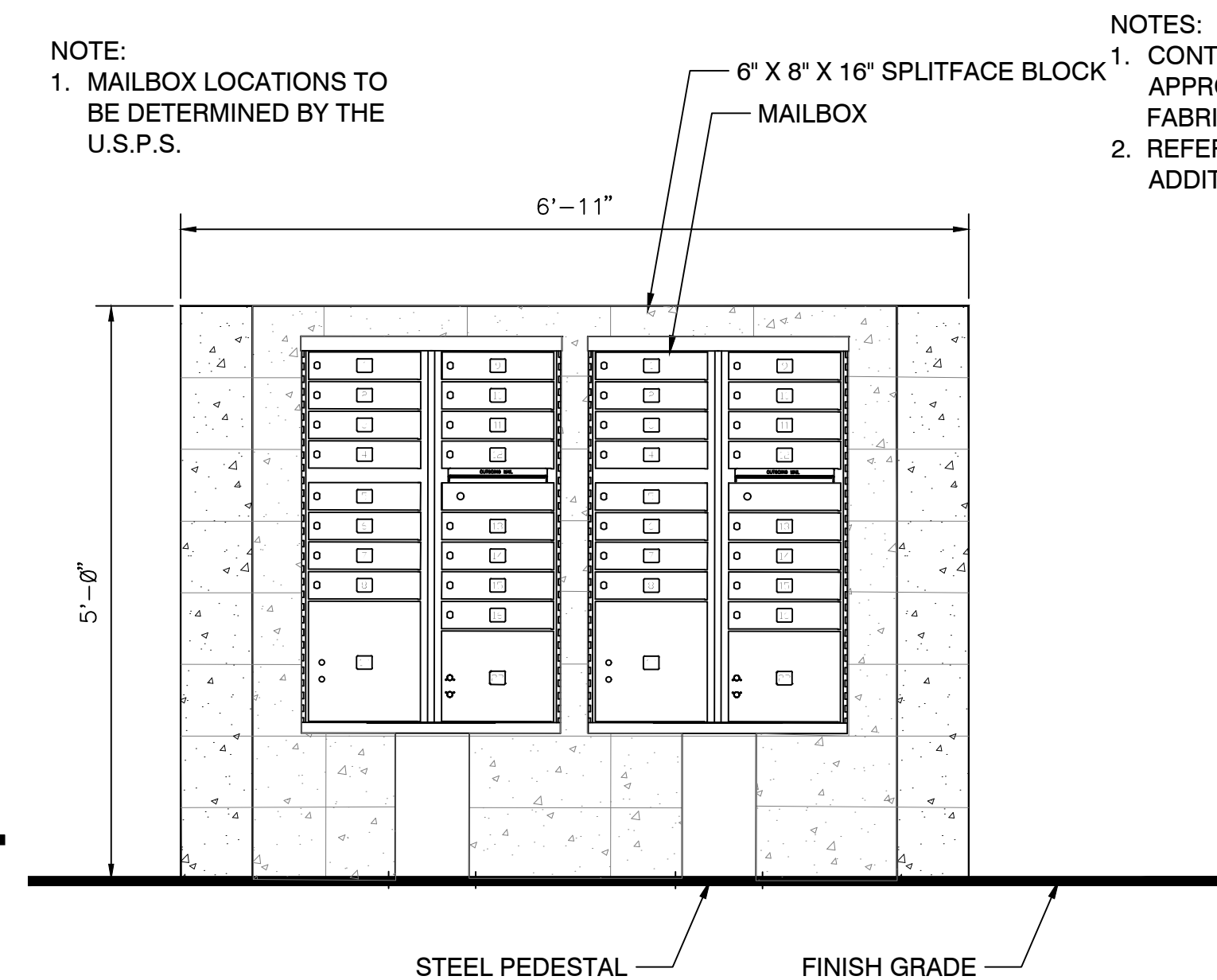
M-CI3-37



MAILBOX LAYOUT - PLAN VIEW

3/4" = 1'-0"

M-CI3-22

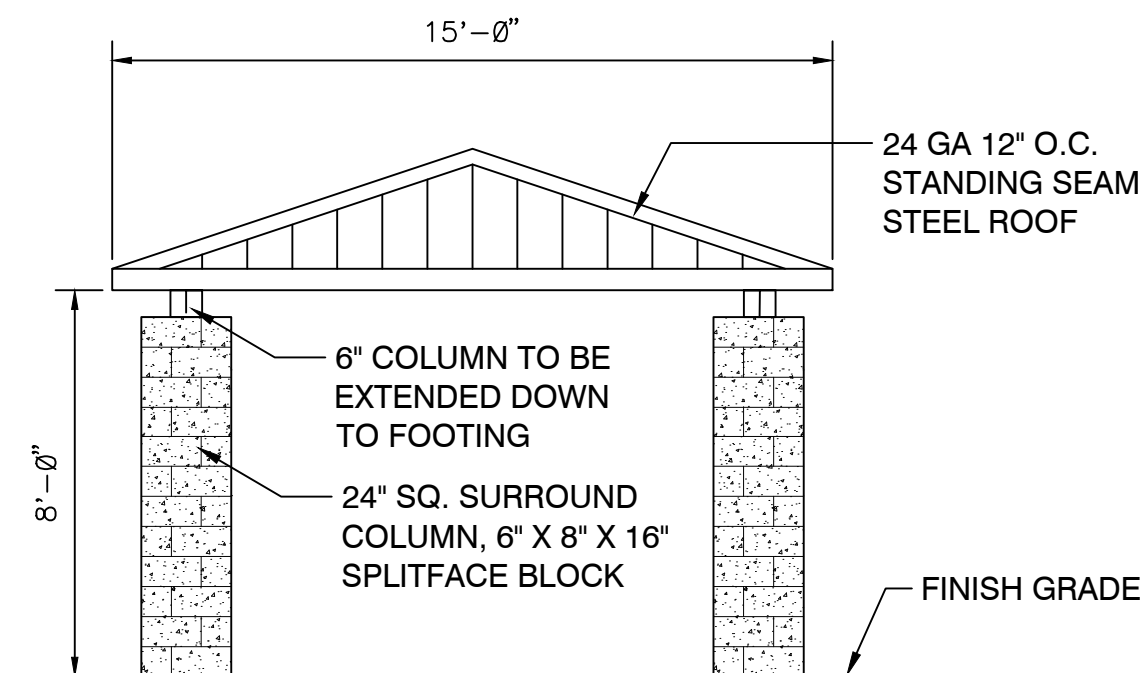


MAILBOX - ELEVATION

3/4" = 1'-0"

M-CI3-23

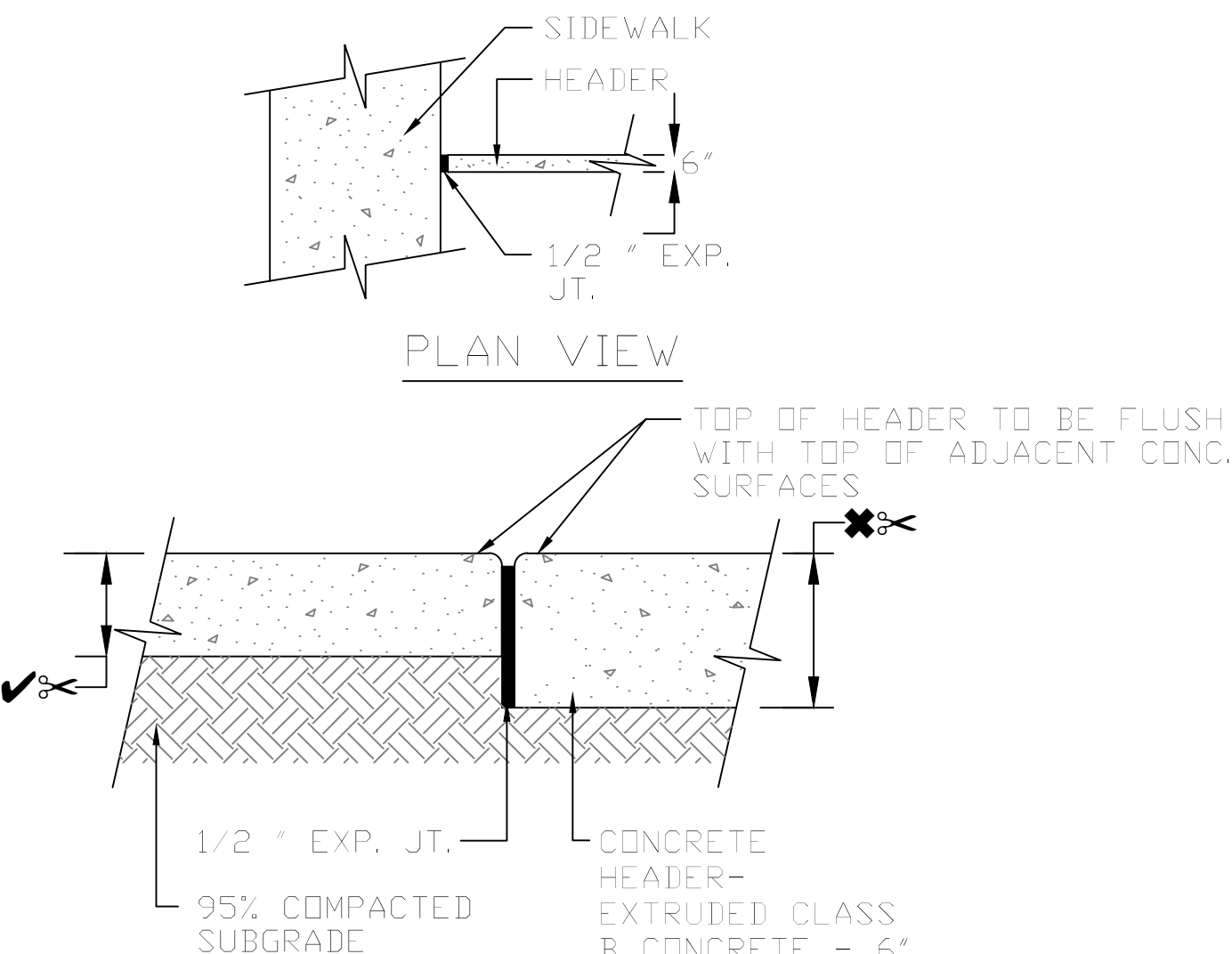
NOTES:
1. CONTRACTOR TO PROVIDE SHOP DRAWINGS FOR APPROVAL BY OWNER'S REPRESENTATIVE PRIOR TO FABRICATION.
2. REFER TO MATERIALS AND FINISHES SCHEDULE FOR ADDITIONAL INFORMATION.



16' X 16' DENVER RAMADA

1/4" = 1'-0"

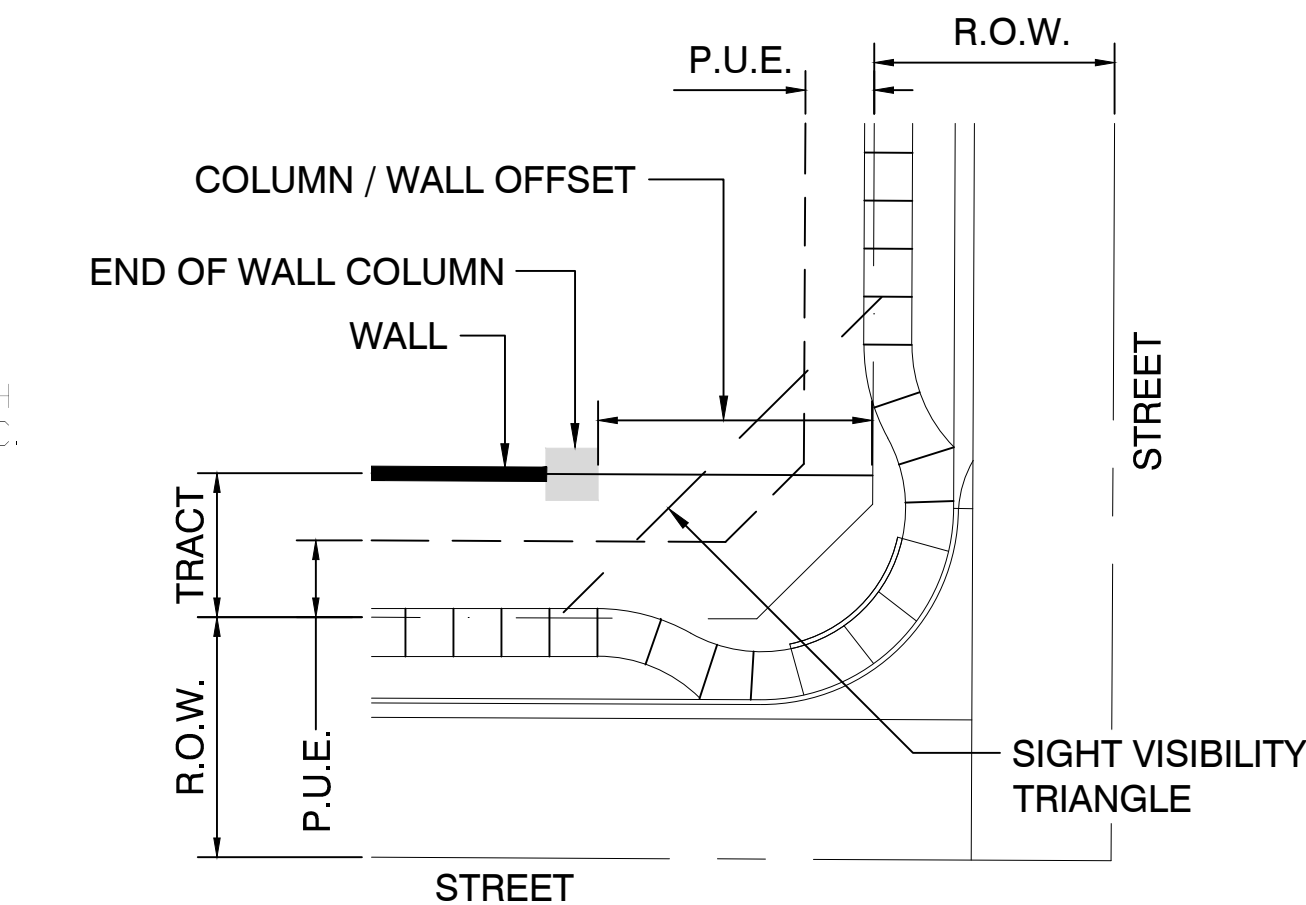
M-CI3-26



COCONRETE HEADER

1" = 1'

M-CI3-40

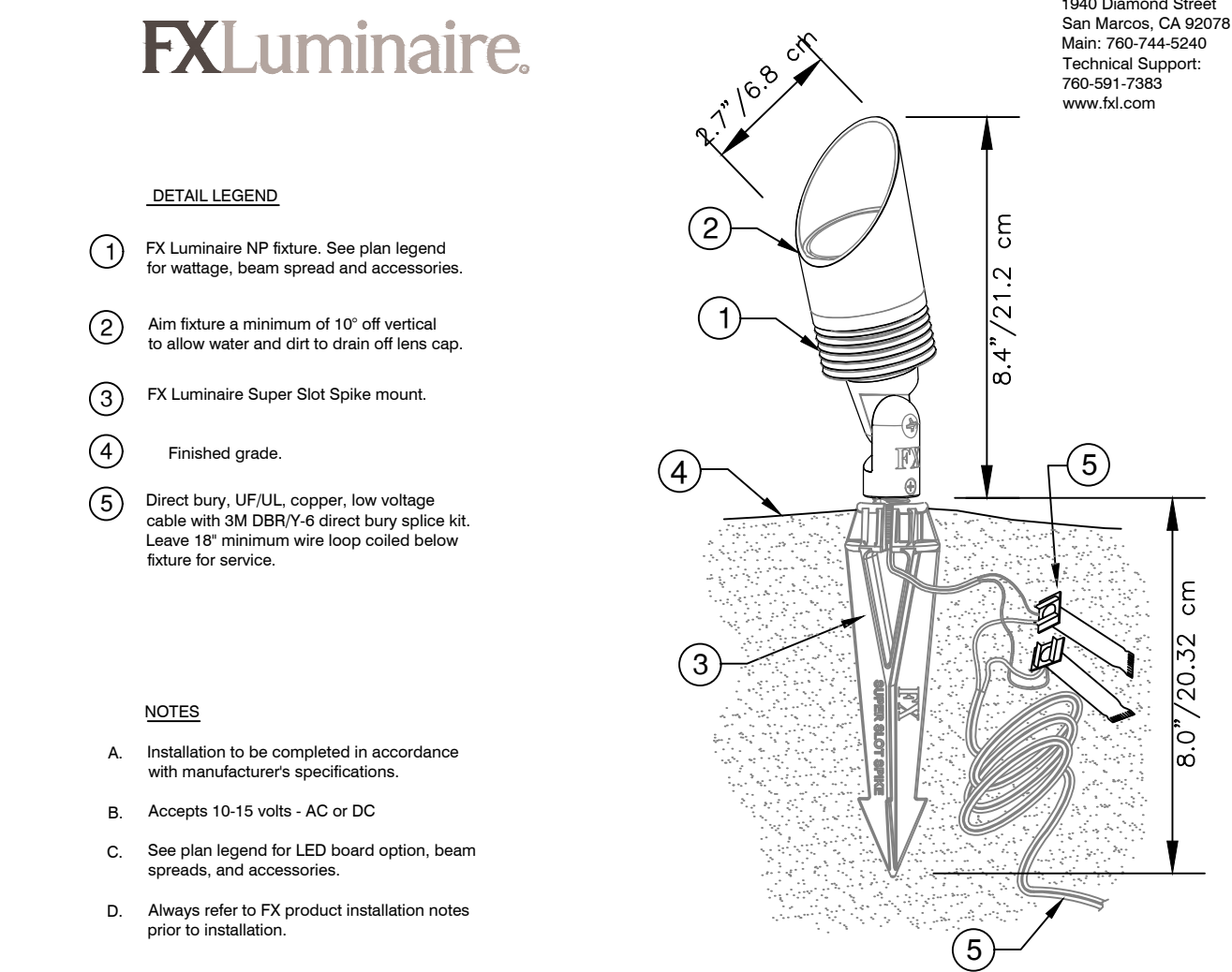


WALL / COLUMN LAYOUT NOTES:
1. COLUMN AND WALL OFFSET FROM BACK OF R.O.W. SHALL BE DETERMINED BY CLIENT.
2. ALL COLUMNS AND WALLS SHALL NOT ENCR OACH IN TO THE SIGHT VISIBILITY TRIANGLE.

WALL / COLUMN LAYOUT DETAIL

1" = 20'

M-CI3-43



NP UP LIGHT SUPER SLOT SPIKE

NOT TO SCALE

M-CI3-65

OWNER / DEVELOPER
GARRETT-WALKER HOMES, LLC
1838 WEST PARKSIDE LANE
SUITE 200
PHOENIX, ARIZONA 85027
CONTACT: RICK TAYRIEN
PHONE: (480) 607.6580
rtayrien@gwhaz.com

LANDSCAPE ARCHITECT
Project Manager:
COE & VAN LOO CONSULTANTS, INC.
4550 N. 12TH STREET
PHOENIX, AZ 85014
CONTACT: EARL SWETLAND
PHONE: 602.285.4786
EMAIL: ESWETLAND@CVL.CI.COM

PROJECT INFORMATION
ACOMA COURT
WEST ACOMA DRIVE
SURPRISE, AZ 85379

CVL FILE NO.
01.0272201

REVISION HISTORY

SEAL & ISSUE

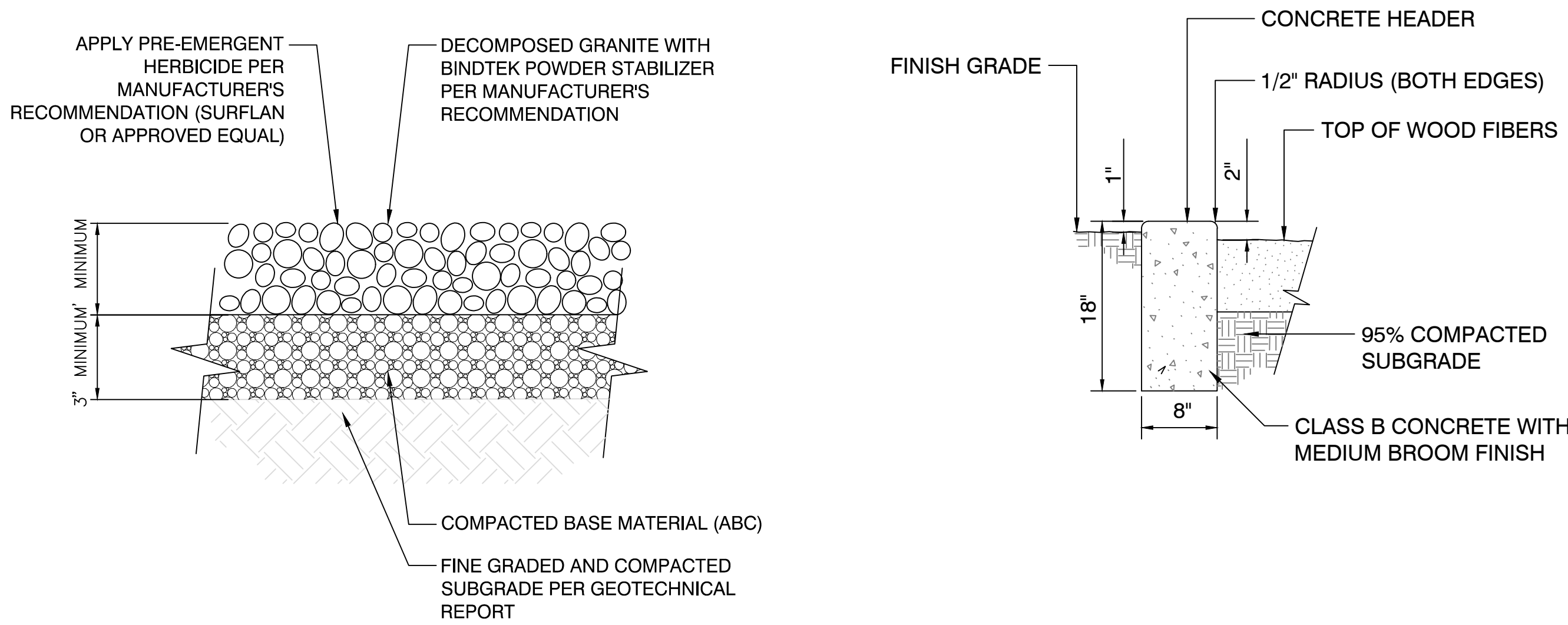
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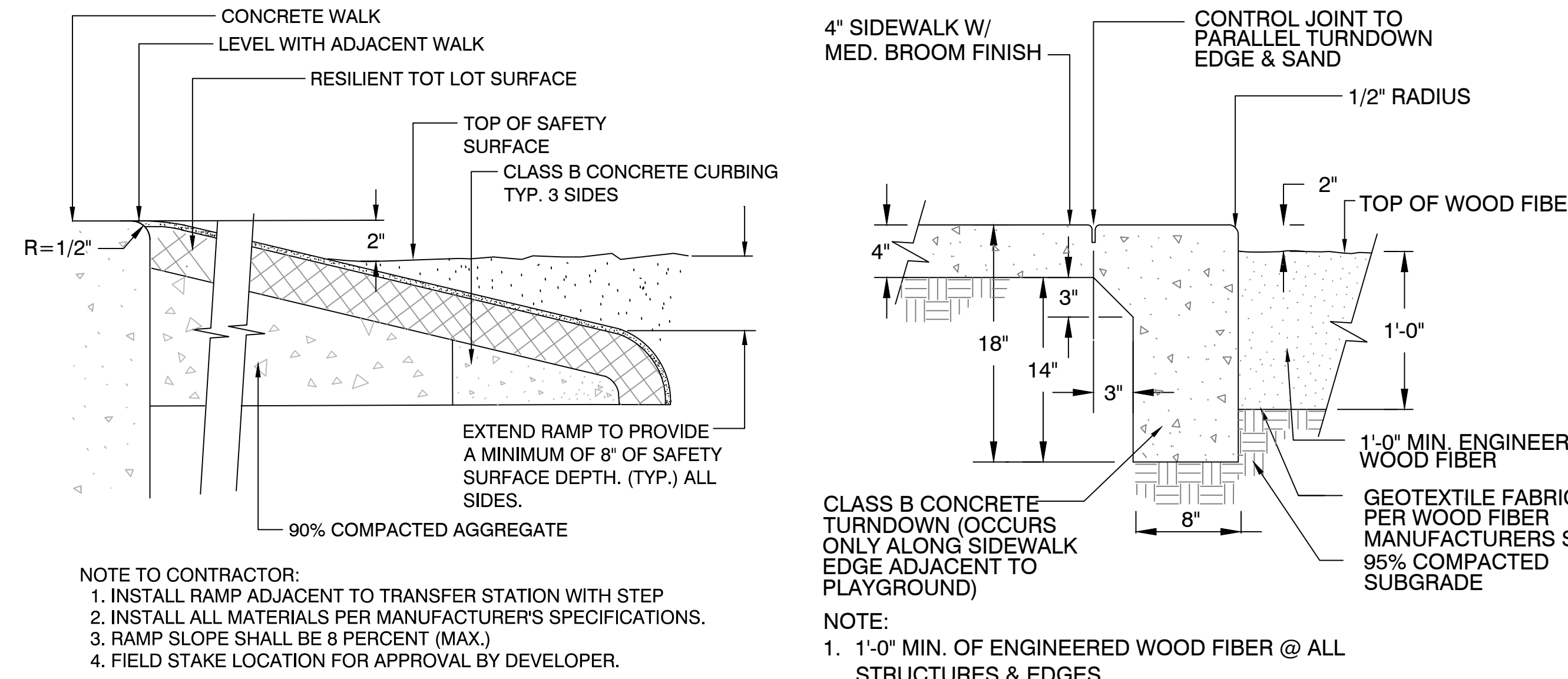
DISCIPLINE: LANDSCAPE ARCHITECTURE
HARDSCAPE DETAILS

LH.202
27 of 28
FS16-321

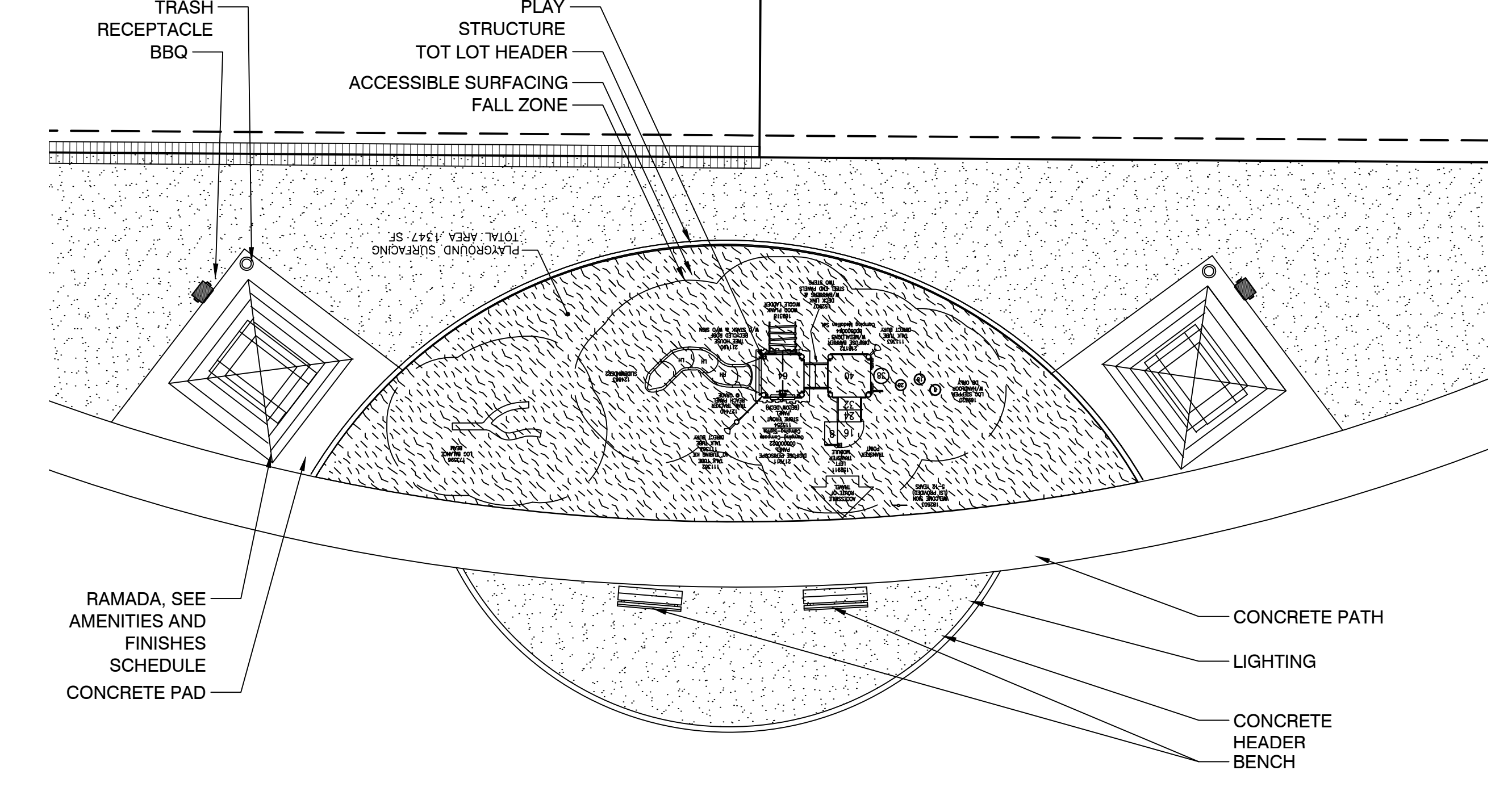
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SHEET SET INFORMATION: Sheet Set Name: ### Sheet Set Description: ###



1 STABILIZED DECOMPOSED GRANITE TRAIL
3" = 1'-0" M-CI3-12



2 TOT LOT HEADER
1" = 1'-0" M-CI3-34



3 ACCESSIBLE SURFACING DETAIL
3/4" = 1'-0" M-CI3-36

4 PLAYGROUND CONCRETE EDGE W/ SIDEWALK
1" = 1'-0" M-CI3-35

AMENITIES AND FINISHES SCHEDULE									
REFERENCE	NOTE	DESCRIPTION	COMPANY	MODEL NO.	SIZE	COLOR	PATTERN	FINISH	NOTES
LANDSCAPE ROCK									
-		DECOMPOSED GRANITE	GRANITE EXPRESS	-	1/2" SCREENED	MADISON GOLD	-	-	OR APPROVED EQUAL
GATES									
G-101		WROUGHT IRON VEHICLE PAINT	PER OWNER'S REPRESENTATIVE DUNN EDWARDS OR APPROVED EQUAL	-	PER PLANS -	- DE6042/LRV 7	-	TO BE PAINTED PAINT	CONTRACTOR TO PROVIDE SHOP DRAWINGS FOR ONE COAT PRIMER AND TWO COATS OF PAINT OR AS APPROVED BY OWNER'S REPRESENTATIVE
G-102		WROUGHT IRON VEHICLE GATE PAINT	PER OWNER'S REPRESENTATIVE DUNN EDWARDS OR APPROVED EQUAL	-	PER PLANS -	- DE6042/LRV 7	-	TO BE PAINTED PAINT	CONTRACTOR TO PROVIDE SHOP DRAWINGS FOR APPROVAL PRIOR TO FABRICATION ONE COAT PRIMER AND TWO COATS OF PAINT OR AS APPROVED BY OWNER'S REPRESENTATIVE
PAVING									
P-101		6" CONCRETE HEADER	PER OWNER'S REPRESENTATIVE	-	PER PLANS	NATURAL GRAY	-	SMOOTH TROWELED	
P-102		10' DECOMPOSED GRANITE PATH	PER OWNER'S REPRESENTATIVE	-	1/4" MINUS	DATE CREEK GOLD	-	-	
P-103		6' CONCRETE PATH	PER OWNER'S REPRESENTATIVE	-	PER PLANS	NATURAL GRAY	-	BROOM FINISH	REFER TO CIVIL PLANS FOR DETAILS
P-104		TOT LOT HEADER	PER OWNER'S REPRESENTATIVE	-	PER PLANS	NATURAL GRAY	-	-	
-		WOOD FIBER PLAY SURFACING	EXERPLAY, INC.	-	PER CONSULTANT	NATURAL BROWN	-	-	OR APPROVED EQUAL
-		ACCESSIBLE SURFACING	PEBBLE FLEX OR APPROVED EQUAL	-	AREA PER PLAN	BROWN BLEND	-	-	DEPTH PER CONSULTANT
SITE FURNISHINGS									
SF-101		12' SQUARE RAMADA	CLASSIC RECREATION	DENVER OR APPROVED EQUAL	12' SQUARE	ROOF: COOL LEAF GREEN FRAME: TERRA BROWN	-	POWDER COAT	COLUMNS TO BE WRAPPED WITH SPLITFACE CMU BLOCK AND PAINTED PER DETAILS; CONTRACTOR TO OBTAIN SHOP DRAWINGS PRIOR TO FABRICATION
SF-102		6' BENCH	WABASH VALLEY OR APPROVED EQUAL	PP411R	6'	GREEN	RIBBED	POWDER COAT	ACHOR TO CONCRETE PAD
SF-103		TRASH RECEPTACLE	WABASH VALLEY OR APPROVED EQUAL	LR350P, FT105 LID	32 GALLON	GREEN	DIAMOND	POWDER COAT	IN-GROUND MOUNT
SF-104		PICNIC TABLE	WABASH VALLEY OR APPROVED EQUAL	PP240P	6'	GREEN	PERFORATED	POWDER COAT	ACHOR TO CONCRETE PAD
SF-105		BBQ	PATTERSON WILLIAMS OR APPROVED EQUAL	1140-00, IN-GROUND MOUNT	-	BLACK	-	POWDER COAT	IN-GROUND MOUNT
SF-106		PLAY STRUCTURE	LANDSCAPE STRUCTURES OR APPROVED EQUAL	160791A	-	PALETTE D	-	-	INSTALL PER MANUFACTURER'S RECOMMENDATION
SF-107		MAILBOX	POSTAL PRODUCTS UNLIMITED, INC. OR APPROVED EQUAL	TYPE III CBU WITH PEDESTAL OR APPROVED EQUAL	-	BRONZE	-	-	
WALLS									
W-101		6' THEME WALL	-	-	6' WALL; 6'-4" COLUMN	-	-	-	
		AZ BEST BLOCK OR APPROVED EQUAL	SOLID	6" x 4" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS	
		AZ BEST BLOCK OR APPROVED EQUAL	CMU	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS	
		AZ BEST BLOCK OR APPROVED EQUAL	SMOOTH	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS	
W-102		6' SECONDARY WALL	-	-	6' WALL; 6'-4" COLUMN	-	-	-	
		AZ BEST BLOCK OR APPROVED EQUAL	SOLID	6" x 4" X 16"	TIERRA BROWN	-	SMOOTH	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS	
		AZ BEST BLOCK OR APPROVED EQUAL	CMU	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS	
		AZ BEST BLOCK OR APPROVED EQUAL	SMOOTH	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS	
W-103		6' PARTIAL VIEW FENCE	-	-	6' WALL; 6' COLUMN	-	-	-	
		AZ BEST BLOCK OR APPROVED EQUAL	CMU	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	TOP COURSES TO BE GROUTED SOLID AND SLOPED TO DRAIN; GROUT COLOR TO MATCH BLOCK, RAKED	
		AZ BEST BLOCK OR APPROVED EQUAL	SMOOTH	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	TOP COURSES TO BE GROUTED SOLID AND SLOPED TO DRAIN; GROUT COLOR TO MATCH BLOCK, RAKED	
		WROUGHT IRON FENCE	PER OWNER'S REPRESENTATIVE		2' WROUGHT IRO	TO BE PAINTED			
		WROUGHT IRON FENCE PAINT	DUNN EDWARDS OR APPROVED EQUAL	-	-	DE6042/LRV 7	-	-	ONE COAT PRIMER AND TWO COATS OF PAINT OR AS APPROVED BY OWNER'S REPRESENTATIVE
W-105		THEME PANEL	AZ BEST BLOCK OR APPROVED EQUAL	CMU	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS
W-106		END OF WALL COLUMN	AZ BEST BLOCK OR APPROVED EQUAL	CMU	6" x 4" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS
		AZ BEST BLOCK OR APPROVED EQUAL	CMU	6" X 8" X 16"	TIERRA BROWN	-	SPLIT FACE	GROUT COLOR TO MATCH BLOCK, RAKED JOINTS	
LIGHTING									
-		UPLIGHT	FX LUMINAIRE	NP SUPER SLOT	-	BRONZE	-	-	REFER TO ELECTRICAL PLANS

Civil Engineering

Water Systems

Wastewater Treatment

Land Planning

Energy

Land Survey

Landscape Architecture

Construction Management

Civil Engineering

Water Systems

Wastewater Treatment

Land Planning

Energy

Land Survey

Landscape Architecture

Construction Management

4550 N. 12th Street

Phoenix, AZ, 85014

phone 602.264.6831

fax 602.264.0928

web www.cvlci.com

OWNER / DEVELOPER
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1838 WEST PARKSIDE LANE
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PHOENIX, ARIZONA 85027
CONTACT: RICK TAYRIEN
PHONE: (480) 607.6580
rtayrien@gwhaz.com

LANDSCAPE ARCHITECT
Project Manager:
COE & VAN LOO CONSULTANTS, INC.
4550 N. 12TH STREET
PHOENIX, AZ 85014
CONTACT: EARL SWETLAND
PHONE: 602.285.4786
EMAIL: ESWETLAND@CVL.CI.COM

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SURPRISE, AZ 85379
CVL FILE NO.
01.0272201

REVISION HISTORY

SEAL & ISSUE

100%

DESIGN: ES
DRAWN: HP
CHECK: ES

DISCIPLINE: LANDSCAPE ARCHITECTURE
HARDSCAPE DETAILS

21411
EARL J.
SWETLAND
Lic. Exp. 9/22/16
ARIZONA U.S.A.
Expires 6-30-2016

LH.203
28 of 28
FS16-321



ACOMA COURT

Final Plat – January 17, 2017

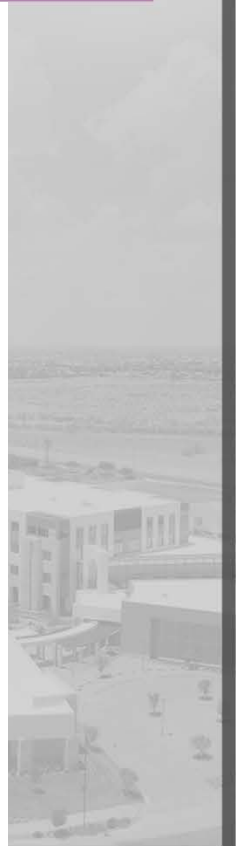
VICINITY MAP



VICINITY MAP









SURPRISE

ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date:	January 17, 2017	Contact Person:	Christina Ramirez
Submitting Department:	Human Service & Community Vitality	District:	Citywide
Staff Recommendations:	Approve		

Consent	x	Regular	Public Hearing	Report/Discussion
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Agenda Wording:

Consideration and action pertaining to approval of an amended Intergovernmental Agreement with Maricopa County for acceptance of HOME grant funding in the amount of \$136,692 as part of the Maricopa County Housing Consortium; Resolution # 2017-07.

Motion:

I move to approve Resolution # 2017-07.

Background:

HOME funding is provided by the U.S. Department of Housing and Urban Development (HUD) to municipalities in order to provide decent and affordable housing, for income qualified residents of Surprise. This funding will be applied towards the continuation of the Housing Rehabilitation program that addresses homes that are in need of health and safety repairs. The City of Surprise receives funding as a member of the Maricopa County Housing Consortium through an intergovernmental agreement. This is necessary as Surprise does not meet the necessary thresholds to receive HOME funding directly from HUD.

This IGA was approved by Council Resolution # 2016-129 on December 6, 2016. Due to minor changes to the agreement, Council approval is required again. These changes will not have an impact on how the City operates the program.

Objective Analysis:

The approval of this contract will allow the City to continue to provide services to residents for housing rehabilitation.

Policy Compliant:

The requested action is consistent with City and Council policies.

Financial Impact:

This one-time grant award includes \$136,692 for professional and outside services with a City match requirement of \$34,173 for a total project amount of \$170,865. The full City match requirement has been met prior to FY2017 and will be tracked by the Human Service and Community Vitality Department during this project's performance period.

Budget Impact:

Grant funding in the amount of \$136,700 has been included as part of the FY2017 Adopted Budget.

FTE Impact:

The item does not impact the overall full-time equivalent (FTE) count

ATTACHMENTS:

Click to download

- ☐ [Staff Report](#)
 - ☐ [Resolution # 2017-07](#)
 - ☐ [Revised IGA](#)
-



Human Service and Community Vitality

Date: January 17, 2017

To: Mayor and City Council

From: Seth Dyson, Human Service and Community Vitality Department
Christina Ramirez, Neighborhood Services Supervisor
Jason Hughes, Program Coordinator

Re: Intergovernmental Agreement/Maricopa County HOME funds

Introduction

The Neighborhood Services Division has been awarded \$136,692 for Program Year Fiscal Year 2017, from the U.S. Department of Housing and Urban Development (HUD) under the HOME program. Approval of the Intergovernmental Agreement with Maricopa County and its remaining members of the Consortium; City of Avondale, City of Chandler, Town of Gilbert, City of Glendale, City of Peoria, City of Scottsdale, and City of Tempe was granted at the December 06, 2016, Council Meeting. However, minor changes to the agreement such as terminology and chain of command have been made by Maricopa County to the previously approved agreement which requires Council consent to take effect. These changes will not have an impact on how the City of Surprise currently operates the program.

Background

HOME funding is provided by the U.S. Department of Housing and Urban Development (HUD) to municipalities in order to provide decent and affordable housing, for income qualified residents of Surprise. This funding will be applied towards the continuation of the Housing Rehabilitation program that addresses homes that are in need of health and safety repairs. The City of Surprise receives funding as a member of the Maricopa County Housing Consortium through an intergovernmental agreement. This is necessary as Surprise does not meet the necessary thresholds to receive HOME funding directly from HUD.

Previous Actions

Through the City's Annual Action Plan, HOME grant funds have previously been received for FY 2006-2016 through the HOME consortium and approved for the proposed activities. As of December 6, 2016, FY17 funding has been approved.

Conclusion

Accepting this award in the amount of \$136,692 from (HUD) through our revised intergovernmental agreement with Maricopa County for FY 2017, it is believed that the recommended projects and programs will provide assistance to residents in need, thus supporting the national objective and intent of the HOME program.

Recommendations

Approval of the revised Intergovernmental Agreement between Maricopa County and the City of Surprise.

RESOLUTION # 2017-07

A RESOLUTION OF THE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA, AMENDING THE INTERGOVERNMENTAL AGREEMENT BETWEEN THE CITY OF SURPRISE AND MARICOPA COUNTY TO CONFORM WITH REVISED REGULATIONS AND TERMINOLOGY.

WHEREAS, pursuant to Arizona Revised Statutes § 11-952, the City of Surprise has the authority to enter into intergovernmental agreements with other governmental entities;

WHEREAS, the Cities and Towns of Avondale, Chandler, Gilbert, Glendale, Peoria, Scottsdale, Surprise and Tempe, and Maricopa County have previously entered into an Intergovernmental Agreement (IGA) to form the Maricopa HOME Consortium (HOME Consortium IGA) to receive, distribute and administer HOME Investment Partnerships Funds (HOME);

WHEREAS, the intergovernmental agreement between City of Surprise and Maricopa County for the receipt of grant funding in the amount of \$136,692 with a match requirement of \$34,173, was approved by Council on December 6, 2016 through Resolution 2016-129, and

WHEREAS, Maricopa County has informed the City of revisions to the IGA which requires Council approval.

NOW, THEREFORE, BE IT RESOLVED by the Mayor and Council of the City of Surprise, Arizona, as follows.

Section 1. The amendment between the City of Surprise and Maricopa County, attached as *Exhibit A*, is hereby approved and the Mayor is hereby directed to execute the agreement and any related documents on behalf of the City.

APPROVED AND ADOPTED this ____ day of _____, 2017.

Sharon R. Wolcott, Mayor

Attest:

Approved as to form:

Sherry Aguilar, City Clerk

Robert Wingo, City Attorney

EXHIBIT A



INTERGOVERNMENTAL AGREEMENT
FOR SERVICES BETWEEN
MARICOPA COUNTY
ADMINISTERED BY ITS
HUMAN SERVICES DEPARTMENT
AND
THE CITY OF SURPRISE



Contract Amount: \$136,692

Contract Start Date: July 1, 2016

Contract Termination Date: 24 months from date fully executed

Contract Number: _____

CFDA Number: 14.239, HOME Investment Partnerships Program

DUNS Number: 021648936

This Intergovernmental Agreement for services ("Agreement") is entered into by and between the City of Surprise, a member of the HOME Consortium (hereinafter referred to as the "City and/or "Subrecipient"), and Maricopa County, administered by its Human Services Department, (hereinafter referred to as the "County" or "Lead Agency" or "Department"). The Subrecipient and County are collectively referred to herein as the "Parties" and individually as a "Party."

The County shall provide financial reimbursement in an Agreement amount up to One Hundred Thirty Six Thousand Six Hundred Ninety-Two Dollars (\$136,692) subject to the terms of this Agreement and availability of funds. This Agreement amount constitutes the County's entire participation and obligation in the performance and completion of all work to be performed under this Agreement.

The Subrecipient, for and in consideration of the covenants and conditions set forth in this Agreement, shall provide and perform the services set forth herein. All rights and obligations of the Parties shall be governed by the terms of this Agreement, its exhibits, attachments, and appendices, including any Subcontracts, Amendments, or Change Orders as set forth herein and in:

Section I - General Provisions - Contain uniform administrative requirements applicable to both Parties participating in the HOME Investment Partnerships (HOME) Program, which include, but are not limited to, definitions; non-discrimination and equal opportunity requirements; disclosure and retention requirements; and debarment, suspension, or ineligibility exclusions.

Section II - Special Provisions - Provides specific programmatic requirements upon the Subrecipient that are established by the HOME Program and applicable HUD regulations. This includes, but is not limited to, disposition of program income; financial record management; reporting requirements; and Subrecipient certifications.

Section III - Work Statement - The section contains, but is not limited to, a narrative of the project; a list of the tasks to be performed; established goals; performance measures; scheduling; budget; planned expenditures of income.

Section IV - Compensation - Contains provisions relating to compensation for Subrecipient, method of payment, terms of reimbursement, conditions prior to the release of funds.

Section V - Attachments & Forms - Contains the Certification and Request For Reimbursement Form; Maximum Subsidy Limits for Rental 221 (d) 3 Limits; Monthly Summary of Program Income and Recaptured Funds; HOME Funds Match Certification Form.

SUBRECIPIENT

Representative: Christina Ramirez, Neighborhood Services Supervisor

Phone: 623-222-3238

E-mail: Christina.Ramirez@surpriseaz.gov

Address: 16000 N. Civic Center Plaza, Surprise, AZ 85374

LEAD AGENCY

Representative: Rachel Miner, Assistant Director, Housing and Community Development

Phone: 602-372-1528

E-mail: MinerR@mailmaricopa.gov

Address: 234 N. Central Avenue, Third Floor, Phoenix, AZ 85004

Notice under this Agreement shall be given by personal delivery or by registered or certified mail, postage prepaid and returned receipt requested, to the persons at the addresses set forth above and shall be effective three (3) days after being mailed unless otherwise indicated in the notice.

This Agreement contains all the terms and conditions agreed to by the Parties. No other understanding, oral or otherwise, regarding the subject matter of this Agreement shall be deemed to exist or to bind any Party hereto. Nothing in this Agreement shall be construed as consent to any lawsuit or waiver of any defense in a lawsuit brought against the State of Arizona, County, or the Subrecipient in any State or federal court.

IN WITNESS WHEREOF, the Parties have signed this Agreement:

Approved By:
SUBRECIPIENT

Approved By:
MARICOPA COUNTY (LEAD AGENCY)

Authorized Signature

Chairman, Board of Supervisors

Date

Date

Attested to:

Attested to:

City/Town Clerk

Fran McCarroll, Clerk of the Board

Date

Date

IN ACCORDANCE WITH A.R.S. §§ 11-952, THIS AGREEMENT HAS BEEN REVIEWED BY THE UNDERSIGNED DEPUTY COUNTY ATTORNEY, AND, IN ACCORDANCE WITH A.R.S. § 11-952, THIS AGREEMENT HAS BEEN REVIEWED BY THE UNDERSIGNED ATTORNEY FOR SUBRECIPIENT ON BEHALF OF SUBRECIPIENT, AS TO THEIR RESPECTIVE CLIENTS ONLY, EACH ATTORNEY HAS DETERMINED THAT THIS AGREEMENT IS PROPER IN FORM AND WITHIN THE POWER AND AUTHORITY GRANTED UNDER THE LAW OF THE STATE OF ARIZONA.

APPROVED AS TO FORM :

APPROVED AS TO FORM :

Attorney for the Subrecipient Date

Deputy County Attorney Date

SECTION I
GENERAL PROVISIONS



MARICOPA COUNTY
HUMAN SERVICES DEPARTMENT

A. PURPOSE

County shall provide Subrecipient with U.S. Department of Housing and Urban Development (HUD) HOME Investment Partnership Program funds for the provision of HOME activities as identified in Section III Work Statement.

B. TERM

The term of this Agreement shall commence upon July 1, 2016, and shall remain in effect for 24 months from the date fully executed. The Agreement shall become effective upon approval and signature by both Parties.

C. RENEWAL

The Agreement may be renewed by a written amendment, provided however, that Subrecipient is in full compliance with all terms and conditions of this Agreement. The County shall notify the Subrecipient in writing of its intent to extend the contract term at least thirty (30) calendar days prior to the expiration of the original contract term, or any additional terms thereafter.

D. AMENDMENTS

All Amendments to this Agreement shall be in writing and signed by both Parties, and be requested to the County no later than ninety (90) days prior to contract expiration.

E. TERMINATION

1. Pursuant to A.R.S. §38-511, Parties may cancel this Agreement without penalty or further obligation within three years after execution of the contract, if any person significantly involved in initiating, negotiating, securing, drafting or creating the contract on behalf of a Party is at any time while the Agreement or any extension of the Agreement is in effect, an employee or agent of any other party to the Agreement in any capacity or consultant to any other party of the Agreement with respect to the subject matter of the Agreement. Additionally, pursuant to A.R.S. §38-511 the Parties may recoup any fee or commission paid or due to any person significantly involved in initiating, negotiating, securing, drafting or creating the contract on behalf of the Party from any other party to the contract arising as the result of the Agreement.
2. Either Party may terminate this Agreement at any time by giving the other Party at least sixty (60) calendar days prior notice in writing (unless terminated by the County under the Availability of Funds provision). The notice shall be given by personal delivery or by registered or certified mail, postage prepaid and returned receipt requested to the persons at the addresses set forth on Page Two of this Agreement.
3. This Agreement may be terminated by mutual written agreement of the Parties specifying the termination date therein.
4. The County has the right to terminate this Agreement upon twenty-four (24) hour notice when the County deems the health or welfare of the service recipients are endangered or Subrecipient's non-compliance jeopardizes funding source financial participation. If not terminated by one of the above methods, this Agreement will terminate upon the expiration of the term of this Agreement stated on the Page One of this Agreement.
5. In accordance with 2 CFR § 200, et seq., County may suspend or terminate this Agreement if Subrecipient violates any term or condition of this Agreement or if Subrecipient fails to maintain a good faith effort to carry out the purpose of this Agreement.
6. County or Subrecipient may terminate this Agreement for convenience in accordance with 2 CFR § 200, et seq. Both Parties shall agree upon the termination conditions including the effective date of the termination. The party initiating the termination shall notify the other party in writing stating the reasons for such termination.

F. EFFECT

To the extent that the Special Provisions are in conflict with the General Provisions, the Special Provisions shall control. To the extent that the Work Statement and the Special or General Provisions are in conflict, the Work Statement shall control. To the extent that the Compensation Provisions are in conflict with the General Provisions, Special Provisions or Work Statement, the Compensation Provisions shall control. Nothing herein shall operate to increase the Operating Budget without a written amendment thereto.

G. DEFINITIONS

As used throughout this Agreement, the following terms shall have the following meanings:

1. Annual Action Plan means the annual plan submitted by the County as the lead agency of the Maricopa HOME Consortium that describes the Consortium's annual program goals.
2. Assistant Director means the Director of the Community Development Division within the Human Services Department.
3. Beneficiary means a person or household that meets the income requirements of 24 CFR 92.203 subject to the restriction on assistance to students enrolled in an institution of higher education, as described in 24 CFR 5.612.
4. Commitment means an executed legally binding written agreement with a Subrecipient or a contractor to use a specific amount of HOME funds to produce affordable housing, provide down-payment assistance or tenant based rental assistance. An agreement between the representative unit and a member unit of general local government of the Consortium does not constitute a commitment as described in 24 CFR Part 92.2(1) and (2).
5. Consortium Agreement means the Intergovernmental Agreement (IGA) between members of the Maricopa County HOME Consortium entered into on or about June 29, 2005 which automatically renews for successive 3-year terms and expires on or about June 30, 2018.
6. Contract Administrator means the person identified in page 2 of this Agreement who is responsible for administering this Agreement on behalf of the County.
7. County means Maricopa County by and through its Human Services Department as the Lead Agency of the Maricopa HOME Consortium.
8. Contractor/Subcontractor means a non-profit or for-profit organization carrying out HOME related project activities as described in the written agreement between the City and the Developer.
9. Director means the Director of the Maricopa County Human Services Department.
10. Division means the Housing & Community Development Division of the Human Services Department.
11. Fidelity Bond means a bond to indemnify the Subrecipient against losses resulting from fraud or lack of integrity, honesty or fidelity of one or more employees, officers or other persons holding a position of trust.
12. Five Year Consolidated Plan means the HUD required Consolidated Plan submitted by the County as the lead agency for the Maricopa HOME Consortium.
13. HOME means HOME Investment Partnerships Program.
14. HUD means U.S. Department of Housing and Urban Development.
15. Juvenile means any person under the age of eighteen (18).
16. Lead Agency or Department means Maricopa County Human Services Department, Housing and Community Development Division. The Lead Agency is designated per the Intergovernmental Agreement authorized and adopted by the HOME Consortium members' legislative bodies.
17. Low-income families means families whose annual incomes do not exceed 80 percent of the median income for the area, as determined by HUD, with adjustments for smaller and larger families, except that HUD may establish income ceilings higher or lower than 80 percent of the median for the area on the basis of HUD findings that such variations are necessary because of prevailing levels of construction costs or fair market rents, or unusually high or low family

- incomes. An individual does not qualify as a low-income family if the individual is a student who is not eligible to receive Section 8 assistance under 24 CFR 5.612.
18. Maricopa HOME Consortium means the group of jurisdictions that participate in the Three-Year Cooperative Consortium Agreement with Maricopa County.
 19. Maricopa HOME Consortium Current Practices Manual or Current Practices Manual is the manual adopted by the Maricopa HOME Consortium for the administration of Projects.
 20. Minority Business Enterprise (MBE) means an entity which is majority owned or controlled by a socially and economically disadvantaged individual as described by Public Law 95-507.
 21. Net Proceeds means the amount remaining after deducting non-HOME debt and closing costs from the sale of a HOME funded asset, obligation or loan.
 22. Women's Business Enterprise (WBE) means an entity in which a woman has majority ownership and control.
 23. Payment Bond means a bond executed to assure payment as required by law of all persons performing work or providing materials in the execution of work provided in this Agreement.
 24. Performance Bond means a bond executed to secure fulfillment of all of the Subrecipient's obligations under this Agreement.
 25. Program means HOME Subrecipient's receipt of funds to carry out programs (e.g., down payment assistance, homeowner rehabilitation, or tenant-based rental assistance programs, etc.), and not to undertake specific projects. (Entities that carry out projects are generally owners, developers, or sponsors.) The Work Statement included herein describes the Subrecipient programs to be administered.
 26. Projects means rehabilitation or new construction (with or without acquisition) as described in a legally binding agreement between the HOME Subrecipient and the prospective owners or beneficiaries of the HOME funds for which all necessary financing has been secured and budgeted and for which an acquisition, construction and/or rehabilitation schedule has been established, and underwriting has been completed and otherwise complies with CFR Part 92.2 (2) and 92.2 (A) and (B).
 27. Public Agency has the meaning prescribed by A.R.S. § 11-951.
 28. Subcontract means any contract entered into by a Subrecipient with a third party for performance of any of the work or provision of any of the services covered by this Agreement.
 29. Subrecipient means a public agency administering all requirements of the HOME program and is the member unit of a general local government, person, firm or organization listed on the Cover Page of this Agreement.
 30. Vendor means an entity funded through the Subrecipient to provide services required by the Work Statement.
 31. Very low-income families means low-income families whose annual incomes do not exceed 50 percent of the median family income for the area, as determined by HUD with adjustments for smaller and larger families, except that HUD may establish income ceilings higher or lower than 50 percent of the median for the area on the basis of HUD findings that such variations are necessary because of prevailing levels of construction costs or fair market rents, or unusually high or low family incomes. An individual does not qualify as a very low-income family if the individual is a student who is not eligible to receive Section 8 assistance under 24 CFR 5.612.
 32. Work Statement means the section of this Agreement that contains a description of services to be delivered pursuant to this Agreement.

H. GENERAL REQUIREMENTS

1. The terms of this Agreement shall be construed in accordance with Arizona law and the applicable regulations of the United States Department of Housing and Urban Development (HUD). Any lawsuit arising out of this Agreement shall be brought in the appropriate court in Maricopa County, Arizona.

2. The Subrecipient shall, without limitation, obtain and maintain all licenses, permits, and authority necessary to do business, render services, and perform work under this Agreement, and shall comply with all laws regarding unemployment insurance, disability insurance, and workers' compensation.
3. The Subrecipient is independent in the performance of work and the provision of services under this Agreement and shall comply with all laws regarding unemployment insurance, disability insurance and workers compensation.
4. Subrecipient shall comply with the regulations prohibiting a conflict of interest, and not make any payments, either directly or indirectly, to any person, partnership, corporation, trust or other organization that has a substantial interest in Subrecipient's organization or with which Subrecipient (or one of its directors, officers, owners, trust certificate holders or a relative thereof) has a substantial interest, unless Subrecipient has made full written disclosure of the proposed payments to the County and has received written approval therefore. For purposes of this provision, the terms "substantial interest" and "relative" shall have the meanings prescribed by A.R.S. § 38-502.

I. ACCEPTANCE OF FUNDS

Subrecipient hereby accepts the award of funds under the terms of this Agreement and agrees to execute and return this Agreement to the County within 30 days of receipt unless Subrecipient received a written waiver of this requirement by the County.

J. ASSIGNMENT AND SUBCONTRACTING

No right, liability, obligation or duty under this Agreement may be assigned, delegated or subcontracted, in whole or in part, without the prior written approval of the County. Subrecipient shall bear all liability under this Agreement, even if it is assigned, delegated or subcontracted, in whole or in part, unless the County agrees otherwise.

K. AVAILABILITY OF FUNDS

1. The provisions of this Agreement relating to the payment for services shall become effective when funds assigned for the purpose of compensating the Subrecipient, as provided herein, are actually available to the County for disbursement. The Director shall be the sole authority in determining the availability of funds under this Agreement and the County shall keep the Subrecipient fully informed as to the availability of funds.
2. If any action is taken by any State agency, federal department or any other agency or instrumentality to suspend, decrease or terminate its fiscal obligation under, or in connection with this Agreement, the Parties may amend, suspend, decrease or terminate its obligations under or in connection with this Agreement. In the event of termination, the Parties shall be liable for payment only for services rendered prior to the effective date of the termination, provided that such services performed are in accordance with the provisions of this Agreement. The Parties shall give written notice of the effective date of any suspension, amendment, or termination under this section at least ten (10) calendar days in advance.

L. BUDGET ADJUSTMENTS

Subrecipient must receive prior written approval from the County to move funds from one Budget Activity Line Item to another. Budget adjustments that do not change the Agreement Amount may be documented by an Amendment signed by the Director and the Subrecipient's Representative. If the County agrees to the budget adjustments that increase the Agreement amount, the County shall follow section D of this Agreement to amend this Agreement. Any requests for reasonable budget adjustments must be submitted ninety (90) days prior to the expiration of this Agreement. Requests for adjustments to this Agreement must be supported by appropriate documentation. The Subrecipient shall not retain any funds drawn down in excess of immediate cash needs (to be used within 15 days of draw down) to cover subsequent requests for reimbursement, and must return them to the County within 30 days

of receipt. The Subrecipient must also return to the County any interest that is earned on these funds that are drawn down and not expended for eligible costs within 15 days of draw down.

M . DISPUTES

1. Except as may otherwise be provided for in this Agreement, any dispute arising out of this Agreement that is not resolved between the Parties within a reasonable period of time, which shall not exceed one hundred twenty (120) days, shall be submitted in accordance with the following dispute resolution process.
2. Notice of the specific grounds of a dispute shall be in writing and filed with the Assistant Director within ten (10) working days from the date Subrecipient knew or should have known of the basis of the dispute. The Assistant Director shall respond in writing to Subrecipient within fourteen (14) working days. The decision of the Assistant Director shall be final and conclusive unless, within seven (7) working days from the date Subrecipient is served with the decision, Subrecipient files a written notice of appeal with the Human Services Department Director, who shall provide Subrecipient with a written response within fourteen (14) working days following receipt of Subrecipient's notice of appeal. The decision of the Director shall be final and not appealable.
3. Pending a final decision of the Director, the Subrecipient shall proceed diligently with its performance of this Agreement in accordance with the Assistant Director's decision.

N . DEFAULT AND REMEDIES FOR NON COMPLIANCE

1. Notwithstanding anything to contrary, this Section shall not be deleted or superseded by any other provision of this Agreement.
2. This Agreement may be immediately terminated by the County if the Subrecipient defaults by failing to perform any objective or breaches any obligation under this Agreement, or any event occurs that jeopardizes the Subrecipient's ability to perform any of its obligations under this Agreement. The County reserves the right to have service provided by persons other than the Subrecipient if the Subrecipient is unable or fails to provide required services with the specified time frame.
3. Failure to comply with the requirements of this Agreement and all the applicable federal, state, or local laws, rules, and regulations may result in suspension or termination of this Agreement, the return of unexpended funds (less just compensation for work satisfactorily completed that, to date, has not been paid), the reimbursement of funds improperly expended, or the recovery of funds improperly acquired. Noncompliance includes, but is not limited to:
 - a. Nonperformance of any obligations required by this Agreement.
 - b. Noncompliance with any applicable federal, state, or local laws, rules or regulations, including HUD guidelines, policies, or directives.
 - c. Unauthorized expenditure of funds.
 - d. Violation of the applicable affordability period.
 - e. Improper disposition of resale or recapture proceeds.
 - f. Improper disposition of program income.
 - g. Noncompliance with applicable financial record requirements, accounting principles, or standards established by 2 CFR 200 et seq.
 - h. Noncompliance with recordkeeping, record retention, or reporting requirements.
4. Notwithstanding the suspension or termination of this Agreement, or the final determination of the proper disposition of funds, Subrecipient shall, without intent to limit or with restrictions, be subject to the following:
 - a. All awards of funding shall be immediately revoked, and any approvals related to the project described in the Special Provision or Work Statement shall be deemed revoked and canceled. Thereby, any entitlements to compensation after suspension or termination of this Agreement are similarly revoked and unavailable.

- b. Not be relieved of any liability or responsibility associated with the Special Provision or Work Statement.
 - c. Acknowledge that suspension or termination of this Agreement does not affect or terminate any rights against the Subrecipient at the time of suspension or termination, or that may accrue later. Nothing herein shall be construed to limit or terminate any right or remedy available under contract or rule.
 - d. Waiver of a breach or default of any term, covenant, or condition of this Agreement or any federal, state, or local law, rule, or regulation shall not operate as a waiver of any subsequent breach of the same or any other term, covenant, condition, law, rule, or regulation.
5. The Subrecipient shall, upon notice or with knowledge obtained by itself or others, take any and all proactive actions necessary, and provide any and all applicable remedies to address and correct any act by itself, its employees, officials, successors, assigns, contractors, or subcontractors that resulted in any wrongdoing (intentional or unintentional); misuse or misappropriation of funds; the incorrect or improper disposition of funds; any violation of any federal, state, or local law, rule, or regulation; or the breach of any certification or warranty provided in this Agreement
- O. SEVERABILITY
Any provision of this Agreement that is determined to be invalid, void or illegal by a court shall in no way affect, impair or invalidate any other provision hereof, and the remaining provisions shall remain in full force and effect.
- P. STRICT COMPLIANCE
The County's acceptance of Subrecipient's performance that is not in strict compliance with the terms hereof shall not be deemed to waive the requirements of strict compliance for all future performance. All changes in performance obligations under this Agreement shall be in writing and signed by both Parties.
- Q. NON-LIABILITY
The County, its officers, representatives, agents and employees shall not be liable for any act or omission by the Subrecipient or Vendor or any officer, representative, agent or employee of Subrecipient or Vendor occurring in the performance of this Agreement, nor shall these entities be liable for purchases or contracts made by the Subrecipient, Vendor or any officer, representative, agent and employee of Subrecipient or Vendor, in connection with this Agreement.
- R. INDEMNIFICATION
To the extent permitted by law, the Subrecipient shall, and shall cause any of its Subcontractors to, indemnify,, defend save and hold harmless the State of Arizona and Maricopa County, any jurisdiction or agency issuing any permits for any work arising out of this Agreement, and their respective directors, officers, officials, agents, and employees (hereinafter referred to as "Indemnitee") from and against any and all claims, actions, liabilities, damages, losses, or expenses (including court costs, attorneys' fees, and costs of claim processing, investigation and litigation) (hereinafter referred to as "Claims") for bodily injury or personal injury (including death), or loss or damage to tangible or intangible property caused, or alleged to be caused, in whole or in part, by the negligent or willful acts or omissions of Subrecipient and any of its Subcontractors, or any of the directors, officers, agents, or employees of Subrecipient and any of its Subcontractors. This indemnity includes any claim or amount arising out of or recovered under the Workers' Compensation Law or arising out of the failure of the Subrecipient or any of its Subcontractors to conform to any federal, state or local law, statute, ordinance, rule, regulation or court decree. It is the specific intention of the Parties that the Indemnitee shall, in all instances, except for Claims arising solely from the negligent or willful acts or omissions of the Indemnitee, be indemnified by the Subrecipient and any of its

Subcontractors from and against any and all claims. It is agreed that the Subrecipient and any of its Subcontractors will be responsible for primary loss investigation, defense and judgment costs where this indemnification is applicable.

S. TECHNICAL ASSISTANCE

The County will provide reasonable technical assistance to the Subrecipient to assist in complying with State and federal laws, regulations and accountability for diligent performance and compliance with the terms and conditions of this Agreement and all applicable laws, regulations and standards. However, this assistance in no way relieves the Subrecipient of full responsibility and accountability for its actions and performance in compliance with the terms of this Agreement.

T. SINGLE AUDIT ACT REQUIREMENTS

Subrecipient is in receipt of federal funds through the County. The funds are subject to the federal audit requirements of the Single Audit Act of 1984, as amended (Pub.L.No.98-502) (codified at 31 U.S.C. §§ 7501, et seq.). Subrecipients shall comply with 2 CFR 200 Subpart F. Upon completion, such audits shall be made available for public inspection. Audits shall be submitted to the County within the twelve (12) months following the close of the fiscal year. Subrecipient shall take corrective actions within six (6) months of the date of receipt of the reports. The County shall consider sanctions as described in 2 CFR 200.505 when the Subrecipient is noncompliant with the audit requirements.

U. AUDIT DISALLOWANCES

1. The Subrecipient shall, upon written notice thereof, reimburse the County for any payments made under this Agreement that are disallowed by a federal, State or County audit in the amount of the disallowance, as well as court costs and attorney's fees the County spends to pursue legal action relating to a disallowance. Court costs and attorney's fees incurred will be specifically identified as applicable to the recovery of the disallowed costs in question.
2. If the County determines that a cost for which payment has been made is a disallowed cost, the County will notify the Subrecipient in writing of the disallowance and the required course of action, which shall be at the option of the County, either to adjust any future claim submitted by the Subrecipient by the amount of the disallowance or to require immediate repayment of the disallowed amount by the Subrecipient issuing a check payable to the County.

V. STAFF AND VOLUNTEER TRAINING

The Lead Agency may make available to the Subrecipient the opportunity to participate in any applicable training activities conducted by the County.

W. CLEAN AIR ACT

If the total face value of this Agreement exceeds \$100,000, the Subrecipient agrees to comply with all regulations, standards and orders issued pursuant to the Clean Air Act of 1970, as amended (42 U.S.C. §§ 7401, et seq.), to the extent any are applicable by reason of performance of this Agreement.

X. LOBBYING

1. No federal appropriated funds have been paid or will be paid by or on behalf of the Subrecipient to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
2. If any funds, other than federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a

member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any federal contract, grant, loan or cooperative agreement, the Subrecipient shall complete and submit OMB Form -LLL, titled "Disclosure of Lobbying Activities," in accordance with its instructions and 31 U.S.C. § 1352.

Y. RELIGIOUS ACTIVITIES

The Subrecipient agrees that none of its costs and none of the costs incurred by any Vendor will include any expense for any religious activity.

Z. POLITICAL ACTIVITY PROHIBITED

None of the funds, materials, property or services contributed by the County or the Subrecipient under this Agreement shall be used for any partisan political activity, or to further the election or defeat of any candidate for public office.

AA. COVENANT AGAINST CONTINGENT FEES

The Subrecipient warrants that no person or entity has been employed or retained to solicit or secure this Agreement upon an agreement or understanding for a commission, percentage, brokerage or contingent fee. For breach or violation of this warranty, the County may immediately terminate this Agreement without liability.

BB. SAFEGUARDING OF PARTICIPANT INFORMATION

The use or disclosure by any Party of any information concerning an applicant for, or recipient of, services under this Agreement is directly limited to the purpose of this Agreement. Subrecipient and its agents shall safeguard the confidentiality of this information as required by federal and state law. Subrecipient shall include a clause to this effect in all Subcontracts.

CC. RIGHTS IN DATA

The Parties shall have the use of data and reports resulting from this Agreement without cost or other restriction, except as otherwise provided by law or applicable regulation. Each Party shall supply to the other Party, upon request, any available information that is relevant to this Agreement and to the performance hereunder.

DD. COPYRIGHTS

If this Agreement results in a book or other written material, the author is free to copyright the work, but the County reserves a royalty-free, nonexclusive, perpetual and irrevocable license to reproduce, publish, or otherwise use and to authorize others to use, all copyrighted material and all material which can be copyrighted resulting from this Agreement.

EE. PATENTS

Any discovery or invention arising out of, or developed in the course of, work aided by this Agreement shall be promptly and fully reported to the County for determination as to whether patent protection on such invention or discovery shall be sought and how the rights in the invention or discovery, including rights under any patent issued thereon, shall be disposed of and administered, in order to protect the public interest.

FF. AGREEMENT COMPLIANCE MONITORING

The Lead Agency will monitor the Subrecipient's compliance with, and performance under, the terms and conditions of this Agreement and the applicable federal regulations promulgated by HUD. On-site visits for compliance monitoring may be made by the Lead Agency at any time during the Subrecipient's normal business hours, announced or unannounced. During an on-site visit, the Subrecipient shall make all of its records and accounts related to work performed or services provided under this Agreement available to the Lead Agency for inspection and copying. In the event of conflict

between the terms of this Agreement and the terms of the Consortium Agreement or the Current Practices Manual, the terms of this Agreement control.

GG. CONTINGENCY RELATING TO OTHER CONTRACTS AND GRANTS

1. The Subrecipient shall, during the term of this Agreement, immediately inform the Contract Administrator in writing of the award of any other agreement or grant, including any other agreement or grant awarded by the County, where the award may affect either the direct or indirect costs being paid or reimbursed under this Agreement. Failure by the Subrecipient to notify the County of such award shall be considered a violation of this Agreement and the County may immediately terminate this Agreement without liability.
2. The Contract Administrator may request, and the Subrecipient shall provide within a reasonable time, which shall not exceed ten (10) working days, a copy of such other agreement or grant, when in the opinion of the Contract Administrator the award of the agreement or grant may affect the costs being paid or reimbursed under this Agreement.
3. If the Contract Administrator determines that the award to the Subrecipient of such other agreement or grant has affected the costs being paid or reimbursed under this Agreement, the Administrator will prepare an amendment to this Agreement affecting a cost adjustment. If the Subrecipient disputes the proposed cost adjustment, the dispute shall be resolved pursuant to the "Disputes" section contained herein.

HH. MINIMUM WAGE REQUIREMENTS

The Subrecipient warrants that it shall pay all its employees who are performing work or providing services under this Agreement not less than the minimum wage specified under Section 206(a)(1) of the Fair Labor Standards Act of 1938, as amended (29 U.S.C. §§ 201, et seq.) by law, regulation or Executive Order 13658.

II. RECOGNITION OF COUNTY SUPPORT

The Subrecipient shall give recognition to the County and the funding source for its support when the Subrecipient publishes materials or releases public information that is paid for in whole or in part with funds received by the Subrecipient under this Agreement.

JJ. INSURANCE

1. Subrecipient shall purchase and maintain the herein stipulated minimum insurance from a company or companies duly licensed by the State of Arizona and possessing a current A.M. Best, Inc. rating of B++6. In lieu of State of Arizona licensing, the stipulated insurance may be purchased from a company or companies who are authorized to do business in the State of Arizona, provided that said insurance companies meet the approval of County. The form of any insurance policies and forms must be acceptable to County.
2. All insurance required herein shall be maintained in full force and effect until all work or service required to be performed under the terms of the Agreement is satisfactorily completed and formally accepted. Failure to do so may, at the sole discretion of County, constitute a material breach of this Agreement.
3. Subrecipient's insurance shall be primary insurance as respects County, and any insurance or self-insurance maintained by County shall not contribute to it.
4. Any failure to comply with the claim reporting provisions of the insurance policies or any breach of an insurance policy warranty shall not affect coverage afforded under the insurance policies to protect County.
5. The insurance policies may provide coverage that contains deductibles or self-insured retentions. Such deductible and/or self-insured retentions shall not be applicable with respect to the coverage provided to County under such policies. Subrecipient shall be solely responsible for the deductible and/or self-insured retention and County, at its option, may

- require Subrecipient to secure payment of such deductibles or self-insured retentions by a surety bond or an irrevocable and unconditional letter of credit.
6. County reserves the right to request and to receive, within 10 working days, certified copies of any or all of the herein required insurance certificates. County shall not be obligated to review policies and/or endorsements or to advise Subrecipient of any deficiencies in such policies and endorsements, and such receipt shall not relieve Subrecipient from, or be deemed a waiver of County's right to insist on strict fulfillment of Subrecipient's obligations under this Agreement.
 7. The insurance policies required by this Agreement, except Workers' Compensation, shall name County, its agents, representatives, officers, directors, officials and employees as Additional Insured's.
 8. The policies required hereunder, except Workers' Compensation, shall contain a waiver of transfer of rights of recovery (subrogation) against County, its agents, representatives, officers, directors, officials and employees for any claims arising out of Subrecipient's work or service.
 9. The Subrecipient's policies shall stipulate that the insurance afforded the Subrecipient shall be primary insurance and that any insurance carried by the County, its agents, officials, employees or the State of Arizona shall be excess and not contributory insurance, as provided by A.R.S. § 41-621 (E).
 10. Coverage provided by the Subrecipient shall not be limited to the liability assumed under the indemnification provisions of this Agreement.
 11. Commercial General Liability:
 - a. Commercial General Liability insurance and, if necessary, Commercial Umbrella insurance with a limit of not less than \$2,000,000 for each occurrence, \$2,000,000 Products/Completed Operations Aggregate, and \$4,000,000 General Aggregate Limit. The policy shall include coverage for premises liability, bodily injury, broad form property damage, personal injury, products and completed operations and blanket contractual coverage, and shall not contain any provisions which would serve to limit third party action over claims. There shall be no endorsement or modifications of the CGL limiting the scope of coverage for liability arising from explosion, collapse, or underground property damage.
 12. Workers' Compensation:
 - a. Workers' Compensation insurance to cover obligations imposed by federal and state statutes having jurisdiction of Subrecipient's employees engaged in the performance of the work or services under this Agreement; and Employer's Liability insurance of not less than \$1,000,000 for each accident, \$1,000,000 disease for each employee, and \$1,000,000 disease policy limit.
 - b. Subrecipient waives all rights against County and its agents, officers, directors and employees for recovery of damages to the extent these damages are covered by the Workers' Compensation and Employer's Liability or commercial umbrella liability insurance obtained by Subrecipient pursuant to this Agreement.
 13. Sexual Molestation And Physical Abuse:
 - a. When services involve working with these groups of individuals, the insurance requirements in the Agreement need to be revised to include coverage for "sexual molestation and physical abuse". Coverage for this type of claim, or allegation, is excluded from standard general liability policies. Therefore, Subrecipient whose services include working with and/or caring for children/elderly and disabled persons should have their policies specifically endorsed to include this coverage.
 14. Commercial General Liability – Occurrence Form:

Policy shall include bodily injury, property damage and broad form contractual liability coverage.

15. The policy shall be endorsed to include coverage for physical/sexual abuse and molestation.
16. The policy shall be endorsed to include the following additional insured language: "Maricopa County, its subsidiary, parent, associated and/or affiliated entities, successors, or assigns, its elected officials, trustees, employees, agents, and volunteers shall be named as additional insureds with respect to liability arising out of the activities performed by, or on behalf of the Subrecipient".
Minimum Limits:

General Aggregate	\$4,000,000
Each Occurrence Limit	\$2,000,000
Sexual Abuse/Molestation	\$2,000,000
17. Builder's Risk (Property) Insurance.
 Subrecipient shall purchase and maintain, on a replacement cost basis, Builders' Risk insurance and, if necessary, Commercial Umbrella insurance in the amount of the initial Agreement amount as well as subsequent modifications thereto for the entire work at the site. Such Builders' Risk insurance shall be maintained until final payment has been made or until no person or entity other than County has an insurable interest in the property required to be covered, whichever is earlier. This insurance shall include interests of County, Subrecipient and all of Subrecipient's subcontractors and sub-subcontractors in the work during the life of the Agreement and course of construction, and shall continue until the work is completed and accepted by County. For new construction projects, Subrecipient agrees to assume full responsibility for loss or damage to the work being performed and to the structures under construction. For renovation construction projects, Subrecipient agrees to assume responsibility for loss or damage to the work being performed at least up to the full Agreement amount, unless otherwise required by the Agreement documents or amendments thereto.
 - a. Builders' Risk insurance shall be on a special form and shall also cover false work and temporary buildings and shall insure against risk of direct physical loss or damage from external causes including debris removal, demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for architect's service and expenses required as a result of such insured loss and other "soft costs" as required by the Agreement.
 - b. Builders' Risk insurance must provide coverage from the time any covered property comes under the Subrecipient's control and/or responsibility, and continue without interruption during construction, renovation, or installation, including any time during which the covered property is being transported to the construction installation site, and while on the construction or installation site awaiting installation. The policy will provide coverage while the covered premises or any part thereof are occupied. Builders' Risk insurance shall be primary and any insurance or self insurance maintained by the County is not contributory.
 - c. If the Agreement requires testing of equipment or other similar operations, at the option of County, Subrecipient will be responsible for providing property insurance for these exposures under a Boiler Machinery insurance policy or the Builders' Risk Insurance policy.
18. Certificates of Insurance:
 - a. Upon Agreement execution, Subrecipient shall furnish the County with valid and complete certificates of insurance or formal endorsements as required by the Agreement, issued by Subrecipient's insurer(s), as evidence that policies providing the required coverage, conditions and limits required by this Agreement are in full force and effect. Such certificates shall identify this Agreement number and title.
 - b. Prior to commencing work or services under this Agreement, Subrecipient shall have insurance in effect as required by the Agreement in the form provided by the County, issued by Subrecipient's insurer(s), as evidence that policies

providing the required coverage, conditions and limits required by this Agreement are in full force and effect. Such certificates shall be made available to the County upon ten (10) business days. BY SIGNING THE AGREEMENT PAGE THE SUBRECIPIENT AGREES TO THIS REQUIREMENT AND FAILURE TO MEET THIS REQUIREMENT WILL RESULT IN CANCELLATION OF AGREEMENT.

- c. In the event any insurance policy(ies) required by this Agreement is (are) written on a "claims made" basis, coverage shall extend for two years past completion and acceptance of Subrecipient's work or services and as evidenced by annual Certificates of Insurance.
 - d. If a policy does expire during the life of the Agreement, a renewal certificate must be sent to County fifteen (15) days prior to the expiration date.
19. Cancellation and Expiration Notice:
- a. Insurance required herein shall not be permitted to expire, be canceled, or materially changed without thirty (30) days prior written notice to the County.
 - b. If the Subrecipient provides professional or semi-professional personal services under this Agreement for which malpractice or professional liability coverage is available, such as medical, psychiatric, or legal services, Subrecipient shall carry minimum liability coverage of \$2,000,000 each occurrence and provide the County with proof of coverage.
20. Subcontractors:
Subrecipient's certificate(s) shall include all subcontractors as insureds under its policies or Subrecipient shall furnish to the County separate certificates for each subcontractor. All coverages for subcontractors shall be subject to them in minimum requirements identified above.
21. Approval:
Any modification or variation from the insurance requirements in any Agreement must have prior approval from the County whose decision shall be final. Such action will not require a formal Agreement amendment, but may be made by administrative action.
22. Exceptions:
In the event the Subrecipient or sub-contractor(s) is/are a public entity, then the Insurance Requirements shall not apply. Such public entity shall provide a Certificate of Self-Insurance.

KK. BONDING

- 1. The Subrecipient shall not receive any initial reimbursements under this Agreement in an amount greater than the Subrecipient's bonding limit. Subrecipient shall provide the Assistant Director with documentation of required bonding.
- 2. Subrecipient shall have fidelity bonding of not less than the maximum amount of cash on hand or an amount equal to the initial reimbursement, whichever is greater.
- 3. Bonding requirements shall prevail throughout the term of this Agreement.

LL. GRIEVANCE PROCEDURE

The Subrecipient shall establish a system through which applicants for, and recipients of, services may present grievances and may take appeals about eligibility and other aspects of the Subrecipient's work under this Agreement. The grievance procedure shall include provisions for notifying the applicants for, and recipients of, services of their eligibility or ineligibility for service and their right to appeal to the County if the grievance is not satisfied at the Subrecipient's level. This system shall include protest procedures for decisions related to contract awards and requests for reasonable accommodations for persons with disabilities.

MM. NONDISCRIMINATION

The Subrecipient, in connection with any service or other activity under this Agreement, shall not in anyway, discriminate against any person on the grounds of race, color, religion, sex, national origin, age,

disability, political affiliation or belief. The Subrecipient shall include this clause in all of its Subcontracts.

NN. EQUAL EMPLOYMENT OPPORTUNITY

The Subrecipient shall not discriminate against any employee or applicant for employment because of race, age, disability, color, religion, sex, sexual identity, gender identity, or national origin. The Subrecipient shall take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to their race, age, disability, color, religion, sex, sexual identity, gender identity or national origin. Such action shall include, but is not limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, lay-off or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The Subrecipient shall, to the extent such provisions apply, comply with Title VI and VII of the Civil Rights Act of 1964, as amended (42 U.S.C. §§ 2000a, et seq.); the Rehabilitation Act of 1973, as amended (29 U.S.C. §§ 701, et seq.); the Age Discrimination in Employment Act of 1967, as amended (29 U.S.C. §§ 621, et seq.); the Americans with Disabilities Act of 1990 (42 U.S.C. §§ 12101, et seq.); and Executive Orders 11375 and 11246 and implementing regulations at 41 CFR part 60, as well as, Arizona Executive Order 99-4, which mandates that all persons shall have equal access to employment opportunities.

OO. DISABILITY REQUIREMENTS

Subrecipient agrees that any electronic or information technology offered under this Agreement shall comply with A.R.S. §§41-2532 and 2533 and Section 508 of the Rehabilitation Act of 1973, which requires that employees and members of the public shall have access to and use of information technology that is comparable to the access and use by employees and members of the public who are not individuals with disabilities.

PP. UNIFORM ADMINISTRATIVE REQUIREMENTS

By entering into this Agreement, the Subrecipient agrees to comply with all applicable provisions of Title 2, Subtitle A, Chapter II, PART 200— UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS contained in Title 2 C.F.R. § 200 et seq.

QQ. FINANCIAL MANAGEMENT

The Subrecipient shall establish and maintain a separate, interest-bearing bank account for money provided under this Agreement, or an accounting system that assures the safeguarding and accountability of all money and assets provided under this Agreement. No part of the money deposited in the bank account shall be commingled with other funds or money belonging to the Subrecipient. All interest earned on the account shall be disposed of in a manner specified by the County in accordance with applicable State and federal regulations. The Subrecipient shall provide a signed bank account agreement authorizing the County to obtain information about the account. If an accounting system is used, it shall be in accord with generally accepted accounting principles.

RR. RETENTION OF RECORDS

1. This provision applies to all financial and programmatic records, supporting document, statistical records and other records of the Subrecipient that are related to this Agreement.
2. The Subrecipient shall retain all records relevant to this Agreement for six (6) years after final payment or until after the resolution of any audit questions which could be more than six (6) years, whichever is longer, and the County, federal and State auditors and any other persons duly authorized by the County shall have full access to, and the right to examine, copy and make use of any and all of the records.

TT. ADEQUACY OF RECORDS

If the Subrecipient's books, records and other documents related to this Agreement are not sufficient to support and document that allowable services were provided to eligible participants, the Subrecipient shall reimburse the County for the services not supported and documented.

UU. COMPETITIVE BID REQUIREMENTS

1. Equipment

If this Agreement is with other than a Public Agency, the Subrecipient shall obtain all equipment to be utilized under this Agreement and purchased with funds provided under this Agreement at the lowest practical cost pursuant to the following competitive bidding system:

- a. Procurements in excess of \$300, but less than \$1,000, require oral price quotations from two or more vendors. The Subrecipient shall keep and maintain a record of the vendors' verbal quotations. The Subrecipient's award shall be made to the lowest bidder meeting specification requirements concerning price, conformity to specifications, and other purchasing factors.
- b. Procurements exceeding an aggregate amount of \$1,000 must be approved by the County. At least three (3) bidders shall be solicited to submit written quotations. The Subrecipient shall solicit written quotations by issuing a Request for Quotation to at least three (3) vendors. The award shall be made to the lowest bidder meeting specification requirements concerning price, conformity to specifications, and other purchasing factors.

2. Supplies

If this Agreement is with other than a Public Agency, the Subrecipient shall obtain all supplies to be utilized under this Agreement and purchased with funds provided under this Agreement at the lowest practical cost and pursuant to a system of written quotes whenever the price is expected to be greater than \$300, unless the Subrecipient obtains the Contract Administrator's prior written approval to purchase supplies by an alternate method.

3. Minority, Women and Small Business Enterprises

The Subrecipient shall take affirmative steps to provide an opportunity for minorities, women, and small businesses to compete in the procurement of equipment and supplies under this Agreement.

4. Bidding Procedures

If the Subrecipient is a Public Agency, the Subrecipient's own bidding procedures shall govern.

5. Funding source requirements relating to competitive bid procedures may supersede any or all subparts of this clause and will be specified in the Special Provisions Section of this Agreement.

VV. PROPERTY

Any property furnished or purchased pursuant to the terms of this Agreement shall be utilized, maintained, repaired and accounted for in accordance with instructions furnished by the County, and shall revert to the County upon termination of this Agreement, unless the County determines otherwise. The costs to repair such property are the responsibility of the Subrecipient within the limits budgeted herein. Repair costs beyond the budgeted amount shall be approved by the County.

WW. IMMIGRATION LAWS AND REGULATIONS

1. Federal Immigration and Nationality Act

- a. The Parties understand and acknowledge the applicability of the Immigration Reform and Control Act of 1986 (IRCA). The Parties agree to comply with the IRCA in performing under this Agreement and to permit the other Party to inspect personnel records to verify such compliance.
- b. By entering into this Agreement, both Parties warrant compliance with the Federal Immigration and Nationality Act (FINA) and all other Federal immigration laws and

regulations related to the immigration status of its employees. Both Parties shall obtain statements from their subcontractors certifying compliance and shall furnish the statements to the Procurement Officer upon request. These warranties shall remain in effect through the term of the Agreement. Both Parties and their subcontractors shall also maintain Employment Eligibility Verification forms (I-9) as required by the U.S. Department of Labor's Immigration and Control Act for all employees performing work under the Agreement. I-9 forms are available for download at USCIS.GOV.

- c. The Parties may request verification of compliance for any employee or subcontractor performing work under the Agreement. Should either Party suspect or find that the other Party or any of its subcontractors are not in compliance, then the Party may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Agreement for default, and suspension and/or debarment of the other Party. All costs necessary to verify compliance are the responsibility of the Subrecipient or its subcontractor.
2. Arizona Law: The Subrecipient warrants that it is in compliance with A.R.S. § 41-4401 (e-verify requirements) and further acknowledges:
- a. That Subrecipient and its Vendors, if any, warrant their compliance with all federal immigration laws and regulations that relate to their employees and their compliance with A.R.S. § 23-214;
 - b. That a breach of a warranty under subsection 2 a above, shall be deemed a material breach of this Agreement and the County may immediately terminate this Agreement without liability;
 - c. That the County and any contracting government entity retains the legal right to inspect the papers and employment records of any Subrecipient or Vendors employee who works on this Agreement to ensure that the Subrecipient or Vendors is complying with the warranty provided under subsection 2 a above and that the Subrecipient agrees to make all papers and employment records of said employee(s) available during normal working hours in order to facilitate such an inspection.

XX. DRUG FREE WORKPLACE ACT

The Subrecipient agrees to comply with the Drug-Free Workplace Act of 1988 (41 U.S.C. §§ 701, et seq.), which requires that the Subrecipient and grantees of federal funds must certify that they will provide drug-free workplaces that comply with federal law. This certification is a precondition to receiving a grant or entering into this Agreement.

YY. GOVERNOR'S EXECUTIVE ORDER NO. 88-26

The Subrecipient is required to use the Arizona Taxonomy of Human Services for reporting and contracting purposes.

ZZ. EMPLOYMENT DISCLAIMER

1. This Agreement is not intended to constitute, create, give rise to, or otherwise recognize a joint venture agreement, partnership, or other formal business association or organization of any kind between the Parties, and the rights and obligations of the Parties shall be only those expressly set forth in this Agreement.
2. The Parties agree that no individual performing under this Agreement on behalf the Subrecipient is to be considered a County employee, and no rights of County civil service, County retirement, or County personnel rules shall accrue to such individuals. The Subrecipient shall have total responsibility for all its salaries, wages, bonuses, retirement, withholdings, workers' compensation, occupational disease compensation, unemployment compensation, other employee benefits, and all taxes and premiums appurtenant thereto concerning such individuals and shall defend and hold the County harmless with respect thereto.

AAA. CERTIFICATION REGARDING DEBARMENT, SUSPENSION INELIGIBILITY AND VOLUNTARY EXCLUSION

The undersigned by signing and submitting this Agreement has the authority to certify the Subrecipient to the terms, representations and/or warrants of this Certification. The Subrecipient, defined as the primary participant in accordance with 45 C.F.R. Part 76, certifies to the best of its knowledge and belief that it and its principals:

1. are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
2. have not within a three-year period preceding this Agreement been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. are not presently indicted or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. have not within a three-year period preceding this Agreement had one or more public transactions (Federal, State, or local) terminated for cause or default.
5. shall immediately notify the County if, at any time during the term of this Agreement, it is debarred, suspended, declared ineligible, or voluntarily excluded from participation. The County may pursue available remedies in the event of such occurrence, including immediate termination of this Agreement.
6. shall not enter into a subcontract or sub-recipient agreement with a person or organization that is debarred, suspended, declared ineligible, or voluntarily excluded from participation. The County may pursue available remedies in the event of such occurrence, including immediate termination of this Agreement.

The Subrecipient shall include without modification this Certification's language, entitled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion - Lower Tier Covered Transactions," with all subgrantees or other contractors; in all lower tier covered transactions and in all solicitations for lower tier covered transactions in accordance with 45 C.F.R. Part 76.

Should the Subrecipient not be able to provide this Certification, an explanation as to why shall be immediately provided to the County, Attention: Housing and Community Development Assistant Director, 234 N. Central Ave., Third Floor, Phoenix, AZ 85004.

BBB. CONTRACTOR EMPLOYEE WHISTLEBLOWER RIGHTS AND REQUIREMENT TO INFORM EMPLOYEES OF WHISTLEBLOWER RIGHTS

1. The Parties agree that this Agreement and employees working on this Agreement will be subject to the whistleblower rights and remedies in the pilot program on Subrecipient employee whistleblower protections established at 41 U.S.C. § 4712 by section 828 of the National Defense Authorization Act for Fiscal Year 2013 (Pub. L. 112-239) and section 3908 of the Federal Acquisition Regulation;
2. Subrecipient shall inform its employees in writing, in the predominant language of the workforce, of employee whistleblower rights and protections under 41 U.S.C. § 4712, as described in section 3908 of the Federal Acquisition Regulation. Documentation of such employee notification must be kept on file by Subrecipient and copies provided to County upon request; and
3. Subrecipient shall insert the substance of this clause, including this paragraph (3), in all subcontracts over the simplified acquisition threshold (\$150,000 as of September 2013).

CCC. ISRAEL BOYCOTT

Per A.R.S. § 35-393, Subrecipient certifies that they are not currently engaged in, and agrees for the duration of the Contract to not engage in, a boycott of Israel.

SECTION II

SPECIAL PROVISIONS



MARICOPA COUNTY

HUMAN SERVICES DEPARTMENT

A. STANDARDS

The Subrecipient shall perform the work and provide the services as identified in the Work Statement and shall immediately notify the County whenever the Subrecipient is unable to, or anticipates an inability to, perform any of the work, or provide any of the services required by the terms of this Agreement. The Subrecipient acknowledges that any inability to perform the work and provide the services, or comply with the standards set forth in this Agreement may subject the Subrecipient to the remedies provided in the Default and Remedies for Noncompliance established by the General Provisions.

B. COMPLIANCE WITH LAWS, RULES & REGULATIONS

This Agreement and the Parties hereto, are subject to all applicable federal, state, or local laws, rules, and regulations. The Subrecipient shall comply with all applicable laws, rules and regulations, without limitation to those designated within this Agreement. Refer to the Default and Remedies for Noncompliance provided in the General Provisions.

C. COMPLIANCE WITH REQUIREMENTS REGARDING ELIGIBILITY FOR PUBLIC BENEFITS

Subrecipient shall comply with State and other laws regarding eligibility for public benefits including ARS § 1-501 and § 1-502 which states that public benefits shall only be provided to eligible applicants who are citizens of the United States, or are Qualified Non-Citizens:

1. All applicants authorized to receive public benefits must provide documentation of their lawful presence in the United States through a verification process.
2. All eligible applicants must also execute a sworn affidavit stating that the documentation provided during the verification process to prove citizenship or qualified non-citizen is true.
3. The Affidavit Demonstrating Lawful Presence in the United States or similar form shall be used to document compliance with requirements 1 and 2, above.
4. Employees of Maricopa County and its subcontracted entities are required to report "discovered violations" of federal immigration law
5. Public benefits are defined in ARS 1-501 as any grant, contract, loan, professional license, or commercial license provided by an agency of the United States or by appropriated funds of the United States; and any retirement, welfare, health, disability, public or assisted housing, postsecondary education, food assistance, unemployment benefit, or any other similar benefit for which payments or assistance are provided to an individual, household, or family eligibility unit by an agency of the United States or by appropriated funds of the United States.
6. Programs, services, or assistance such as soup kitchens, crisis counseling and intervention, and short-term shelter which meet the following conditions are exempt from ARS 1-501 and 1-502.
 - a. deliver in-kind services at the community level, including through public or private nonprofit agencies;
 - b. do not condition the provision of assistance, the amount of assistance provided, or the cost of assistance provided on the individual recipient's income or resources; and
 - c. are necessary for the protection of life or safety.

D. AUDIT REQUIREMENTS

The Subrecipient shall, at its own expense, file with the County by March 31st of each Agreement year, either audited financial statements prepared in accordance with federal single audit requirements; or, financial statements of the HOME program prepared in accordance with generally accepted accounting principles audited by an independent certified public accountant.

E. SPECIAL FEDERAL AND PROJECT PROVISIONS

1. In accordance with HOME Program regulations, the Subrecipient agrees to implement the Program fully as described in each Work Statement in accordance with the terms of the Five-Year Consolidated Plan and the Annual Action Plan submitted by the County to HUD for funds to carry out the Program and the Certifications which were submitted concurrently with the Annual Action Plan to HUD, and with any Cooperation Agreements with the Municipality (as applicable). The Annual Action Plan is hereby incorporated by reference into this Agreement. In summary, the Program is described in Work Statement, Section III. The Subrecipient shall be responsible to provide various reports of all activities related to the Work Statement. The Subrecipient agrees to submit to the County required reports:
 - a. Program Income Reports are due monthly with supporting documentation and with each Request for Reimbursement.
 - b. Quarterly Performance Reports are due on the 15th of July, October, January and April of the preceding three months (i.e. July report covers the months of April, May and June). Reports shall address all programs described in the Work Statement. Failure to submit timely Performance Reports will result in suspension of payment reimbursement requests until all reports are brought current. Performance Reports are continually due for rental projects to ensure that all beneficiary data is regularly updated with beneficiary information during lease-up along with vacant unit reports. Within six months from the date of project completion, if a rental unit remains unoccupied, the Subrecipient must provide the County information about current marketing efforts and, if appropriate, an enhanced plan for marketing the unit so that it is leased as quickly as possible. Within 18 months from the date of project completion, if efforts to market the unit are unsuccessful and the unit is not occupied by an eligible tenant, HUD will require repayment of all HOME funds invested in the unit. A unit that has not served a low- or very low-income household has not met the purposes of the HOME program. Therefore, the costs associated with the unit are ineligible. This tracking provides the County with early notice of any units at risk of going unrented as described in §92.252.
 - c. Monthly Request for Reimbursements Subrecipient must use the required Monthly Request for Reimbursement form and must include all supporting documentation, a Match Log, Monthly Summary of Program Income/Recaptured Funds Report, and supporting documentation;
 - d. HOME Setup Reports are due within one (1) year from the date this Agreement is fully executed. According to 92.250 (b): Before Setup Reports are submitted, the Subrecipient must evaluate the project in accordance with guidelines that it has adopted for determining a reasonable level of profit or return on owner's or developer's investment in a project and must not commit or invest any more HOME funds, alone or in combination with other governmental assistance, than is necessary to provide quality affordable housing that is financially viable for a reasonable period (at a minimum, the period of affordability in 24 CFR 92.252 and 254) and that will not provide a profit or return on the owner's or developer's investment that exceeds the Subrecipient's established standards for the size, type and complexity of the project.
 - e. HOME Completion Reports are due no later than sixty (60) days after final payment is requested. HOME Completion Reports must include all required documents as described in this Agreement. Within ten (10) business days of receiving the HOME Completion Report, the County will enter project completion into the HUD Exchange Integrated Disbursement and Information System (IDIS). The date the HOME Completion Report is entered into IDIS is the date the affordability period commences for each activity.

- f. Initial Request for Reimbursement form with required documentation for each activity is due within 45 (forty-five) days of submitting a HOME Setup Report and no later than 90 (ninety) days thereafter. After the initial request for reimbursement, subsequent requests shall be submitted monthly until project is completed.
- g. Other HUD-required reporting data as applicable.

F. PROGRAM INCOME

1. Means all gross income received by the Subrecipient directly generated from the use of funds provided by this Agreement or matching contributions. Program income must be used in accordance with the requirements of 24 CFR 92.503. When program income is generated by housing that is only partially assisted with HOME funds or matching funds, the income shall be prorated to reflect the percentage of HOME funds used. Program income may be retained and used by the Subrecipient under the following conditions: submit to the County with documentation supporting the amount of program income received and expended. Monthly Summary Program Income Reports are due to the County by the 15th day of the following month (i.e. due on August 15th for the month of July).
2. Program income derived from Maricopa HOME Consortium activities undertaken by a Subrecipient which thereafter terminates its participation in the consortium continues to be program income of the consortium and must be returned to the County.
3. Program Income includes, but is not limited to: [1] proceeds from the disposition by sale or long-term lease of real property acquired, rehabilitated or constructed with HOME funds or matching contributions; [2] gross income from the use or rental of real property, owned by the Subrecipient that was acquired, rehabilitated, or constructed, with HOME funds or matching contributions, less cost incidental to generation of the income (program income does not include gross income from the use, rental or sale of real property received by the project owner, developer, or sponsor, unless the funds are paid by the project owner, developer, or sponsor to the participating jurisdiction, subrecipient or State recipient); [3] payments of principal and interest on loans made using HOME funds or matching contributions; [4] Proceeds from the sale of loans made with HOME funds or matching contributions; [5] Proceeds from the sale of obligations secured by loans made with HOME funds or matching contributions; [6] Interest earned on program income pending its disposition; and [7] Any other interest or return on the investment permitted under 24 CFR 92.205 (b) of HOME funds or matching contributions.
4. Program Income received by the Subrecipient shall be tracked by the Subrecipient and accounted for in a separate fund or account and reported monthly to the County in the required format. Program Income that is received after the end of this Agreement shall be sent to the County in accordance with 24 CFR § 92.503 within 30 days after the expiration of this Agreement.

G. RECAPTURED FUNDS

1. Recaptured funds are HOME funds which are recouped by the Subrecipient when HOME assisted homeownership housing does not continue to be the principal residence of the assisted homebuyer for the full affordability period required by 24 CFR 92.254 (a) (4). The amount of the recapture is determined by the recapture requirements established by the Subrecipient in accordance with 24 CFR 92.254 (a) (5) (ii). In accordance with 24 CFR 92.503 (c), recaptured funds must be deposited in a separate account and have support back-up evidencing recaptured funds.
2. Recaptured funds must be used for eligible HOME activities in accordance with the requirements of the HOME statute and regulations, in the same manner as program income must be used. However, unlike program income, since recaptured funds represent a return of the original HOME investment, 10% of the recaptured funds may not be used for eligible administrative and planning costs. The Subrecipient must enforce the recapture agreements

and account for the source and application of recaptured funds, in accordance with the record keeping requirements of 24 CFR 92.508. Recaptured funds may be retained and used by the Subrecipient under the following conditions: submit to the County documentation supporting the amount of recaptured funds received and expended. Monthly Summary of Recaptured Fund Reports which are due to the County by the 15th day of the following month (i.e. due on August 15th for the month of July).

3. Recaptured funds received from Maricopa HOME Consortium activities undertaken by the Subrecipient which thereafter terminates its participation in the consortium must be returned to the County.

H. REAL PROPERTY ACQUIRED OR IMPROVED WITH HOME FUNDS

Upon expiration of this Agreement, any real property under the Subrecipient control that was acquired or improved in whole or in part with HOME funds must be occupied by low and/or very low income households and in compliance with HOME occupancy limits and must meet the requirements to qualify as affordable housing subject to encumbrances and obligations described in any applicable recorded covenants running with the land. The option to use deed restrictions or covenants running with the land must include period of affordability set forth in §92.252 and §92.254.

I. DEOBLIGATION

The County may reduce funds from the funding award evidenced by this Agreement, under the following circumstances:

1. The Subrecipient completes performance under the Work Statement without using all funds provided by the County under this Agreement;
2. This Agreement expires all funds are expended;
3. The County's original allocation was a ban and the Subrecipient paid the ban;
4. Cancelled or changed a Program required under the Work Statement for reasons other than non-performance;
5. This Agreement has otherwise been terminated. The County may de-obligate funds under this Agreement under the foregoing circumstances upon written notice to the Subrecipient.

J. REDUCTION IN FUNDS

The County may reduce funds from the amount of the funding award evidenced by this Agreement, under the following circumstances: 1) The County determines that the Subrecipient failed to use the funds provided by the County under this Agreement in compliance with the terms and conditions outlined herein; or 2) the Subrecipient fails to perform in accordance with the performance obligations set forth in the Statement of Work and Project Schedule or the terms of this Agreement. The County may reduce funds under this Agreement under the foregoing circumstance upon written notice to the Subrecipient.

K. REPAYMENT OF FUNDS

Subrecipient agrees to repay funds provided under this Agreement in compliance with the terms of this Agreement or the requirement of applicable laws and regulations. This repayment obligation extends to but is not limited to questioned costs identified in HUD monitoring or Single Audit and repayments required by HUD for failed projects during the period of affordability for projects financed under this agreement. The County may specify in writing, the terms of the repayment or alternative terms in lieu of repayment however in no case shall repayment or alternative terms be accomplished later than one hundred eighty (180) days following the written determination of noncompliance by the County.

L. FUNDS REMAINING AT EXPIRATION

Upon expiration of the Agreement, the Subrecipient shall transfer to the County any unexpended funds advanced to the Subrecipient by the County under this Agreement.

M. ADMINISTRATIVE REQUIREMENTS

In accordance with federal regulations, including 24 CFR § 92 et seq., the County is responsible for ensuring the administration of HOME Program Funds in accordance with all program requirements.

1. FINANCIAL RECORDS: Subrecipient accounting system and financial records shall comply with the applicable requirements and standards of 24 CFR 200 et seq. Such systems shall be subject to monitoring from time to time by the County or by HUD.

- a. The Subrecipient agrees to adhere to accounting principles and procedures, to utilize adequate internal controls and maintain necessary source documentation for all costs incurred. The Subrecipient further agrees to maintain an adequate accounting system that provides for appropriate grant accounting (including calculation of program income).
- b. Subrecipient is to adhere to applicable audit requirements as described and in accordance with 24 CFR 200 et seq. In addition, all Subrecipients must provide annual single-audit reports or annual audited financial statements to the County.
- c. Subrecipient is to adhere to the repayment of investment requirements set forth in 24 CFR § 92.503. Any HOME Funds invested in housing that does not meet the affordability requirements for the period specified in § 92.252 or § 92.254, as applicable, must be repaid in accordance with 24 CFR § 92.503 (b)(3).

2. DOCUMENTATION AND RECORD KEEPING:

- a. Records to be Maintained – The Subrecipient shall maintain all records required by the Federal regulations specified in 24 CFR § 92.508 that are pertinent to the activities to be funded under this Agreement. Such records shall include but not be limited to records:
 - i. Demonstrating that the Subrecipient is and remains a qualified Subrecipient;
 - ii. Providing a full description of each project undertaken and its impact;
 - iii. Required determining the eligibility of activities;
 - iv. Demonstrating compliance with environmental review requirements;
 - v. Required to document the acquisition, improvement, use or disposition of real property acquired or improved with HOME assistance (Properties retained shall continue to meet eligibility criteria);
 - vi. Demonstrating citizen participation;
 - vii. Demonstrating compliance regarding acquisitions, displacement, relocation and replacement housing;
 - viii. Demonstrating continuing compliance for all activities and/or compliance with resale or recapture provisions of the affordability standards;
 - ix. Documenting compliance with the fair housing and equal opportunity components of the HOME program;
 - x. Financial records as required by 24 CFR Part 570.502, 24 CFR 200 et seq. and OMB Circulars;
 - xi. Other records necessary to document compliance with HOME requirements;
 - xii. Documenting compliance with Section 3 of the Housing Development Act of 1968;
 - xiii. Demonstrating compliance with deeds of trust, promissory notes, and forgivable loans associated with owner-occupied housing activities;
 - xiv. Supporting that the Subrecipient has maintained client data demonstrating clients served meet the income and other criteria required by federal law

and that no unlawful discrimination occurs in the solicitation or selection process of low income persons or groups and that no conflict of interest exists.

- xv. Demonstrating compliance with applicable Federal, State and local laws and regulations, including compliance with ARS § 1-501 and § 1-502 (Attachment A).
- b. Outcome Measures – The Subrecipient shall maintain data that supports the accomplishment of the desired outcomes as indicated in the Work Statement.
- c. Disclosure – The Subrecipient understands that client information collected under this Agreement is private and the use or disclosure of such information, when not directly connected with the administration of the County's or Subrecipient's responsibilities with respect to services provided under this Agreement is prohibited unless written consent is obtained from such person receiving service.
- d. Program Activity Reports – Such reports as required by the County including, but not limited to HOME Setup/Completion Report, Quarterly Performance Reports, Program Income/Recaptured Funds Reports, Match Reports, MBE/WBE information, and other HUD-required reporting data as applicable shall be submitted in accordance with the Current Practices Manual at the completion of each Program which is described under the Work Statement.
- e. Audits and Inspections – All Subrecipient records with respect to any matters covered by this Agreement shall be made available to the County, their designees or the Federal Government, at any time during normal business hours, as often as the County deems necessary, to audit, examine and make excerpts or transcripts of all relevant data. Any relevant deficiencies noted in audit reports must be addressed by the Subrecipient within 45 days after receipt by the Subrecipient. Failure of the Subrecipient to comply with the above audit requirements shall constitute a violation of this Agreement and may result in the withholding of future payments. The Subrecipient hereby agrees to have an Annual Audit conducted in accordance with Current Practices Manual concerning Subrecipient audits. The Annual Audit requirement is applicable to all levels of funding received by Subrecipient via this Agreement, even if the level of funding is less than the current thresholds cited in 2 CFR 200.501.
- f. Performance Monitoring – The County shall monitor the Subrecipient to determine if HOME-funded activities are implemented and administered in accordance with all applicable federal requirements and gauge performance of the Subrecipient against goals and performance standards required herein. Subrecipient will prepare for monitoring and assure all required files and documentation are available at scheduled monitoring, and as set forth in the HOME Consortium Monitoring Current Practices. Failure of Subrecipient to administer, implement and perform as determined by federal regulations and County shall constitute non-compliance with this Agreement. Non-compliance is a violation of this Agreement and may result in the withholding of future payments.
- g. Policy/Administrative Manuals Use – Subrecipient agrees to be familiar with and comply with the policies/procedures established in the most recent Current Practices Manual. Noncompliance with the Current Practices Manual shall constitute a breach of Agreement.

N. ENVIRONMENTAL REVIEW CONDITIONS

Completion of the Environmental Review Record (ERR) is mandatory before taking any physical action on a site or entering into choice limiting contracts. Only exempt activities such as administration may be taken and reimbursed by the County prior to receiving a written release of HOME funds to the Subrecipient. Exempt activities described in § 24 CFR 58.34 (a) (1)-(11) are

activities that generally have no physical impact on the environment. If federal funds are involved in an activity, neither federal nor non-federal funds may be expended or committed by contract (conditional or not) for property acquisition, rehabilitation, conversion, lease, repair or construction activities, until HUD and/or the County provides written authorization based on approval of an ERR.

An option agreement (to purchase land or a single family residence) on a proposed site or property is allowable prior to the completion of the environmental review if the option agreement is contingent upon a HUD authorization to use funds based on a completion ERR. The cost of the option must be a nominal portion of the purchase price.

1. The Subrecipient agrees to comply with: the National Environmental Policy Act of 1969 (P.L. 91-190) pursuant thereto 40 CFR Parts 1500 – 1508; Environmental Review Procedures for Entities Assuming HUD Environmental Responsibilities pursuant thereto Title 24 CFR Part 58, Subpart A; CPD Notice 01-11 HOME Environmental Review Requirements and with all conditions required in the process of the environmental assessment.
 - a. Air and Water – The Subrecipient agrees to comply with the following requirements insofar as they apply to the performance of this Agreement.
 - i. Clean Air Act, 42 USC § 7401, et seq., as amended.
 - ii. Federal Water Pollution Control Act, as amended, 33 USC § 1251, et seq., as amended, 1318 relating to inspection, monitoring, entry, reports and information, as well as other requirements specified in said Section 114 and Section 308 and all regulations and guidelines issued thereunder.
 - iii. Environmental Protection Agency (EPA) regulations pursuant to 40 CFR Part 50, as amended.
 - iv. Subrecipient agrees to comply with conditions set forth by the Air Quality Department or other County agency, as required.
 - b. Flood Disaster Protection – In accordance with the requirements of the Flood Disaster Protection Act of 1973 (42 USC § 4001), the Subrecipient shall assure that for activities located in an area identified by FEMA as having special flood hazards, flood insurance under the National Flood Insurance Program is obtained and maintained as a condition of financial assistance for acquisition or construction purposes. The homeowner must obtain and maintain flood insurance as a condition of funding, or funds may not be utilized.
 - c. Historic Preservation – The Subrecipient agrees to comply with the Historic Preservation requirements set forth in the National Historic Preservation Act of 1966, as amended (16 USC § 470) and the procedures set forth in 36 CFR Part 800, Advisory Council on Historic Preservation Procedures for Protection of Historic Properties, insofar as they apply to the performance of this Agreement. In general, this requires concurrence from the State Historic Preservation Office for all rehabilitation and demolition of historic properties that are fifty (50) years old or older or that is listed or eligible for the National Register of Historic places, or included on any state or local historic property inventory or any archaeological findings.
 - d. Release of Funds (ROF) – No funds may be encumbered prior to the completion of the Environmental Review. The Environmental Review Record (ERR) must be completed before any funds are obligated. Funding is also conditioned upon the completion of the ERR of every activity site by address. The responsibility for certifying the appropriate ERR and ROF shall rest with the County. It is the responsibility of the Subrecipient to notify the County, and to refrain from making any commitments and expenditures on a site until a Release of Funds has been issued by the County. Failure to meet these conditions will mean that requested funds will not be disbursed.

O. THE SUBRECIPIENT CERTIFIES

1. That it is a municipality that meets the applicable requirements of the HOME Program.
2. That it possesses legal authority to execute this Agreement.
3. That its governing body has duly adopted or passed as an official act, a resolution, motion, or similar action authorizing the person identified as the official representative of the Subrecipient to execute this Agreement and to comply with the terms of this Agreement.
4. That the activity described shall be carried out and services administered in compliance with all federal laws and regulations as follows:
 - a. Subrecipients that are governmental entities (including public agencies) shall comply with the requirements and standards of 24 CFR 200, et seq.

P. ADDITIONAL CERTIFICATIONS, WARRANTIES, AND AGREEMENTS

1. The Parties to this Agreement agree that they will utilize and make available the HOME funds in conformity with the non-discrimination and equal opportunity requirements set out in the HUD regulations in the National Housing Affordability Act. These regulations listed in 24 CFR §§ 92.350-92.454 include:
 - a. The requirements of the Fair Housing Act, 42 CFR §§ 3601-20, and implementing regulations at 24 CFR Part 100: Executive Order 11063 (Equal Opportunity in Housing) as amended by Executive Order 12259 (3 CFR, 1958-1963 Comp., p. 652 and 3 CFR 1980 Comp., p. 307) and implementing regulations at 24 CFR §107; and Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d, and implementing regulations at 24 CFR Part 1 (Non-discrimination in Federally Assisted Programs);
 - b. Executive Order 13166 entitled "Improving Access to Services for Persons with Limited English Proficiency" pursuant to Title VI of the Civil Rights Act;
 - c. The prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975 (42 U.S.C. §§ 6101-07) and the regulations at 24 CFR § 146;
 - d. The prohibitions against discrimination on the basis of handicap under Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794) and implementing regulations at 24 CFR Part 8; and, Americans with Disabilities Act 1990;
 - e. The requirements of the Executive Order 11246 (Equal Employment Opportunity) and the regulations issued under the Order at 41 CFR Chapter 60 (3 CFR §§ 1964-65, Comp., p. 339);
 - f. The requirements of Section 3 of the Housing and Urban Development Act of 1968, 12 U.S.C. § 1702u (Employment Opportunities for Business and Lower Income Persons in Connection with Assisted Activities); and
 - g. The requirements of Executive Orders 11625 and 12432 regarding Minority Business Enterprise, and 12138 regarding Women's Business Enterprise, and Regulations S. 85.36 (e) and of Section 281 of the National Housing Affordability Act.
 - h. The requirements of the Housing and Urban Development Equal Access Rule (24 CFR Part 5 Final Rule 5863) to ensure equal access to housing and services regardless of gender identity.
2. The Parties to this Agreement agree that they will prepare and adopt acceptable procedures and requirements for affirmatively marketing units in the HOME Activities, when HOME assisted housing contains 5 or more rental units, by providing information about the availability of HOME-assisted units that are vacant at the time of completion or that later become vacant. The Parties agree that they will make good faith efforts to provide information and to otherwise attract eligible persons from all racial, ethnic, and gender groups in the housing market to the available housing during the period of affordability. These procedures and requirements are not applicable when units are occupied by families

- referred from a Public Housing Authority's (PHA) waiting list, or to families receiving tenant-based rental assistance provided from HOME funds.
3. HOME funds may not be used for operations or modernization of public housing projects financed under the Housing Act of 1937.
 4. County, as the participating jurisdiction, assumes all the responsibilities for environmental review, decision making, and action under the National Environmental Policy Act of 1969 (42 U.S.C. § 4321) and the other provisions of the law that would apply to HUD were HUD to undertake such Activities as Federal Activities in accordance with 24 CFR Part 58. The County will assume the responsibilities for the Request for Release of Funds. The Subrecipient agrees not to commit or incur expenditures for HOME activities until this environmental review process has been completed. Should it be determined that the Subrecipient has incurred expenses in violation of the NEPA requirements, the Subrecipient will be responsible for the full costs for such expenditures and repayment of any related reimbursements. The Subrecipient agrees to provide all necessary assistance to the County in completing this environmental review process.
 5. The Parties to this Agreement agree to abide with the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA) (42 U.S.C. §§ 4291-4655) and the governmental implementing regulations at 49 CFR Part 24 as they apply to this HOME Program.
 6. The Parties to this Agreement agree to abide with the Davis-Bacon Act (40 U.S.C. § 276a-5) and the Agreement Work Hours and Safety Standards Act (40 U.S.C. §§ 327-333).
 7. The Parties to this Agreement agree to abide by the Federal Disaster Protection Act of 1973 (42 U.S.C. §§ 4001-4128) as they apply to this HOME Program.
 8. The Parties to this Agreement agree to abide by the Drug-Free Workplace Act of 1988 as it applies to the HOME Program.
 9. Housing assisted with HOME funds constitutes HUD-assisted housing for the purposes of the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. § 4821, et seq.) and is therefore subject to 24 CFR Part 35.
 10. No person who is an employee, agent, consultant, officer or elected official, or appointed official who exercise or have exercised any functions or responsibilities with respect to activities assisted with HOME funds or who are in a position in a decision making process or gain inside information with regard to these activities, may obtain a financial interest or benefit from a HOME assisted activity, either for themselves or those whom they have family or business ties, during their tenure or for one year thereafter.
 11. The Subrecipient warrants that it is in compliance with A.R.S. § 41-4401 and further acknowledges
 - a. That the Subrecipient and its subcontractors/vendors, if any, warrant their compliance with all federal immigration laws and regulations that relate to their employees and their compliance with A.R.S. § 23-214 (A);
 - b. That a breach of a warranty under subsection a above, shall be deemed a material breach of the Agreement that is subject to penalties up to and including termination of the contract;
 - c. That the County retains the legal right to inspect the employment papers of any Subrecipient or vendor's employee who works on the Agreement to ensure that the Subrecipient or vendor is complying with the warranty provided under subsection a above and that the Subrecipient agrees to make all papers and employment records of said employee(s) available during normal working hours in order to facilitate such an inspection; and
 12. That nothing herein shall make any Subrecipient, or vendor an agent or employee of the County.
 13. That the Current Practices Manual shall be made accessible to all applicable Subrecipient staff.

Q . REGARDING SUBCONTRACTS AND VENDORS

1. Approvals – Unless expressly authorized in the written Agreement by the Subrecipient exempt activities such as architectural, engineering and administration may be undertaken and reimbursed by the County prior to receipt of HUD Request Release of Funds (RROF). Exempt activities described in 24 CFR 58.34 (1)(1)-(11) are activities that generally have no physical impact on the environment. Otherwise the Subrecipient shall not expend or commit federal or non-federal funds by contract (conditional or not) for property acquisition, rehabilitation, conversion, lease, repair or construction activities, until HUD has provided written authorization based on approved ERR. Any pre-Agreement costs entered into by a subcontract(s) with any agency or individual in the performance of this Program that are not exempt activities without the Release of Funds (ROF) from the County prior to the execution of such Agreement.
2. DUNS Number – All subcontractors shall have a valid DUNS number and an active profile in the federal System for Award Management, or SAM.
3. Fees – Subrecipient and all subcontractors under this Agreement shall not charge servicing, origination, or other fees for the costs of administering the HOME program, except as permitted by 24 CFR 92.214 (b) (1).
4. Selection Process – The Subrecipient shall ensure that all subcontracts let in the performance of this Agreement are awarded on a fair and open competitive basis. Executed copies of all subcontracts shall be forwarded to the County along with documentation, if requested concerning the selection process.
5. Section 3 of the Housing and Urban Development Act of 1968 – The Subrecipient shall include the Section 3 clause in every subcontract and shall take appropriate action pursuant to the subcontract upon a finding that the vendor is in violation of regulations issued by the grantor agency. The Subrecipient shall not subcontract with any entity where it has notice or knowledge that the latter has been found in violation of regulations under 24 CFR § 135. The Subrecipient has the responsibility of determining Section 3 eligibility.
6. Monitoring – The Subrecipient shall monitor/review all subcontracted services on an annual basis to assure Agreement compliance. Results of monitoring efforts shall be summarized in Contract Performance Reports and supported with documented evidence, if requested, of follow-up actions taken to correct areas of noncompliance.

R . THE COUNTY CERTIFIES

1. That the public purpose is served by the financial participation of the County in the Statement of Work.
2. That the HOME Program funds designated for the Statement of Work constitutes reasonable and prudent assistance necessary for completion of the Program.

S . PROGRAM COMPLETION

Upon completion of the Work Statements, all unspent HOME resources shall be forfeited to the County for reallocation as defined by Maricopa HOME Consortium Policies and Procedures. The Subrecipient shall continue to be responsible for compliance activities until all HOME requirements and contractual obligations are met including affordability restrictions. The Subrecipient obligation shall not end until all close-out requirements are completed. The County will notify the Subrecipient in writing that a Completion Report is due to the County within sixty (60) days of one of the following occurrences:

1. Funds have been expended for the activity;
2. The Work Statement has been completed;
3. The Agreement period set forth in this Agreement has expired; or
4. The Agreement has otherwise been terminated.

Following the receipt and approval of the Completion Report for each activity, the County will notify the Subrecipient in writing that each activity is closed. In compliance with 24 CFR 92.502 (d) all

project completion data shall be entered in the HUD Exchange Integrated Disbursement and Information System (IDIS) within 120 days of the final drawdown for all activity types. The County shall provide the Subrecipient with notice of the same upon entering all project completion data in IDIS. Project completion means projects have all necessary title transfer and construction work completed, projects comply with HOME requirements including property standards set forth at 24 CFR 92.251, the final draw has been disbursed; and the project completion data entered into IDIS.

For the purposes of rental project, the project is complete when construction is complete and the units are ready for occupancy. The identification of a beneficiary is not required for project completion. Vacant rental units may be marked as vacant when completion data is entered.

T. FAILURE TO MAKE PROGRESS

1. Failure of the Subrecipient to make progress according to the Work Statement may result in Agreement termination, deobligation of funds or recapture of funds. Subrecipient agrees to meet with the County at the site in which the funded activity is taking place to discuss progress and allow the County to provide technical assistance if:
 - a. The Subrecipient fails to complete its Environmental Review pursuant to section 9 within one hundred and eighty (180) calendar days from the date the County executes this Agreement;
 - b. The Subrecipient fails to commit funds to a specific local project in performance of and in accordance with the terms of this Agreement within twelve (12) months from the execution date the County executes this Agreement. Commit for the purposes of this paragraph shall have the same meaning as 24 CFR 92.2 (2) (i)-(iii);
 - c. The Subrecipient fails to expend HOME funds in performance of and in accordance with the terms of this Agreement within twenty-four (24) months from the date the County executes this Agreement.
2. The County will terminate any Agreement and recapture funds from the same Agreement in which the Subrecipient does not timely perform the activities described above or in the milestones in the Statement of Work of this Agreement. The County in its sole discretion may forgo providing technical assistance and recapture funds as outlined in this Agreement under Section I hereof and/or terminate the Agreement for cause pursuant to Section I of this Agreement.
3. In the event that a project is not completed within two years from the date that the County executes this agreement, the Subrecipient must repay the HOME funds unless the Subrecipient requests and the Consortium grants an amendment to the Agreement prior to ninety (90) days of Agreement expiration.

U. GENERAL CONDITIONS

1. It is expressly understood by the parties hereto that this Agreement has been negotiated and executed in anticipation of receipt of funds by the County from HUD pursuant to the HOME Program and that therefore, the terms, conditions and sums payable under this Agreement are subject to any changes or limitations which may be required by HUD and the HOME Program regulations. Notwithstanding any other provisions of this Agreement, any payment to Subrecipient by County under this Agreement is contingent upon the actual receipt of funds from HUD.
2. Both parties acknowledge that no member of the governing body, nor any employee of the County who exercises any functions or responsibilities in connection with the carrying out of the activity to which this Agreement pertains, has any personal interest direct or indirect in this Agreement.
3. The County may amend this Agreement at any time provided that such amendments make specific reference to this Agreement and are executed in writing, signed by a duly authorized representative of both organizations and in compliance with the procedures in the Current

Practices Manual. Such amendments shall not invalidate this Agreement nor relieve or release the County or Subrecipient from its obligations under this Agreement. Amendments shall be filed with the original Agreement.

4. Changes – The County may, at any time, by written Change Order/Administrative Change executed by the Human Services Director, make changes within the general scope of this Agreement in any one or more of the following areas:
 - a. Work Statement activities which :
 - i. Do not increase or decrease the amount of total Agreement funding;
 - ii. Modify the project timeline as long as the last day of the project timeline is within the end date of the Agreement; or
 - iii. Modify terms consistent with any change to the Work Statement required by Federal, State, or County regulations, ordinances or policies.
 - b. Administrative requirements such as changes in reporting periods, frequency of reports, or report formats required by HUD or local regulations, policies or requirements. It is the responsibility of the Subrecipient to ensure the latest documents are consulted and followed.
 - c. The County may increase or decrease funding resulting from a reallocation pursuant to a majority vote of the Consortium members with the agreement of both parties; provided the change in funding is approved by an Amendment as referenced in Section I paragraph D.
5. The invalidity in whole or in part of any provision of this Agreement shall not void or affect the validity of any other provision of this Agreement.
6. Subrecipient agrees to be familiar with, update as necessary, and comply with the policies/procedures established in the most recent HOME Consortium Current Practices Manual and all provisions in the most recent Current Practices Manual. Non-compliance with the HOME Consortium Current Practices Manual shall constitute a breach of Agreement.
7. Subrecipient agrees to give all notices and comply with all laws, ordinances, and rules, building codes, regulations and lawful orders of any public authority bearing on the performance of activities pursuant to this Agreement. If the Subrecipient observes that any of the Agreement documents are in conflict with any laws, statutes, building codes and/or regulations, it shall promptly notify the County, in writing, and any necessary changes shall be accomplished by appropriate written modification.
8. Should the Subrecipient perform any work knowing it to be contrary to applicable laws, ordinances, rules, building codes and/or regulations, it shall assume full responsibility, therefore, and shall bear all cost incurred due to its negligence. Any dispute not disposed of by mutual agreement by the parties hereto shall be decided in accordance with the applicable Arizona laws, ordinances, and codes of the state and local governments.
9. Acknowledge the contribution of the County HOME Program in all published literature, brochures, programs, flyers, etc., during the term of the Agreement.
10. Execute and abide by Certifications mandated by HOME Program requirements as listed in HOME Certifications.

V. REVERSION OF ASSETS

Upon expiration of this Agreement, the Subrecipient must transfer to the County any HOME funds on hand at the time of expiration and any accounts receivable attributable to the use of HOME funds. Unexpended funds must be deobligated and returned to the County for reallocation. At the expiration of this Agreement, the County, upon recommendation of the Maricopa HOME Consortium staff, may reallocate any unencumbered funds per the Consortium reallocation policy, as stated in the Maricopa HOME Consortium Intergovernmental Agreement -Three Year Cooperative Agreement. A written letter to deobligate funds will be sent to the Subrecipient from the County a minimum of ninety (90) days prior to termination of Agreement.

SECTION III
WORK STATEMENTS



MARICOPA COUNTY
HUMAN SERVICES DEPARTMENT

M A R I C O P A C O U N T Y
H O M E Investm entPartnerships Program
FY 2016-2017

D U N S # : 021648936

Consortium M em ber: Surprise, Arizona

Program Year: FY 2016-2017

Project: Housing Rehabilitation

FY 2016-2017 H O M E Funds: \$136,692

Type of Property: Single Fam ily

A . D E T A I L E D S C O P E O F W O R K :

Include the following-

1. Consolidated Plan goals as it relates to this activity, include the priority rating ie. High, Low .
The im provem ent and reinvestm ent of current housing stock within the City of Surprise is a High priority in the Consolidated Plan.
2. Type of assistance/activity to be provided with H O M E funds: Single Fam ily Housing Rehabilitation
O wner-occupied single fam ily housing rehabilitation w ill be provided with H O M E funds.
3. M ethods and instrum ents used for ensuring affordability: Recapture provision (insert description of how the funds w ill be recaptured ie. paid in full, pro-rated etc.) The H O M E funds w ill be secured by a D eed of Trust and Prom issory N ote and recorded with M aricopa County to ensure the hom e is not sold or transferred to another owner.
4. Anticipated use of program incom e/project proceeds:
Any program incom e w ill be used to supplem ent the completion if any additional single fam ily housing rehabilitation projects.

B . O B J E C T I V E S A N D O U T C O M E S (Check appropriate box below .):

	O U T C O M E S		
	A V A I L A B I L I T Y / A C C E S S I B I L I T Y	A F F O R D A B I L I T Y	S U S T A I N A B I L I T Y
D E C E N T H O U S I N G	☒ Single Fam ily H ousing Rehab and E m ergency Rehab, H om ebuyer A ssistance	☐ H om ebuyer A ctivities, A cquisition/Rehab of rental housing, A cquisition/N ew Construction of rental housing, Preservation of existing public housing units and TBRA , Expansion of assisted rental units in the private m arketplace	☐ H ousing A ctivities in a targeted revitalization area

C. LOGIC MODEL: PERFORMANCE INDICATORS:

INPUTS/RESOURCES In order to accomplish proposed activities, the subrecipient will need the following:	ACTIVITIES In order to address the issue, the subrecipient will conduct the following activities:	OUTPUTS Once completed, these activities will produce the following:	OUTCOMES When completed, these activities will lead to the following changes:	IMPACT Long term changes:
HOME funding	5 rehabilitations	Owner occupied housing rehabilitation	Low to moderate income families have safe and decent housing	Stable neighborhoods

D. PROPOSED BENEFICIARIES:

Targeted Population by Income Level	Number of Households	Total Number of Units
Households at or below 50%	1	1
Households at or below 60%	1	1
Households at or below 80%	3	3
TOTAL	5	5

E. PRIORITY POPULATIONS:

Complete the table below only if the Activity will specifically set aside units for a priority population. Set-asides will be enforced through contract provisions.

Priority Populations	No. of Units
Elderly	
Physically Disabled	
Other Priority Populations: Veterans	

F. PERFORMANCE REPORTING GOALS-TIMELINE OF ACTIVITIES:

MILESTONES	START DATE	COMPLETION DATE
HOME Contract signed by City Council	12/1/2016	12/15/2016
Client Pre-qualification	7/1/2017	7/15/2017
Environmental Review	9/1/2017	9/30/2017
RFQ Issued	10/1/2017	11/1/2017
Developer Selected and Signed Development Contract	11/15/2017	11/30/2017
Home Setup Report to County	12/1/2017	12/15/2017
Rehabilitation to commence	1/15/2018	2/1/2018
Rehabilitation complete or Certificate of Occupancy	6/1/2018	6/30/2018
Unit Occupied by Low / Moderate Income Person / Family	7/1/2018	7/15/2018
Completion Report submitted to City	7/15/2018	8/1/2018

Any change to the Timeline will need to be submitted to and approved by Maricopa County.

G. ACTIVITY BUDGET SUMMARY:

ACTIVITIES	HOME FUNDS FY 2016-2017	Additional Sources* (defined in Table G.)	TOTAL COST
<u>HOUSING REHABILITATION</u>			
Construction Costs-Materials	\$90,000	\$22,500	\$122,500
Builder Overhead			
Builder Profit	\$10,000	\$2,500	\$12,500
General Requirements			
Consultant/Specialist			
Permits & Fees	\$5,000	\$1,250	\$6,250
Construction Contingency	\$18,993	\$4,748.25	\$23,741.25
Sales Tax	\$12,699	\$3,174.75	\$15,873.75
Other-Infrastructure			
TOTAL	\$136,692	\$34,173	\$170,865
<u>ADMINISTRATION COSTS</u>			
Program Delivery-			
Personnel Costs			
Volunteer Labor			
GRAND TOTAL	\$136,692	\$34,173	\$170,865

H. SOURCE AND AMOUNT OF OTHER RESOURCES:

FUNDING AGENCY	CASH AMOUNT	VOLUNTEER / IN-KIND AMOUNT
City of Surprise	\$34,173	
TOTAL	\$34,173	

I. MATCH:

IDENTIFY MATCH SOURCES AND AMOUNTS THAT HAVE BEEN COMMITTED TO THE PROJECT:

Match commitment must equal 25% of the HOME funds requested.

Documentation is due at the time of request for payment(s).

Match Logs must be submitted annually by June 30th of each year.

TYPE	SOURCE / FUNDING AGENCY	TOTAL
Cash or cash equivalents from a non-federal source	City of Surprise	\$34,173
TOTAL		\$34,173

SECTION IV
COMPENSATION



MARICOPA COUNTY
HUMAN SERVICES DEPARTMENT

A. COMPENSATION

1. Subrecipient shall be reimbursed utilizing Catalog of Federal Domestic Assistance (CFDA): 14.239, HOME Investment Partnerships Program provided to the County through the U.S. Department of Housing and Urban Development (HUD).
2. Subject to the availability and authorization of funds for the explicit purposes set forth below, County will pay the Subrecipient compensation for services rendered as indicated in the following subsections.

B. METHOD OF PAYMENT

1. Subrecipient agrees to submit monthly reimbursement requests utilizing the approved Reimbursement Request Form (Attachment A) to County. Subrecipient may request funds only after the Subrecipient has satisfied the funding contingencies and federal Environmental Review conditions and has a written agreement in place for project activities. Request for reimbursement must be made using the Request for Reimbursement form incorporated in this Agreement.
2. Subrecipient may not request disbursement of funds under this Agreement until the funds are needed for payment of eligible costs. The amount of each request must be limited to the amount needed. Program income must be disbursed before the Subrecipient requests funds from the County.
3. County agrees to reimburse Subrecipient for actual allowable costs incurred, upon certification of HUD Environmental Release of Funds and submittal by Subrecipient of an itemized statement of actual expenditures incurred, supported by appropriate documentation. Reimbursement by County is not to be construed as final in the event that HUD disallows reimbursement for the Program or any portion thereof. Upon receipt of a request for reimbursement, the County has 10 days to request additional supporting documentation. After receipt of fully supported request for reimbursement or additional documentation supporting a request, the County will issue reimbursement within 30 days.
4. Subrecipient must maintain proof of said expenditures including checks, payrolls, time records, invoices, contracts, vouchers, orders and other accounting documents evidencing in proper detail the nature and propriety of the respective charges as may be required by applicable federal rules and regulations, including requirements by the Federal Office of Management and Budget, and as may otherwise be reasonably required by the County to determine or confirm that any such expenditures are pursuant and within the scope of work.

C. TIMELINESS

Subrecipient will submit Requests for Reimbursements to the County at least monthly after the initial request for reimbursement. Subrecipient must seek reimbursement of expenditures within the same fiscal year in which the expenditures are incurred. The fiscal year runs July 1 through June 30 and all Requests for Reimbursement shall be submitted no later than July 10th for the preceding fiscal year.

D. REIMBURSEMENT

The County shall provide financial assistance in an amount up to One Hundred Thirty Six Thousand Six Hundred Ninety-Two Dollars (\$136,692) subject to the terms of this Agreement and availability of funds. This Agreement price constitutes the County entire participation and obligation in the performance and completion of all work to be performed under this Agreement.

SECTION V

ATTACHMENTS & FORMS



MARICOPA COUNTY

HUMAN SERVICES DEPARTMENT

Attachment A

SUBRECIPIENT HOME CERTIFICATION

In accordance with the provisions of the Home Investment Partnerships Act and with 24 CFR 92.150 of the Home Investment Partnership Program Rule, the Subrecipient certifies that:

- (A) Before committing any funds to a activity, the Subrecipient will evaluate the activity in accordance with 24 CFR 92.504 and the guidelines that it adopts for this purpose and complete all assessments required by the rules, including, but not limited to:
 - 1. Complete all income determinations, underwriting and subsidy layering guidelines, rehabilitation standards, refinancing guideline, homebuyer program policies and affordability requires;
 - 2. Complete a timely environmental review;
 - 3. Complete an underwriting review; assess developer capacity, fiscal soundness and neighborhood market conditions; and
 - 4. The Subrecipient will not invest any more HOME funds in combination with other Federal assistance than is necessary to provide affordable housing.
- (B) The Subrecipient will only utilize HOME funds to pay for eligible activities and costs of those activities permitted in 24 CFR 92.205 through 92.209 and not specifically prohibited under 92.214.
- (C) The Subrecipient understands tenant-based rental assistance is an element of the Consolidated Plan. However, tenant-based rental assistance must be approved as part of an original application for project funding.
- (D) The submission of the program description is authorized under State and local law (as applicable), and that the Subrecipient possesses the legal authority to carry out the Home Investment Partnership (HOME) Program, in accordance with the HOME regulations;
- (E) The Subrecipient will comply with the acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, in implementing regulations and the requirements of 24 CFR 92.353;
- (F) The Subrecipient will use HOME funds pursuant to its Consolidated Plan(s) approved by the U.S. Department of Housing and Urban Development HUD and all requirements of 24 CFR Part 92;
- (G) The Subrecipient will provide a drug-free workplace by:
 - 1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
 - 2. Establishing an ongoing drug-free awareness program to inform employees about:
 - a. The dangers of drug abuse in the workplace;
 - b. The participating jurisdiction's policy of maintaining a drug-free workplace;
 - c. Any available drug counseling, rehabilitation, and employee assistance programs; and
 - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
 - 3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph 1;
 - 4. Notifying the employee in the statement required by paragraph 1 that, as a condition of employment under the grant, the employee will:

- a. Abide by the terms of the statement; and
 - b. Notify the employee in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
 5. Notifying the County in writing, within ten calendar days after receiving notice under paragraph 4 ii. from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;
 6. Taking one of the following actions, within 30 calendar days of receiving notice under paragraph 4 ii, with respect to any employee who is so convicted
 - a. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
 - b. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal State, or local health, law enforcement, or other appropriate agency.
 7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1, 2, 3, 4, 5, and 6.
- (H) To the best of its knowledge and belief:
1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the County, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant, loan, or cooperative agreement;
 2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant, loan, or cooperative agreement, the Subrecipient will complete and submit Standard Form -LLL, "Disclosure of Lobbying Activities," in accordance with its instructions; and
 3. The Subrecipient will require that the language of paragraph (F) of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and agreements under grants, loans, and cooperative agreements) and that all Vendors shall certify and disclose accordingly.
- (I) The Subrecipient shall, upon proper notice or with knowledge obtained by itself or others, take any and all proactive actions necessary, and provide any and all applicable remedies to address and correct any act by itself, its employees, officials, successors, assigns, Subrecipients, or vendors that resulted in any wrongdoing (intentional or unintentional); misuse or misappropriation of funds; the incorrect or improper disposition of funds; any violation of any federal, state, or local law, rule, or regulation; or the breach of any certification or warranty provided in this Agreement.

 Signature (Subrecipient Representative)

 Date

 Printed/Typed Name

 Title

JURISDICTION CERTIFICATION

In accordance with the applicable statutes and the regulations governing the consolidated plan regulations, the jurisdiction certifies that:

Affirmatively Further Fair Housing — The jurisdiction shall affirmatively further fair housing, which means it shall conduct an analysis of impediments to fair housing choice within the jurisdiction, take appropriate actions to overcome the effects of any impediments identified through that analysis, and maintain records reflecting that analysis and actions in this regard.

Anti-displacement and Relocation Plan — It shall comply with the acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, and implementing regulations at 49 CFR 24; and it has in effect and is following a residential anti-displacement and relocation assistance plan required under section 104(d) of the Housing and Community Development Act of 1974, as amended, in connection with any activity assisted with funding under the CDBG or HOME programs.

Drug Free Workplace — It shall or shall continue to provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that shall be taken against employees for violation of such prohibition;
2. Establishing an ongoing drug-free awareness program to inform employees about –
 - (a) The dangers of drug abuse in the workplace;
 - (b) The grantee's policy of maintaining a drug-free workplace;
 - (c) Any available drug counseling, rehabilitation, and employee assistance programs; and
 - (d) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph 1;
4. Notifying the employee in the statement required by paragraph 1 that, as a condition of employment under the grant, the employee shall –
 - (a) Abide by the terms of the statement; and
 - (b) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
5. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph 4(b) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4(b), with respect to any employee who is so convicted –
 - (a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
 - (b) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1, 2, 3, 4, 5, and 6.

Affirmative Marketing -24 CFR 92.351

1. Subrecipient must adopt and follow affirmative marketing procedures and requirements for rental and homebuyer projects containing five or more HOME-assisted housing units. Affirmative marketing requirements and procedures also apply to all HOME-funded programs, including, but not limited to, tenant-based rental assistance and down payment assistance programs. Affirmative marketing steps consist of actions to provide information and otherwise attract eligible persons in the housing market area to the available housing without regard to race, color, national origin, sex, religion, familial status, or disability. If the jurisdiction's written agreement with the project owner permits the rental housing project to limit tenant eligibility or to have a tenant preference in accordance with 24 CFR §92.253(d)(3), the jurisdiction must have affirmative marketing procedures and requirements that apply in the context of the limited/preferred tenant eligibility for the project.
2. The affirmative marketing requirements and procedures adopted must include:
 - (a) Methods for informing the public, owners, and potential tenants about Federal fair housing laws and the jurisdiction's affirmative marketing policy (e.g., the use of the Equal Housing Opportunity logo type or slogan in press releases and solicitations for owners, and written communication to fair housing and other groups);
 - (b) Requirements and practices each Subrecipient and owner must adhere to in order to carry out the jurisdiction's affirmative marketing procedures and requirements (e.g., use of commercial media, use of community contacts, use of the Equal Housing Opportunity logo type or slogan, and display of fair housing poster);
 - (c) Procedures to be used by Subrecipients and owners to inform and solicit applications from persons in the housing market area who are not likely to apply for the housing program or the housing without special outreach (e.g., through the use of community organizations, places of worship, employment centers, fair housing groups, or housing counseling agencies);
 - (d) Records that will be kept describing actions taken by the jurisdiction and by Subrecipients and owners to affirmatively market the program and units and records to assess the results of these actions; and
 - (e) A description of how the jurisdiction will annually assess the success of affirmative marketing actions and what corrective actions will be taken where affirmative marketing requirements are not met.
3. A State that distributes HOME funds to units of general local government must require each unit of general local government to adopt affirmative marketing procedures and requirements that meet the requirement in 24 CFR 92.351.

Minority outreach-24 CFR 92.351

The Subrecipient must prescribe procedures acceptable to HUD to establish and oversee a minority outreach program within its jurisdiction to ensure the inclusion, to the maximum extent possible, of minorities and women, and entities owned by minorities and women, including, without limitation, real estate firms, construction firms, appraisal firms, management firms, financial institutions, investment banking firms, underwriters, accountants, and providers of legal services, in all contracts entered into by the jurisdiction with such persons or entities, public and private, in order to facilitate the activities of the jurisdiction to provide affordable housing authorized under this Act or any other Federal housing law applicable to such jurisdiction. Section 85.36(e) of this title describes actions to be taken by a jurisdiction to assure that minority business enterprises and women business enterprises are used when possible in the procurement of property and services.

Anti-Lobbying — To the best of the jurisdiction's knowledge and belief:

1. No Federal appropriated funds have been paid or shall be paid, by or on behalf of it, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement;
2. If any funds other than Federal appropriated funds have been paid or shall be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, it shall complete and submit Standard Form -LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It shall require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all sub awards at all tiers including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements and that all Subrecipients shall certify and disclose accordingly.

Authority of Jurisdiction — The consolidated plan is authorized under State and local law (as applicable) and the jurisdiction possesses the legal authority to carry out the programs for which it is seeking funding, in accordance with applicable HUD regulations.

Consistency with plan — The housing activities to be undertaken with CDBG, HOME, ESG, and HOPEWA funds are consistent with the strategic plan.

Section 3 — It shall comply with section 3 of the Housing and Urban Development Act of 1968, and implementing regulations at 24 CFR Part 135.

Equal Access Rule — It shall comply with requirements of the Housing and Urban Development Equal Access Rule (24 CFR Part 5 Final Rule 5863) to ensure equal access to housing and services regardless of gender identity.

Signature/Authorized City Official

Date

Printed/Typed Name

Title

City Name

APPENDIX TO CERTIFICATIONS

INSTRUCTIONS CONCERNING LOBBYING AND DRUG-FREE WORKPLACE REQUIREMENTS:

Lobbying Certification

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Drug-Free Workplace Certification

1. By signing and/or submitting this application or grant agreement, the grantee is providing the certification.
2. The certification is a material representation of fact upon which reliance is placed when the agency awards the grant. If it is later determined that the grantee knowingly rendered a false certification, or otherwise violates the requirements of the Drug-Free Workplace Act, HUD, in addition to any other remedies available to the Federal Government, may take action authorized under the Drug-Free Workplace Act.
3. Workplaces under grants, for grantees other than individuals, need not be identified on the certification. If known, they may be identified in the grant application. If the grantee does not identify the workplaces at the time of application, or upon award, if there is no application, the grantee must keep the identity of the workplace(s) on file in its office and make the information available for Federal inspection. Failure to identify all known workplaces constitutes a violation of the grantee's drug-free workplace requirements.
4. Workplace identifications must include the actual address of buildings (or parts of buildings), or other sites where work under the grant takes place. Categorical descriptions may be used (e.g., all vehicles of a mass transit authority or State highway department while in operation, State employees in each local unemployment office, performers in concert halls or radio stations).
5. If the workplace identified to the agency changes during the performance of the grant, the grantee shall inform the agency of the change(s), if it previously identified the workplaces in question (see paragraph three).
6. The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:
 - a. Place of Performance: City of Surprise
 - b. Check ___ if there are workplaces on file that are not identified here.
 - c. The certification with regard to the drug free-workplace is required by 24 CFR Part 24, subpart F.

7. Definitions of terms in the Non-procurement Suspension and Debarment Commission rule and Drug-Free Workplace Commission rule apply to this certification. Grantees' attention is called, in particular, to the following definitions from these rules:
- a. "Controlled substance" means a controlled substance in Schedules I through V of the Controlled Substances Act (21 U.S.C. 812) and as further defined by regulation (21 CFR 1308.11 through 1308.15);
 - b. "Conviction" means a finding of guilt (including a plea of nolo contendere) or imposition of sentence, or both, by any judicial body charged with the responsibility to determine violations of the Federal or State criminal drug statutes;
 - c. "Criminal drug statute" means a Federal or non-Federal criminal statute involving the manufacture, distribution, dispensing, use, or possession of any controlled substance;
 - d. "Employee" means the employee of a grantee directly engaged in the performance of work under a grant, including: (i) All "direct charge" employees; (ii) all "indirect charge" employees, unless their impact or involvement is insignificant to the performance of the grant; and (iii) temporary personnel and consultants who are directly engaged in the performance of work under the grant and who are on the grantee's payroll. This definition does not include workers not on the payroll of the grantee (e.g., volunteers, even if used to meet a matching requirement; consultants or independent Subrecipients not on the grantee's payroll; or employees of Subrecipients or vendors in covered workplaces).

REQUEST FOR REIMBURSEMENT

Reimbursement #:

Subrecipient Name			Date	
Contract No			Reporting Category	
Subrecipient Address			Contract Amount	\$ -
Contact Person			Contract Balance	\$ -
Phone		Email	Contract Start	
County Vendor#			Contract End	

a	b	c	d	e.	f	g	h	i	j
Draw Type (EN,CR)	Activity Code	IDIS Act No.	Address	PI Receipted in IDIS	IDIS Activity Setup Amt. (\$)	Amount Expended	Amount Requested	Remaining Balance	Final Draw for Activity Y/N
					\$ -	\$ -		\$ -	
					\$ -	\$ -		\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
								\$ -	
Total				\$ -	\$ -	\$ -	\$ -	\$ -	

Recipient Authorized Signature		Date	Title	
Recipient Authorized Signatory certifies that all activities undertaken by the contractor with funds provided under this contract have been carried out in accordance with the contract. Attach wiring information if not previously submitted. Attach alternate mailing address if necessary.				
Performance Reports	Current ☐	Not Current ☐	For MCHSD Use Only	
Match Report	Current ☐	Not Current ☐		
MCHSD Sr. Grants Acct Approval				
MCHSD Project Coordinator Approval		Date	MCHSD Assistant Director Approval	Date

Attachment C

2015 HOME Program Maximum Per-Unit Subsidy Limits for all HOME assisted project activities as of November 18, 2015

BR Size	Section 234 ELEVATOR BASE LIMITS [most current Dated 11/18/15]	X	240% HCP	=	Max Per Unit HOME Subsidy Limit
0BR	\$ 58,378	X	2.4	=	\$ 140,107
1BR	66,923	X	2.4	=	160,615
2BR	81,377	X	2.4	=	195,305
3BR	105,276	X	2.4	=	252,662
4BR+	115,560	X	2.4	=	277,344

For additional information, refer to HUD Informational Bulletin CPD -16-01

For HOME projects which received a HOME commitment under an executed HOME Agreement during the period from March 17, 2015 (the date when Interim Policy Notice 15-003 was issued) through November 17, 2015—the PJ must use slightly lower per-unit elevator limits, which were computed using the 2014 Basic Statutory Mortgage Limits x 2.40% HCP. Additionally, HOME commitments made prior to March 17, 2015 require the use of the 2012-221d3 elevator per-unit limit.

Monthly Summary of Program Income and Recaptured Funds Received and Used									
Fiscal Year: 2014-2015									
For the Month of:									

[illegible]

[illegible]



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date: January 17, 2017
Submitting Department:
Staff Recommendations: None

Contact Person: Sherry Ann Aguilar, City Clerk
District: Citywide

Consent	☒	Regular	Public Hearing	Report/Discussion
---------	-------------------------------------	---------	----------------	-------------------

Agenda Wording:

Consideration and action on the meeting minutes of January 3, 2017 Regular City Council Work Session and Regular City Council Meeting.

Motion:

I move to approve the meeting minutes.

Background:

Objective Analysis:

Policy Compliant:

Financial Impact:

Budget Impact:

FTE Impact:

ATTACHMENTS:

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☐ [Minutes](#)

CITY OF SURPRISE
Regular City Council Work Session Minutes
16000 North Civic Center Plaza
Surprise, AZ 85374

Tuesday, January 3, 2017 @ 05:01 PM

Call to Order

Roll Call

Mayor Wolcott called the **Regular City Council Work Session** to order at 05:01 p.m. at Surprise City Hall Council Chamber, 16000 North Civic Center Plaza Surprise, Arizona 85374, on **Tuesday, January 3, 2017**. Also in attendance with Mayor Wolcott were Council Member Winters, Council Member Hayden, Council Member Williams, Council Member Remley, Council Member Hall, and Council Member Tande.

Staff City Manager, Bob Wingenroth, City Attorney, Robert Wingo, and City
Present: Clerk, Sherry Ann Aguilar.

Pledge of Allegiance

Call to the Public

Council Member Winters made the motion to recess the Regular City Council Work Session and enter into executive session at 5:02 PM. Council Member Williams seconded the motion. Seven yes votes. Motion carried.

Regular Agenda Item - Non-Public Hearing

1 – Consideration and action to enter into executive session for discussion and consultation with staff in order to consider the City Council's position regarding contract negotiations and the sale or lease of real property in the proximate vicinity of Surprise City Hall and Surprise Stadium pursuant to ARS 38-431.03(A(4) and (7).

2 – Consideration and action to enter into executive session with the City Attorney for discussion and consultation for legal advice pertaining to zoning of property within the vicinity of City Hall pursuant to A.R.S. 38-431.03(A)(3).

Regular City Council Work Session Minutes – January 3, 2017 – Page 2

Executive Session

Adjournment

Council Member Tande made the motion to adjourn the Regular City Council Work Session of January 3, 2017 at 6:02 PM. Council Member Williams seconded the motion. Seven yes votes. Motion carried.

Sharon R. Wolcott, Mayor

ATTEST:

Sherry Ann Aguilar, City Clerk

CERTIFICATION:

I, Sherry Ann Aguilar, City Clerk for the City of Surprise, Maricopa County, Arizona, do hereby verify that these are the true and correct minutes of the Regular City Council Work Session of **Tuesday, January 3, 2017**.

Sherry Ann Aguilar, City Clerk

CITY OF SURPRISE
Regular City Council Meeting Minutes
16000 North Civic Center Plaza
Surprise, AZ 85374

Tuesday, January 3, 2017 @ 06:08 PM

Call to Order

Roll Call

Mayor Wolcott called the **Regular City Council Meeting** to order at 06:08 p.m. at Surprise City Hall Council Chamber 16000 North Civic Center Plaza Surprise, Arizona 85374, on **Tuesday, January 3, 2017**. Also in attendance with Mayor Wolcott were Council Member Winters, Council Member Hayden, Council Member Williams, Council Member Remley, Council Member Hall, and Council Member Tande.

Staff City Manager, Bob Wingenroth, City Attorney, Robert Wingo, and City
Present: Clerk, Sherry Ann Aguilar.

Pledge of Allegiance

Proclamation and Community Acknowledgements

City Manager Report

City Attorney Report

City Clerk Report

City Clerk, Sherry Ann Aguilar will issue the Oath of Office for Mayor Sharon Wolcott, Jim Hayden, District 2; John Williams, District 3 & Ken Remley, District 4 and distribute a Certificate of Election.

Call to the Public

Leo Mankiewicz - addressed an article in the paper regarding the Surprise Downtown development.

Consent Agenda

Regular City Council Meeting Minutes – January 3, 2017 – Page 2

1 – Consideration and action pertaining to approval of a fiscal year 2017 budget amendment by reallocating appropriations in the amount of \$127,600 within the Public Works Department from supplies and services to personnel for standby pay associated with emergency response after hours and on weekends; Resolution # 2017-01 - APPROVED

2 – Consideration and action on the Regular City Council Meeting minutes of December 20, 2016 - APPROVED

Council Member Winters made the motion to approve the consent agenda. Council Member Williams seconded the motion. Seven yes votes. Motion carried.

Regular Agenda Item - Non-Public Hearing

3 – Consideration and action pertaining to repealing Ordinance # 2015-24 with respect to the reporting authority of the City Attorney and approving an employment contract with the current City Attorney; Ordinance # 2017-04 - APPROVED

City Attorney Wingo excused himself from the dais, and asked Attorney, Bill Simms to represent him.

Council Member Hall - Read a statement for the record, thanking our City Manager and City Attorney having a cohesive working environment. The code states that the Council Members cannot give orders to any City employees. We have a Council/Manager form of government.

Council Member Winters - Brought forward from my colleague Jim Hayden, not sure of the reason why. Over \$500,000.00 spent on a never ending legal battle, posturing, outside attorneys hired, and fired, the system was not working. We have made headway since changes were made, and allowed the City Manager to negotiate, there is a project breaking ground right now. Our current Attorney is a man of great character with a great staff. In 2017 we are going to make some great headway in the next year. Don't take steps back, let's move forward.

Council Member Williams - I don't disagree with what Council Members Hall and Winters have to say. I voted against this last time, it was a spirited discussion, I separated myself from the characters. The City Attorney needs to act independently of himself, he represents the City entity. I am in favor of this as an appointed position.

Regular City Council Meeting Minutes – January 3, 2017 – Page 3

Council Member Remley - I agree with the comments that everyone has made, especially the City Manager and City Attorney. We may not always have the as the years pass, but must remain unfettered, part of their oath as an Attorney. This is why I think the change should be made.

Council Member Tande - I voted against the change last time, but I agree with the points Council has. The Council as a whole manages the appointment process of the appointed staff. The evaluation process is good for Council to gage progress for each position and use as a tool if improvement is needed. Most cities/towns have the Attorney as an appointed position. I suggest that we include in our metrics and our goals, then I think this will work well.

Council Member Hayden - The situation as it is now, is unnecessary, if I have a concern with the City Manager and need to consult the City Attorney, I need the ability to do this.

Public comments:

Ken Wright - I think it is really clear what happened, the City Attorney started reporting to the City Manager. The minutes reflect the policy making of the City sits right here with the Council, and the City Manager needs to carry out these policies by direction of the City Manager. When this was changed, the arguments were very weak. The reporting responsibility needs to be with Council and it never should have changed in the first place. Making this change is not a step backwards, it will be a step forward.

Mayor Wolcott - Read a written statement for the record. The reason I opposed this change, there was no true debates on the merits of the issue, and that needed to happen in the Chamber with all of the Council members. The undertones are not healthy for this City, and it still continues today. We are not a Home Rule, we are a statutory authority. We do have certain latitude to create policy. The attorney represents the entity of the City, that structure was created to defend the City. He must be free to advise the Mayor and Council without fear of reprisal, his door must always be open. When 4 more members of the body refuse Council, it is their choice but should be done publicly.

Council Member Hayden made the motion to approve Ordinance 2015-24. Council Member Tande seconded the motion. Five yes votes, two no votes (Hall and Winters). Motion carried.

4 – Consideration and action pertaining to approval of a fiscal year 2017 budget amendment by reallocating appropriations of \$500,000 from contingency within the Grants Fund to the General Capital Projects Fund and a transfer of actual funds from the General Fund to the General Capital Projects Fund to provide funding for the construction of eight additional Pickleball courts; Resolution # 2017-02 - FAILED

CRS Assistant Director, Donna Miller gave a brief presentation.

Council Member Remley - inquired about the additional funding.

City Manager Wingenroth - During budget process, it was revenue over budget and created funding for this project.

Assistant Finance Director Askelson - Answered the question, 3.5 million surplus.

Council Member Winters - Annual revenue for the first year \$7,600. We have a deficit?

Finance Director, Lindsey Duncan- Construction in the next month or so, you would get a portion of the operating costs.

Ms. Miller - At least a thousand players coming here for 2 tournaments per year, staying in our hotels and eating at our restaurants.

Council Member Tande - I do like the fact of possible tournaments, hotels, restaurants, etc., We have only 8 courts right now, are they really busy? When the weather is nice, the courts are packed. This goes along with how we are branding Surprise and it's in our downtown area.

Council Member Hall - How did you arrive at \$7,600.?

Ms. Miller - Staff based it on current activities/tournaments, etc.,

Council Member Hall - I love Pickleball, but there has always been the question, show me the economic impact, what tournaments, who is coming, and where are they staying? Some stay in RV's, some stay with friends.

Council Member Williams - The relocation of the sand volleyball, will they be lighted?

Council Member Remley - Is this half million dollars, provide for the relocation of the volleyball courts that we currently have? A lot of folks are using the volleyball courts consistently.

Regular City Council Meeting Minutes – January 3, 2017 – Page 5

Council Member Tande - I am concerned that we were not able to approve the Emergency Management person in our budget, but confident we will be able to discuss this budget cycle. I am hoping the theme this year is recreation for our youth, the last time we did this, the population was much smaller so we are that far behind.

Council Member Remley - My big concern is since our budget was so tight last year, we still don't know the full impact with the bridge closure and I am not in a real big hurry to spend this money right now.

Council Member Tande made the motion to approve Resolution 2017-02. The motion failed due to lack of a second.

5 – Consideration and action pertaining to approval of Neighborhood Grant Program awards as recommended by the Committee on Community Outreach, Partnerships, and Grants for the fiscal year 2016-2017 Neighborhood Grant Applications - APPROVED

Seth Dyson gave a brief overview of this item.

Council Member Williams gave an overview of the process and commented that this project is not catching on throughout the City. Staff has done an outreach but the interest has been minimal.

Council Member Hall - You took the words out of my mouth, I love Benevilla and WHAM, they do great stuff but I know that CM Williams saw something different with this. Concerned we are not getting more applicants throughout the City. Benevilla Community Garden, very familiar with this project and fully support, but what are they going to use the funding on? The same thing about the Recycled Arts Festival, did they give us detail on how they will spend the money? Gave positive feedback for Mr. Dyson on how everyone is impressed with him and how he represents the City.

Council Member Winters made the motion to approve the Neighborhood Grant Program awards. Council Member Williams seconded the motion. Seven yes votes. Motion carried.

6 – Consideration and action pertaining to approval of a fiscal year 2017 budget amendment establishing a new Worker's Compensation Internal Service Fund, by reallocating appropriations of \$800,000 from Grants Fund contingency to the newly created fund, transferring actual funds of \$800,000 from the General Fund to the newly created fund, and authorizing the addition of one FTE to support the transition to a self-insured and self-administered worker's compensation program; Resolution # 2017-03 - APPROVED

Regular City Council Meeting Minutes – January 3, 2017 – Page 6

Risk Manager, Brian Carmichael gave a brief overview on Resolution No. 2017-03.

Council Member Remley - Timing, the existing worker's comp premiums, when can we change? June 2017. Is it necessary that the reserve be established right now, or can it wait until the end of the fiscal year?

Council Member Hall - Good job, great idea. How did you come up with that figure?

It's two times the claims.

Council Member Tande - Can you walk us through the mechanics.

Council Member Williams made the motion to approve Resolution 2017-03. Council Member Tande seconded the motion. Seven yes votes. Motion carried.

7 – Consideration and action pertaining to the approval of the Preliminary Plat for Tierra Verde West, dated November 9, 2016, an approximately 79.56 acre property located north of the Happy Valley Road alignment between the 155th and 159th Avenue alignments - APPROVED

Council Member Hall - My only concern is that all of the people have to go out to 163rd Avenue, no other way to get out of there.

City Planner, Kuhfuss - Developer has to develop Happy Valley Road as part of the agreement.

Council Member Winters - Let's not forget Jomax Road is now paved, they have waited for a long time.

Council Member Tande - Safety is my question. When the water gets down to the channel what is the plan?

Ted Northrop, ATWELL, explained the map and water channel system.

Council Member Winters made the motion to approve the Preliminary Plat for Tierra Verde West. Council Member Hall seconded the motion. Seven yes votes. Motion carried.

Other Business

Mayor/Council Report

Regular City Council Meeting Minutes – January 3, 2017 – Page 7

Council Member Remley - During this past year, a lot of folks know that the town I grew up in is similar to the City of Surprise. La Mirada, CA, a small town with olive orchard, my brother and mother served on the Historical Committee. He presented Ms. Aguilar with a History Book from La Mirada, CA.

Executive Session

Adjournment

Council Member Williams made the motion to adjourn the Regular City Council Meeting of January 3, 2017 at 7:58 PM. Council Member Hall seconded the motion. Seven yes votes. Motion carried.

Sharon R. Wolcott, Mayor

ATTEST:

Sherry Ann Aguilar, City Clerk

CERTIFICATION:

I, Sherry Ann Aguilar, City Clerk for the City of Surprise, Maricopa County, Arizona, do hereby verify that these are the true and correct minutes of the of **Tuesday, January 3, 2017**.

Sherry Ann Aguilar, City Clerk



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date:	January 17, 2017	Contact Person:	Robert Kuhfuss, Community Development
Submitting Department:	CD	District:	3
Staff Recommendations:	Approve		

Consent	Regular	Public Hearing	x	Report/Discussion
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Agenda Wording:

Consideration and action pertaining to the annexation of approximately 203.28 acres located generally between Waddell Road, Cactus Road, Cotton Lane and 175th Avenue; Ordinance # 2017-01.

Motion:

I move to approve Ordinance # 2017-01.

Background:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of an annexation request involving approximately 203 acres located in the southwest portion of the City of Surprise. This request precedes a related Zone Change and Preliminary Plat being processed under FS16-391 as well as a related Zone Change and Preliminary Plat being processed under FS16-392, which are discussed under separate cover.

Objective Analysis:

The majority of the properties currently enjoy Maricopa County Rural-43 (RU-43) zoning with the exception of a small property located at the southeast corner of the annexation area which is currently zoned County C-3. If annexed, the properties will assume similar RR (Residential Ranch) zoning and CR (Regional Commercial) zoning, respectively. While the majority of the annexation area is also included in the aforementioned zone change request in anticipation of a proposed residential development, approximately 15 acres of land will remain in agricultural production and not be part of the zone change request. Also, the annexation area does not include two properties owned by Paragon Management, Inc. and are associated with the Paradise Honors School. If approved, the proposed annexation will increase the corporate limits of the City of Surprise and allow for the subsequent approval of two (2) related zone change requests and two (2) related Preliminary Plat requests, which in turn will allow the majority of the property to be developed in accordance with the City of Surprise General Plan and Unified Development Code, while reducing the size of a long-standing County island.

Policy Compliant:

The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character

Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various neighborhood types included within the Character Area. As currently active or fallow farm land, however, the Rural Neighborhood Type most closely aligns with this property as it supports agricultural uses and related accessory uses such as barns or stables. If the property is annexed, it will achieve “like-zoning”, which will allow those uses to continue up until the time the property is rezoned thereby maintaining continuity with the General Plan's land use designation. While this is true, the proposed annexation anticipates the subsequent rezoning of a major portion of the property to accommodate up to 900 residential lots with an overall density of approximately 5 DU/Ac, which most closely aligns with the Suburban Neighborhood Type and is consistent with the General Plan.

Financial Impact:

The proposed annexation will have a negative net impact to the City's operating funds and a positive net impact to the City's enterprise funds.

Budget Impact:

It is likely that city services are being and will continue to be provided to the area being considered for annexation. The budget impact related to annexation will be incorporated into future annual budgets as necessary.

FTE Impact:

This item does not have a direct impact on current staffing levels.

ATTACHMENTS:

Click to download

- ☐ [00 - FS16-427 - Magnolia Annexation - Staff Report](#)
 - ☐ [01 - FS16-427 - Magnolia Annexation - Vicinity Map](#)
 - ☐ [02 - FS16-427 - Magnolia Annexation - Case Map](#)
 - ☐ [03 - FS16-427 - Magnolia Annexation - Recorded Blank Annexation Petition](#)
 - ☐ [04 - FS16-427 - Magnolia Annexation - Public Participation Report Excerpt](#)
 - ☐ [ORDINANCE](#)
 - ☐ [06 - FS16-427 - Magnolia Annexation - Financial Impact Analysis Memo](#)
 - ☐ [07 - FS16-427 - Magnolia Annexation - Public Engagement Form](#)
 - ☐ [08 - FS16-427 - Magnolia Annexation - Presentation](#)
 - ☐ [Signed Annexation petition](#)
-

Case: **FS16-427**

Project Name: Magnolia

Council District: 3

City Council Date: **January 17, 2017**

Planner: Robert H. Kuhfuss, AICP

Owner: S & S Cotton, LLC et. al.

Applicant: Mark Reddie of LVA Urban Design Studio on behalf of AZ Community Development, LLC

Request: Annexation

Site Location: Generally located between Cotton Lane, 175th Avenue, Waddell Road and Cactus Road

Site Size: 203.28 acres (approx.)

Density: N/A

General Plan Conformance: The proposal is consistent with the Surprise General Plan 2035

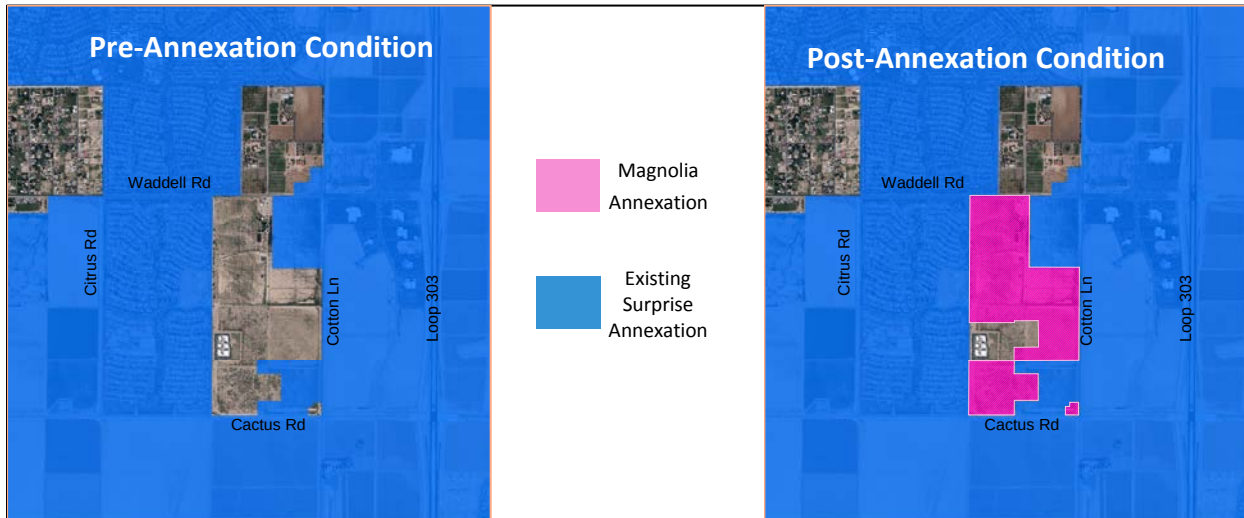
Support/Opposition: None known

Alternative Actions: **Approve:** Approval of the proposed annexation will increase the corporate limits of the City of Surprise and allow for the subsequent approval of two (2) related zone change requests and two (2) related Preliminary Plat requests, which in turn will allow the majority of the property to be developed in accordance with the City of Surprise General Plan and Unified Development Code.

Deny: Denial of the proposed annexation will result in the continuation of a long-standing county island and prevent the City Council from taking action regarding the related Zone Change and Preliminary Plat requests.

Project Description:

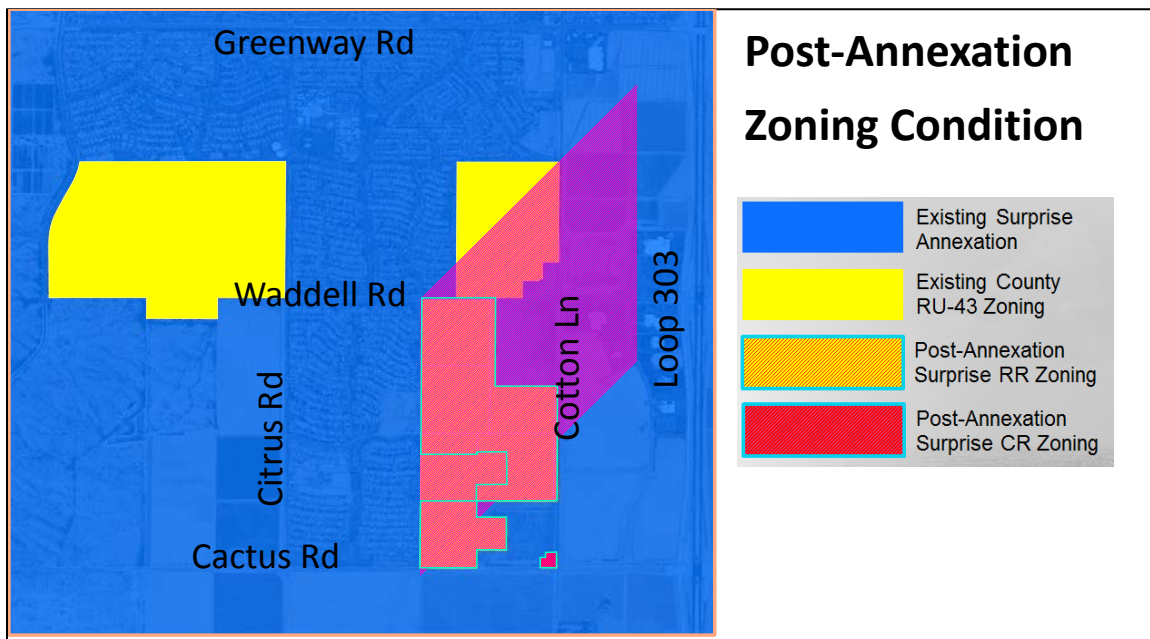
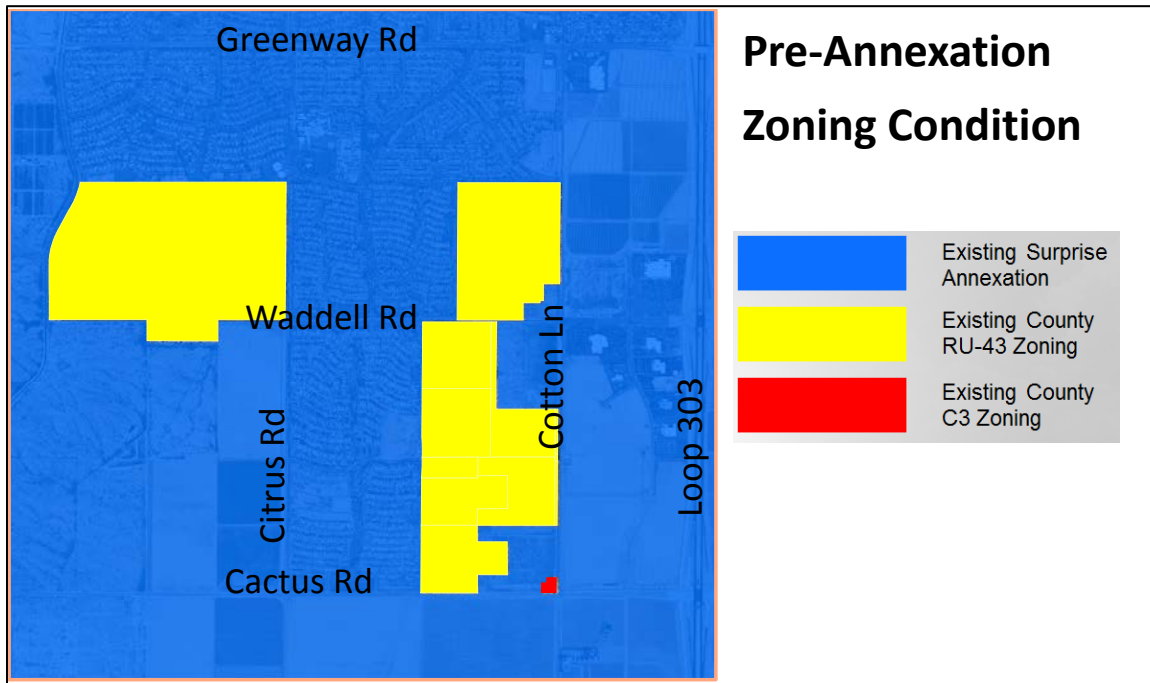
Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development LLC, seeks annexation of several parcels generally located between Cotton Lane and 175th Avenue, Waddell Road and Cactus Road in anticipation of a new residential development. The annexation proposal includes all unincorporated lands located within the aforementioned boundaries except for two (2) properties owned by Paragon Management, LLC, which are associated with Paradise Honors High School.



Arizona Revised Statutes require the filing of a blank annexation petition. The blank petition relating to the subject property was recorded with the Maricopa County Recorder's Office on October 25 2016 (see attached). Arizona Revised Statutes also require that no signatures be obtained during the first 30 days following the filing of the blank petition and that a public hearing be held during the last 10 days of the 30-day waiting period. The hearing was held on November 15, 2016. Once the public hearing is held and the 30-day waiting period has ended, signatures may be collected. State statute further requires that an excess of 50% of the land owners and assessed valuation for all real and personal property sign the petition in order to validate the petition. State statute also allows up to one year following the end of the 30-day period to obtain the required number of signatures. Staff has not received all of the required signatures as of the writing of this report, but anticipates said signatures to be obtained in the immediate future.

The majority of the properties currently enjoy Maricopa County Rural-43 (RU-43) zoning with the exception of a small property located at the southeast corner of the annexation area which is currently zoned County C-3. If annexed, the properties will assume similar RR (Residential Ranch) zoning and CR (Regional Commercial) zoning, respectively. The following two maps depict the pre and post-annexation zoning of the property. Most of the land involved in the annexation, however, is also included in a zone change request being processed under two separate zone change requests (FS16-391 and FS16-392), which are discussed under separate

cover. (Note that cases FS16-391 and FS16-392 also include proposed Preliminary Plats which are discussed under separate cover as well.)



While the majority of the annexation area is also included in the aforementioned zone change request in anticipation of a proposed residential development, approximately 15 acres of land will remain in agricultural production and not be part of the zone change request. Also, the annexation area does not include two properties owned by Paragon Management, Inc. and are associated with the Paradise Honors School.

Staff conducted an economic impact analysis, which shows a negative net impact to the City's operating fund, but a positive net impact to the City's enterprise funds. The economic impacts are summarized in the attached memo dated December 22, 2016.

Background:

July 28, 2016: Staff met with the applicant to discuss the project during a regularly scheduled Concept Review meeting under CR16-305.

August 8, 2016: Staff met with the applicant to discuss annexation logistics.

August 23, 2016: Staff met with the applicant to discuss product design.

September 12, 2016: The applicant filed a request for a Zone Change and Preliminary Plat under case FS16-391. The applicant filed a second request for a companion Zone Change and Preliminary Plat under case FS16-392. The latter also included an annexation request.

September 28, 2016: On behalf of the applicant, staff opened case FS16-427 relating to the annexation of the subject property.

October 19, 2015: The applicant held a neighborhood outreach meeting to discuss the project.

October 31, 2016: Staff met with the applicant to discuss review comments.

November 8, 2016: The applicant filed their second submittal for the subject case.

November 15, 2016: The City Council approved the blank annexation petition relating to the annexation of the subject property as well as other proximal properties under case FS16-427.

December 1, 2016: Staff met with the applicant to discuss the Final Plat relating to the project during a regularly scheduled Concept Review meeting under CR16-511.

December 15, 2016: The Commission continued the case to a date-certain of January 5, 2017 due to an advertising error.

January 5, 2017: The Zone Change and Preliminary Plat requests being processed under FS16-391 and FS16-392 are scheduled for review by the Planning and Zoning Commission; however, the Commission's recommendation is unknown as of the writing of this report.

Citizen Outreach:

The site was posted in accordance with the SUDC and state statute. The City of Surprise also sent notices via First Class mail in accordance with the SUDC and state statute. The applicant held a citizen outreach meeting on October 19, 2016, which was well attended. While staff has received no items of opposition or support for the project, the applicant's Citizen Participation Final Report indicates one (1) member of the public offered positive feedback and two (2) members of the public offered negative feedback. The summary report also indicated that seven (7) people offered neutral comments and suggestions. The body of the summary report is included as an attachment to this report.

Utility and Services Table:

Electric:	Arizona Public Service
Water:	EPCOR
Wastewater:	City of Surprise
Refuse:	City of Surprise
Natural Gas:	Southwest Gas
Irrigation:	Maricopa Water District
Schools:	Dysart USD

Conformance with Adopted Plans:

Surprise General Plan 2035: The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various neighborhood types included within the Character Area. As currently active or fallow farm land, however, the Rural Neighborhood Type most closely aligns with this property as it supports agricultural uses and related accessory uses such as barns or stables. If the property is annexed, it will achieve "like-zoning", which will allow those uses to continue up until the time the property is rezoned thereby maintaining continuity with the General Plan's land use designation. While this is true, the proposed annexation anticipates the subsequent rezoning of a major portion of the property to accommodate up to 900 residential lots with an overall density of approximately 5 DU/Ac, which most closely aligns with the Suburban Neighborhood Type and is consistent with the General Plan.

162 **Reviewing Agencies:**

163
164 **Luke Air Force Base (LAFB):** In a letter dated October 3, 2015, LAFB indicated that the proposed
165 development met the Graduated Density Concept and would not interfere with flight operations.
166 LAFB also requested a robust notification program.

167
168 **Arizona Department of Transportation (ADOT):** In an email dated September 20, 2016, ADOT
169 indicated the proposed annexation would not affect any ADOT highway facilities.

170
171 **Maricopa Water District (MWD):** In a memo dated October 19, 2016, MWD indicated the property
172 covered by this application is subject to certain MWD interests including existing facilities and other
173 property interests. MWD requires that prior to Final Plat approval, certain comments must be
174 addressed.

175
176 **Summary:**

177
178 The proposed annexation, if approved, will allow the City Council to proceed with the companion
179 related Zone Change and Preliminary Plat applications that will in turn set the stage for significant
180 residential development within the annexation area and beyond. The proposed annexation will
181 generated a negative impact to the City's operating funds, but a positive impact to the City's
182 enterprise funds.

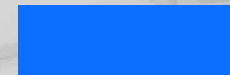
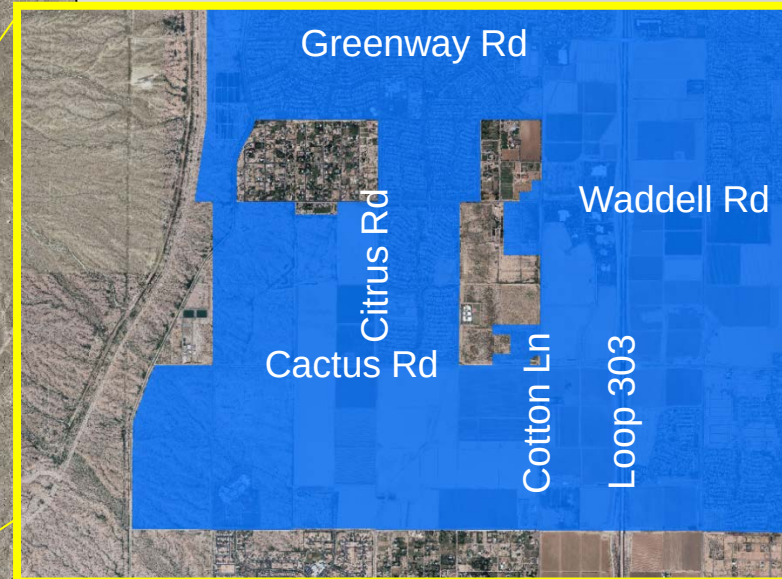
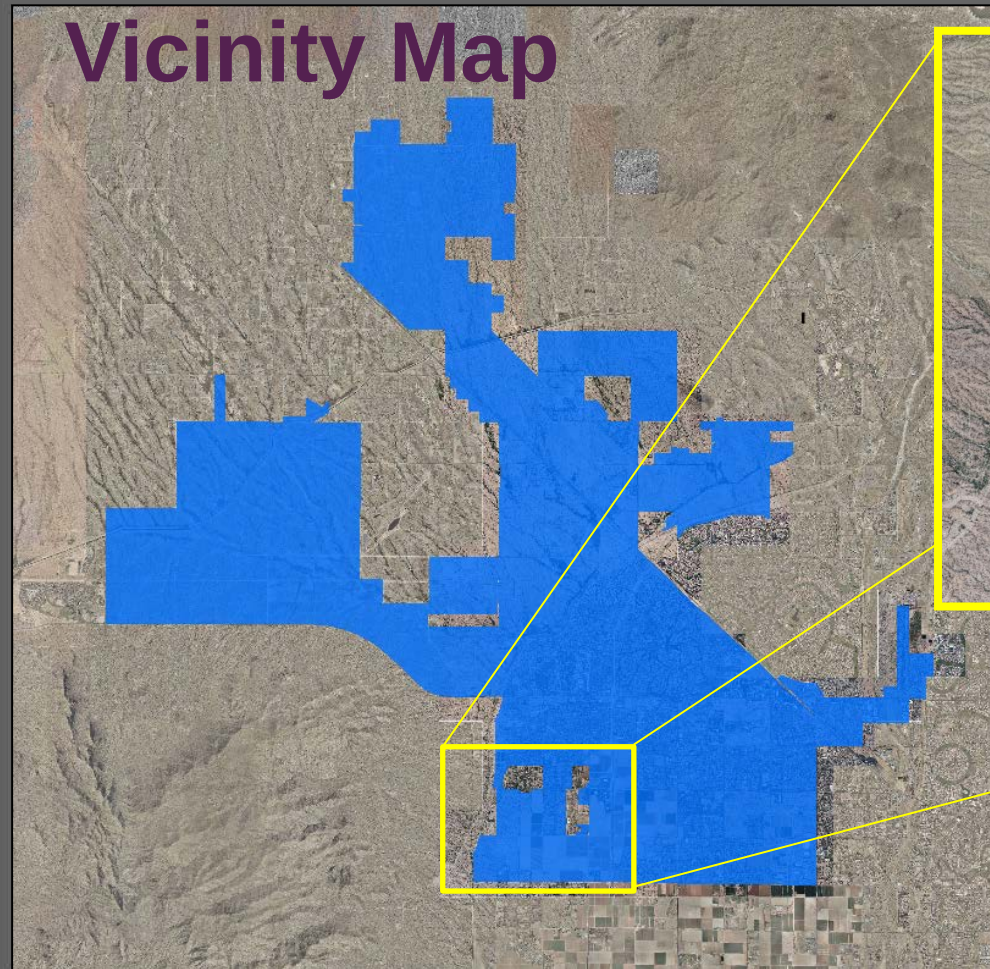
183
184 **Findings:**

- 185
186
 - The proposed annexation meets the statutory requirement for annexation.
 - The proposed annexation is consistent with the Surprise General Plan 2035.
 - The proposed annexation is consistent with the Surprise Unified Development Code.

189
190 **Attachments:**

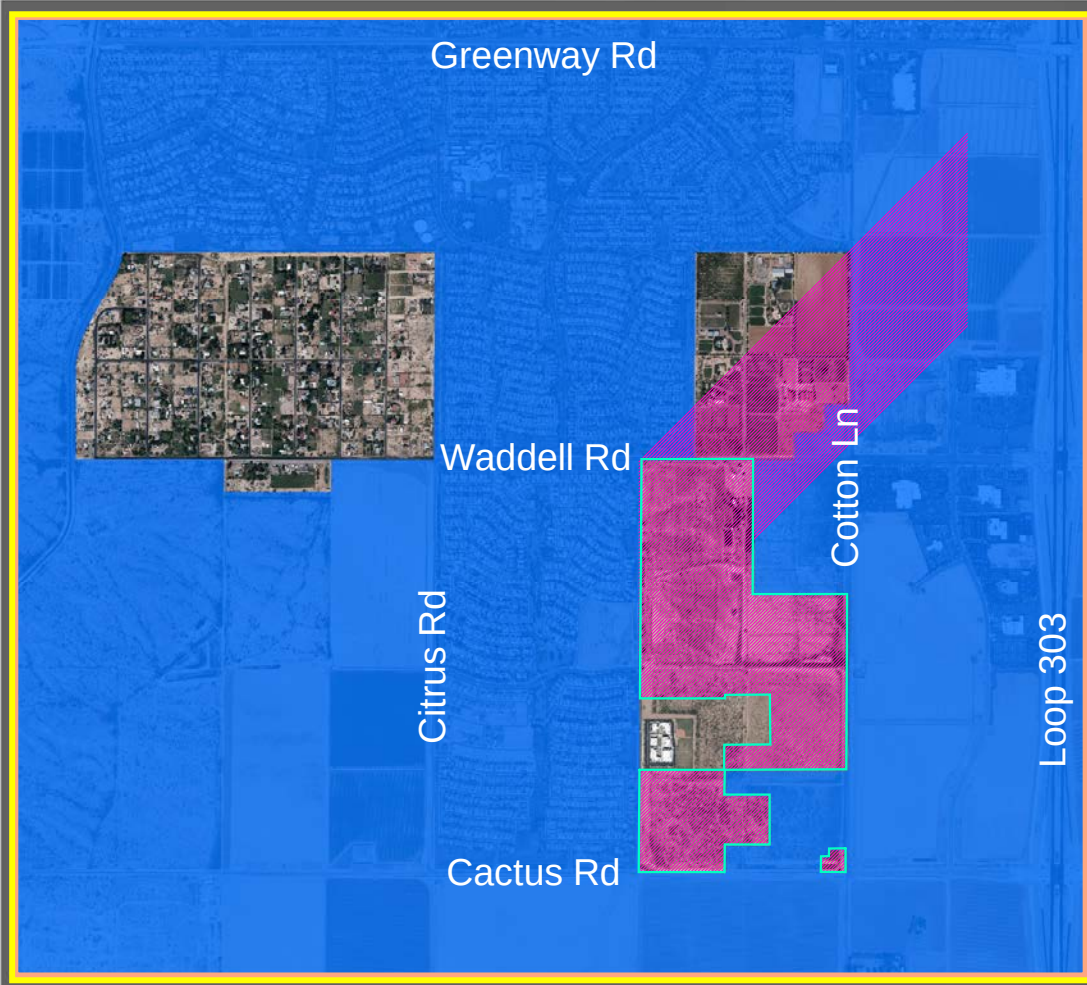
- 191
192 01 Vicinity Map (1 page)
193 02 Case Map (1 page)
194 03 Recorded Blank Annexation Petition (8 pages)
195 04 Public Participation Report Excerpt (6 pages)
196 05 Adopting Ordinance w/ Exhibits (11 pages)
197 06 Financial Impact Analysis Summary (1 page)

Vicinity Map



Existing Surprise
Annexation

FS16-427



Case Map



FS16-427

Unofficial 20 Document

Recording requested by:

City of Surprise
City Clerk's Office
16000 N Civic Center Plaza
Surprise, Arizona 85374

An:
Ga

ANNEXATION PETITION

ANNEXATION PETITION

TO THE HONORABLE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA:

We, the undersigned owners of one-half or more of the real and personal property that also represents one-half or more of the value of the real and personal property in the proposed annexation area that would be subject to taxation by the City of Surprise in the event of annexation, the below described territory being contiguous to the corporate limits of the City of Surprise, with the exterior boundaries of the territory proposed to be annexed shown on the map attached hereto, marked Exhibit "B" and made part hereof, request the City of Surprise to annex the following described territory, provided that the requirements of A.R.S §9-471, and amendments thereto are fully observed.

The description of the territory proposed to be annexed, not already within the present limits of the City of Surprise and located in Maricopa County, Arizona, is as described and attached hereto, marked Exhibit "A" and made part hereof:

DATE	NAME OF PROPERTY OWNER	MAILING ADDRESS	PHONE NO.	PARCEL NUMBER OR LEGAL DESCRIPTION
Unofficial Document				

EXHIBIT "A"**DESCRIPTION****MAGNOLIA ANNEXATION**

Portions of the east halves of Sections 11 and 14, Township 3 North, Range 2 West of the Gila and Salt River Base and Meridian, Maricopa County, Arizona, described as follows:

PARCEL 1

COMMENCING at the South Quarter Corner of said Section 14, being the southeast corner of that real property as described in the City of Surprise Annexation Ordinance # 03-15 as recorded in Instrument 2003-0920269, records of said County, and the southwest corner of Parcel #2 of that real property as described in the City of Surprise Annexation Ordinance #2015-17 as recorded in Instrument 2015-0867344, records of said County, from which the Southeast Corner of said Section 14 lies North 89°49'03" East 2645.36 feet;

Thence along the east line of said Ordinance #03-15 and the west line of said Parcel #2 being also the north-south midsection line of said Section 14, North 00°12'41" East 33.00 feet to the northwest corner of said Parcel #2 and the POINT OF BEGINNING;

Thence continuing along said east line of Ordinance #03-15 and said midsection line North 00°12'41" East 1299.63 feet;

Unofficial Document

Thence departing said lines North 89°49'03" East 1077.68 feet to the most northerly northwest corner of that real property as described in the City of Surprise Annexation Ordinance #2010-12 as recorded in Instrument 2010-0594770, records of said County, being also Point "A" for purposes of this description;

Thence along a west line of said Ordinance #2010-12 South 00°10'57" East 316.90 feet;

Thence along a south line of said Ordinance #2010-12 North 89°49'03" East 575.97 feet;

Thence along a west line of said Ordinance #2010-12 South 00°10'57" East 633.80 feet;

Thence along a north line of said Ordinance #2010-12 South 89°49'03" West 573.52 feet;

Thence along a west line of said Ordinance #2010-12 South 00°10'57" East 348.90 feet to the northeast corner of said Parcel #2;

Thence along the north line of said Parcel #2 South 89°49'03" West 1089.06 feet to the POINT OF BEGINNING.

TOGETHER WITH

DESCRIPTION continued on page 2 of 4

DESCRIPTION continued from page 1 of 4

PARCEL 2

BEGINNING at the aforementioned Point "A"

Thence North 00°10'57" West 316.90 feet;

Thence North 89°49'03" East 584.03 feet;

Thence North 00°10'57" West 633.80 feet;

Thence South 89°49'03" West 570.97 feet;

Thence South 00°10'57" East 44.59 feet;

Thence South 89°48'47" West 1084.52 feet to a point on the north-south midsection line of said Section 14 and the east line of said Ordinance # 03-15;

Thence along said midsection line and said east line North 00°12'41" East 40.45 feet to the south corner of that real property as described in the City of Surprise Annexation Ordinance #08-13, as recorded in Instrument 2008-0397058, records of said County said corner being the beginning of a tangent curve, concave easterly, having a radius of 150.00 feet;

Thence departing said east line and said ^{Unofficial Document} midsection line northerly along the east line of said Ordinance #08-13 and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet;

Thence continuing along said east line North 03°09'43" East 186.55 feet to the beginning of a tangent curve, concave westerly, having a radius of 150.00 feet;

Thence continuing northerly along said east line and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet;

Thence continuing along said east line North 00°12'41" East 354.20 feet to the beginning of a tangent curve, concave westerly having a radius of 150.00 feet;

Thence continuing northerly along said east line and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet;

Thence continuing along said east line North 02°44'21" West 186.54 feet to the beginning of a tangent curve, concave easterly, having a radius of 150.00 feet;

Thence continuing northerly along said east line and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet to the most northerly point of said Ordinance #08-13 and a point on said east line of Ordinance #03-15, being also a point on said mid-section line;

DESCRIPTION continued on page 3 of 4

DESCRIPTION continued from page 2 of 4

Thence northerly along last said east line and said midsection line North 00°12'41" East 2244.24 feet to the North Quarter Corner of said Section 14, being the northeast corner of said Ordinance #03-15, being also a point on the south line of that real property described in the City of Surprise Annexation Ordinance #00-16 as recorded in Instrument 2000-0713570, records of said County;

Thence easterly along the north line of the northeast quarter of said Section 14 and the south line of said Ordinance #00-16, North 89°50'28" East 660.87 feet to the southeast corner of said Ordinance #00-16;

Thence along an east line of said Ordinance #00-16 North 00°13'35" East 33.00 feet;

Thence parallel with and 33.00 feet north of, measured at right angles, the south line of the southeast quarter of said Section 11 North 89°50'29" East 1271.62 feet to a point on the west line of that real property described in the City of Surprise Annexation Ordinance #07-42 as recorded in Instrument 2007-1177274 records of said County;

Thence along said west line South 00°09'26" East 33.00 feet to the southwest corner of said Ordinance #07-42, being also a point on said south line of the southeast quarter of Section 11, said point being also a point on the north line of that real property as described in the City of Surprise Annexation Ordinance #08-31 as recorded in Instrument 2008-0725885, records of said County;

Thence westerly along said south line of the northeast quarter and said north line South 89°50'29" West 510.95 feet to the northwest corner of said Ordinance #08-31;

Thence along the west line of said Ordinance #08-31 South 00°12'17" West 1716.03 feet to the southwest corner of said Ordinance #08-31;

Thence along the south line of said Ordinance #08-31, North 89°50'28" East 1205.36 feet to a point on that real property described in the City of Surprise Annexation Ordinance #08-21 as recorded in Instrument 2008-0498462, records of said County;

Thence along the west line of said Ordinance #08-21 South 00°12'03" West 923.52 feet to a point on the east-west midsection line of said Section 14;

Thence continuing along said west line South 00°10'54" West 1307.79 feet to a point on the north line said Ordinance #2010-12;

Thence along said north line of Ordinance #2010-12 South 89°49'03" West 1550.49 feet to the POINT OF BEGINNING.

TOGETHER WITH

DESCRIPTION continued on page 4 of 4

DESCRIPTION continued from page 3 of 4

PARCEL 3

COMMENCING at the southeast corner of said Section 14;

Thence along the south line of said Section 14 South 89°49'03" West 16.50 feet;

Thence North 00°10'54" East 33.00 feet to the northeast corner of Parcel #1 of said Ordinance 2015-17 and the POINT OF BEGINNING;

Thence along the north line of said Parcel #1 South 89°49'03" West 316.50 feet to the northwest corner of said Parcel #1 being also a point on an east line of said Ordinance #2010-12;

Thence along said east line North 00°10'52" East 200.00 feet;

Thence along a south line of said Ordinance #2010-12 North 89°49'03" East 100.00 feet;

Thence along an east line of said Ordinance #2010-12 North 00°10'52" East 100.00 feet;

Thence along a south line of said Ordinance #2010-12 North 89°49'03" East 216.50 feet to the most northerly southeast corner of said Ordinance #2010-12 being also a point on the west line of that real property as described in the aforementioned Ordinance 08-21;

Thence along said west line South 00°10'54" East 300.00 feet to the POINT OF BEGINNING.

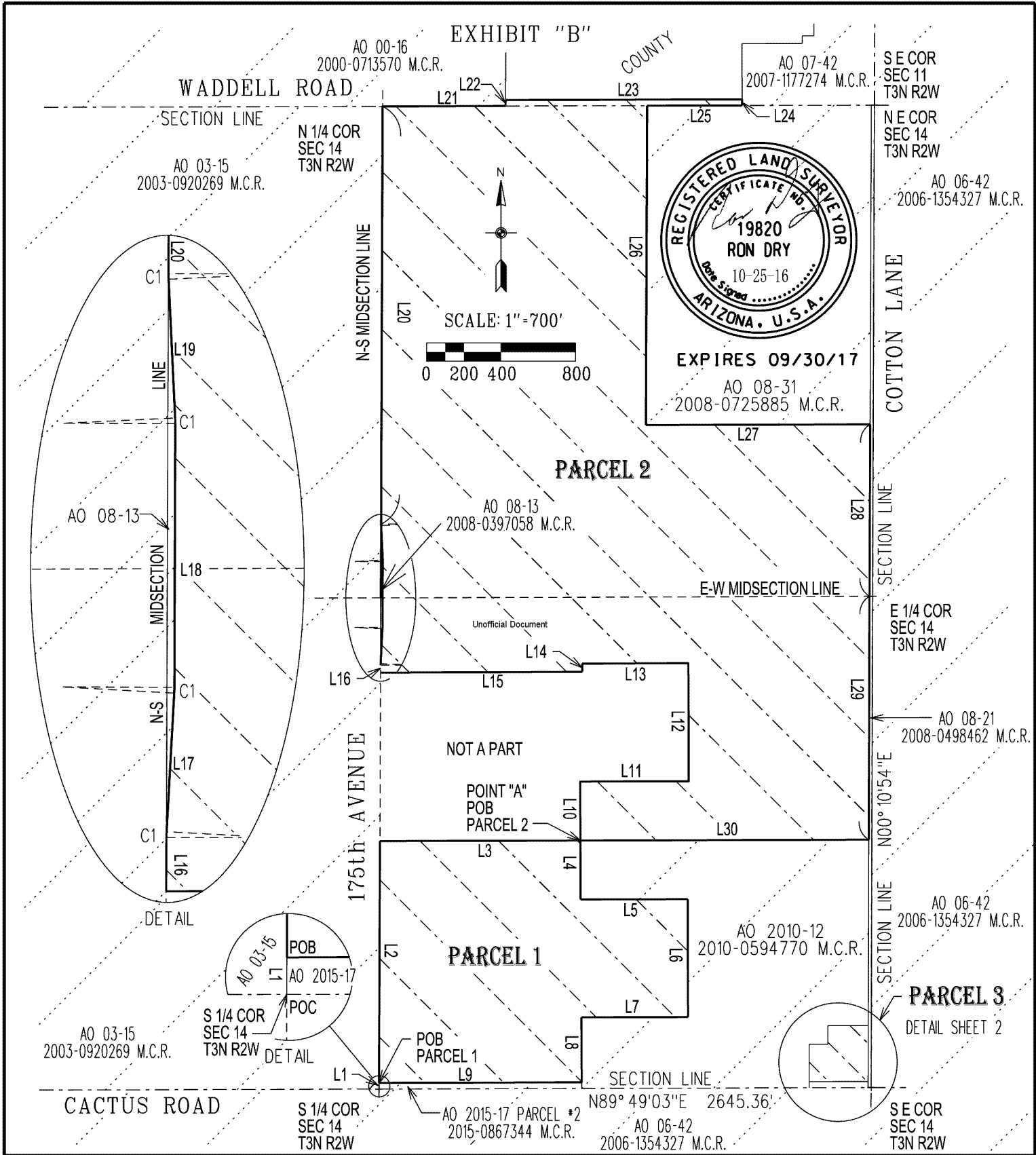
Containing 203.28 acres, more or less.

Attached is Exhibit "B" and by this reference is made a part hereof.

End of description



EXPIRES 09-30-2017



MAGNOLIA ANNEXATION		 CITY OF SURPRISE LAND SURVEY DEPARTMENT	
PROJECT #	16023	DRAWN BY RCD	DATE 10-25-16 SHEET 1 OF 2

EXHIBIT "B"

LINE TABLE

LINE	BEARING	LENGTH
L1	N00° 12'41"E	33.00'
L2	N00° 12'41"E	1299.63'
L3	N89° 49'03"E	1077.68'
L4	S00° 10'57"E	316.90'
L5	N89° 49'03"E	575.97'
L6	S00° 10'57"E	633.80'
L7	S89° 49'03"W	573.52'
L8	S00° 10'57"E	348.90'
L9	S89° 49'03"W	1089.06'
L10	N00° 10'57"W	316.90'
L11	N89° 49'03"E	584.03'
L12	N00° 10'57"W	633.80'
L13	S89° 49'03"W	570.97'

LINE TABLE

LINE	BEARING	LENGTH
L14	S00° 10'57"E	44.59'
L15	S89° 48'47"W	1084.52'
L16	N00° 12'41"E	40.45'
L17	N03° 09'43"E	186.55'
L18	N00° 12'41"E	354.20'
L19	N02° 44'21"W	186.54'
L20	N00° 12'41"E	2244.24'
L21	N89° 50'28"E	660.87'
L22	N00° 13'35"E	33.00'
L23	N89° 50'29"E	1271.62'
L24	S00° 09'26"E	33.00'
L25	S89° 50'29"W	510.95'
L26	S00° 12'17"W	1716.03'

LINE TABLE

LINE	BEARING	LENGTH
L27	N89° 50'28"E	1205.36'
L28	S00° 12'03"W	923.52'
L29	S00° 10'54"W	1307.79'
L30	S89° 49'03"W	1550.49'
L31	S89° 49'03"W	16.50'
L32	N00° 10'54"E	33.00'
L33	S89° 49'03"W	316.50'
L34	N00° 10'52"E	200.00'
L35	N89° 49'03"E	100.00'
L36	N00° 10'52"E	100.00'
L37	N89° 49'03"E	216.50'
L38	S00° 10'54"W	300.00'

CURVE TABLE

CURVE	△	RADIUS	LENGTH
C1	02° 57'02"	150.00'	7.73'

LEGEND

- POC POINT OF COMMENCEMENT
 POB POINT OF BEGINNING
 M.C.R. MARICOPA COUNTY RECORDER
 AO ANNEXATION ORDINANCE



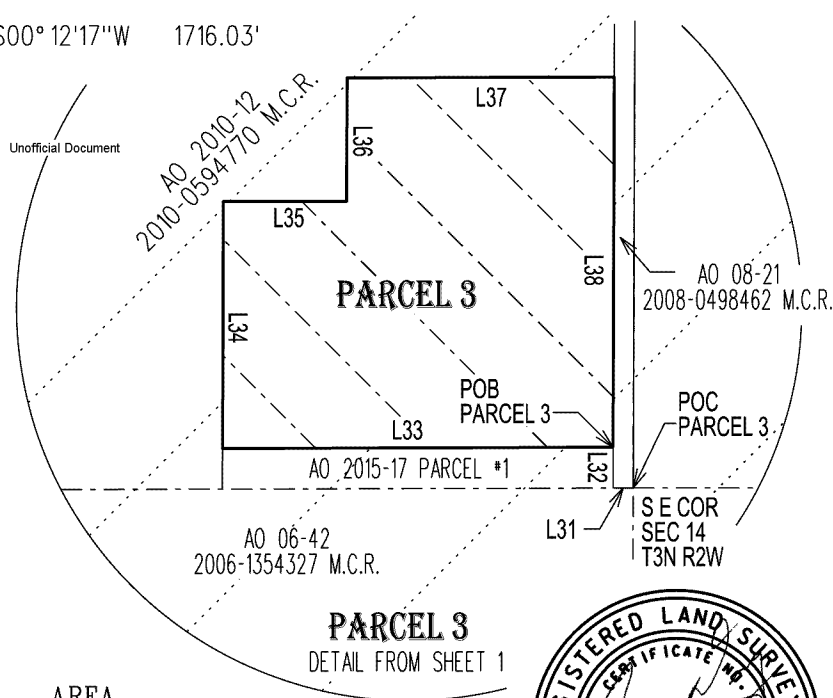
EXISTING CITY OF SURPRISE JURISDICTION



ANNEXATION AREA

BASIS OF BEARINGS

Maricopa County Low Distortion Projection
 Linear unit: International foot
 Geodetic Datum: NAD 1983
 Projection type: Lambert Conformal Conic (single parallel)
 Latitude of origin: 33° 15'00"N
 Central meridian: 112° 15'00" W
 False northing: 1,500,000.000 ift
 False Easting: 2,500,000.000 ift
 Standard parallel scale: 1.000045 (exact)



AREA

PARCEL 1	40.69 ACRES
PARCEL 2	160.64 ACRES
PARCEL 3	1.95 ACRES
TOTAL	203.28 ACRES



EXPIRES 09/30/17

MAGNOLIA ANNEXATION

CITY OF SURPRISE
LAND SURVEY DEPARTMENT

PROJECT # 16023

DRAWN BY RCD

DATE 10-25-16

SHEET 2 OF 2

CITIZEN PARTICIPATION FINAL REPORT

MAGNOLIA & SWEETWATER PLANNED UNIT DEVELOPMENT

PARCEL NUMBERS: 502-04-002P, 502-04-002J, 502-04-004, 502-04-006B, 502-04-006A,
502-04-005D, 502-04-022D, 502-04-002Q, 502-04-002E, 502-04-023C, 502-04-022A,
and 502-04-002R

CITY OF SURPRISE

PREPARED BY:

LVA URBAN DESIGN STUDIO, LLC
120 E. Ash Ave.
Tempe, AZ 85281

November 2016

ANNEXATION, PUD ZONING & PRELIMINARY PLAT
(FS16-427, FS16-391 & FS16-392)

Development Team

Developer

Surprise Village Partners, LLC
c/o AZ Community Development, LLC
Mr. Joseph Kalish and Jack Hilton
11024 N. 28th Dr. Suite 170
Phoenix, AZ 85029
(602) 499-0899

Land Planner

LVA Urban Design Studio, LLC
Mr. Mark Reddie
120 South Ash Avenue
Tempe, Arizona 85281
(480) 994-0994

Civil Engineer

David Evans & Associates
Mr. Don Willie
4600 E. Washington St. Suite 250
Phoenix, AZ 85034
(602) 678-5151

Traffic Engineer

CivTech
Ms. Dawn Cartier
10605 N. Hayden Rd. Suite 140
Scottsdale, AZ 85260
(480) 659-4250

CITIZEN PARTICIPATION FINAL REPORT

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Appendices

- Appendix A: Site Posting Affidavits
- Appendix B: Neighborhood Meeting Notification Letter
- Appendix C: Daily Sun Newspaper Advertisement
- Appendix D: Meeting Exhibits
- Appendix E: Sign in Sheets & Comment Cards
- Appendix F: Scanned E-mail Comments and Responses

I. PUBLIC MEETING INFORMATION

A. Applicant Attendees:

AZ Community Development – Joseph Kalish, Jack Hilton - Owners Representatives

David Evans & Associates – Don Willie – Civil Engineer Representative

CivTech – Dawn Cartier – Traffic Engineer

LVA Urban Design Studio – Mark Reddie, Alisse Highley - Applicant/Planning Consultant

II. PROJECT DESCRIPTION

The proposed applications are requesting a zone change on 178 acres of property currently zoned R1-43 to approximately 78.6 acres of RM-6 PUD, approximately 95.2 acres of RM-9 PUD, approximately 1.8 acres of RH-PUD and approximately 2.4 acres of /CR-PUD. Note that approximately 2.3 acres within the RH-PUD and CR-PUD is in a flex zone which allows the flexibility for either zoning district based on the final site plan configuration. This request includes a PUD Overlay on the entire 178 acres located at the northeast corner of Cactus Road and 175th Avenue. Concurrent with this request, the applicant will be submitting an Annexation application and a Preliminary Plat for the property as well. Note that a companion zoning application and preliminary plat is also being processed for an additional 10-acre property at the southeast corner of 175th Avenue and Sweetwater Avenue. Upon annexation and rezoning, the intent is to include this parcel within the overall Magnolia master planned community. The public outreach activities were conducted for both projects together.

As part of the Annexation and Zoning process, a neighborhood meeting was held on October 19, 2016 as an opportunity for local residents to learn about the project, ask questions, and express their comments or concerns regarding the project.

III. MEETING LOCATION

The neighborhood meeting was held at Sunset Hills Elementary located at 17825 W. Sierra Montana Loop Surprise, Arizona on Wednesday October 19, 2016 from 6:00pm to 7:00pm.

IV. NOTIFICATION

A. REQUIRED SITE POSTING

On October 4, 2016 sixteen notification signs were posted on the subject site informing the surrounding community of the proposed applications and of the neighborhood meeting. These signs will remain in place and continue to be updated as the application advances through to City Council. **Appendix A, *Site Posting Affidavits*** includes photos of the signs, locations, and affidavits.

B. REQUIRED FIRST CLASS MAILINGS

Mailed notification letters were sent from the City of Surprise to 135 property owners and HOAs on October 6, 2016. The letters included a map of the project and details on the neighborhood meeting. A copy of the outreach letter can be found in **Appendix B, *Neighborhood Meeting Notification Letter***.

C. REQUIRED NEWSPAPER ADVERTISEMENT

An advertisement was posted in in the Daily News-Sun on September 30, 2016 with a map and details of the Citizen Review Meeting. A copy of the advertisement can be found in **Appendix C, *Daily Sun Newspaper Advertisement***.

V. PUBLIC MEETING

The applicant team arrived at Sunset Hills Elementary school to set up exhibit boards and sign in/comment card tables. Directional signs were posted in the parking lot and outdoor hallways to direct and notify residents to the meeting room. See **Appendix D, Meeting Exhibits** for a copy of all exhibits presented at the Neighborhood Meeting.

Twenty eight attendees were recorded on the sign-in sheet (See **Appendix E, Sign-In Sheet and Comment Cards**) for the open house style neighborhood meeting. Guests were greeted at the door and encouraged to walk through the exhibits with a member of the development team. Comment cards were provided throughout the meeting. The meeting came to a close at 7:15 pm.

Since the neighborhood meeting, the applicant has followed up and emailed a site plan to the six attendees who left requests via comment card. No responses have been received at this time, but the applicant will continue to accept feedback through the application process. All sent and received e-mails to date have been included with this report as **Appendix F, Scanned E-mail Comments & Responses**.

VI. MEETING PARTICIPANT FEEDBACK

Included as **Appendix E, Sign-In Sheet & Comment Cards** is a copy of all comment cards received from the October 19th meeting. Below is a response tally, brief summary of feedback, and written responses to questions and/or negative feedback in Subsection A below. Outreach response was the result of neighborhood meeting comment cards. Similar comments are grouped together.

RESPONSE TALLY

Positive Feedback – 1

Negative Feedback – 2

Informative/Suggestions/Neutral – 7

SUMMARY OF FEEDBACK

- Encouraging relocation of proposed access on to 175th Ave
- Concern about multi-family being part of the development
- Request for site plan
- Request for continual updates
- In favor of building Sweetwater
- Concern about traffic impacts

A. GENERAL COMMENTS/CONCERNS & RESPONSES

- Eliminating 175th Ave. Access
Applicant Response – A Traffic Impact Analysis was completed as part of the application. Based on the project densities, improvements and proposed mitigation, 175th Avenue is shown to operate at an acceptable level of service.
- Concern about multi-family being included in the development
Applicant Response – Multi-family is not proposed within this development. All residential is single-family detached. This addresses resident concerns regarding this issue.

- Request for Site Plan & Follow up
Applicant Response – Emails from the applicant were sent out October 21, 2016 to those who requested additional information. An open line of communication was offered as well as an attached site plan.
- Increased traffic
Applicant Response – A Traffic Impact Analysis was done as part of the zoning submittal process for both projects. The TIA's have been submitted, revised per comments, and reviewed by staff. The TIA identifies traffic impacts and improvements required to mitigate impacts. While the applicant acknowledged that traffic will increase with the proposed development, various roadway improvements and mitigation will be provided to accommodate the increased traffic in the area. The conclusions of the TIA's indicate that with the proposed improvements and mitigation, all roadways will operate at an acceptable level of service at full build out.

VII. PUBLIC CORRESPONDENCE SUMMARY AND PLAN REVISIONS

The applicant received a phone call in response to the email sent out on October 21, 2016. That call was in reference to clarification on the date of the upcoming public hearings, and the scheduled Annexation public hearing on November 15, 2016. No other correspondence has been received.

No major adjustments were necessary to address resident concerns with the project based on feedback received at the neighborhood meeting and through comment cards. The applicant remains open to resident comments, but believes the current plan does respond to all comments expressed by the residents.

WHEN RECORDED RETURN TO:

City Clerk's Office
City of Surprise
16000 N. Civic Center Plaza
Surprise, AZ 85374

ORDINANCE 2017-01

AN ORDINANCE EXTENDING AND INCREASING THE CORPORATE LIMITS OF THE CITY OF SURPRISE, MARICOPA COUNTY, STATE OF ARIZONA, PURSUANT TO THE PROVISIONS OF ARIZONA REVISED STATUTES TITLE 9, CHAPTER 4, ARTICLE 7 AND AMENDMENTS THERETO, BY ANNEXING THERETO CERTAIN TERRITORY CONTIGUOUS TO THE EXISTING CITY LIMITS OF THE CITY OF SURPRISE, GENERALLY BOUNDED BY COTTON LANE, 175TH AVENUE, WADDELL ROAD AND CACTUS ROAD; AND ESTABLISHING CITY OF SURPRISE ZONING CLASSIFICATIONS.

WHEREAS, a petition in writing, accompanied by a map or plot of said real property, having been filed and presented to the Mayor and council of the City of Surprise, Arizona, signed by the owners of more than one-half in value of the real and personal property and more than one-half of the persons owning real and personal property as would be subject to taxation by the City of Surprise in the event of annexation within the territory and land hereinafter described as shown by the last assessment of said property, which said territory is contiguous to the City of Surprise, and not now embraced within its limits, asking that the property more particularly hereinafter described be annexed to the City of Surprise, and to extend and increase the corporate limits of the City of Surprise so as to embrace the same;

WHEREAS, the Mayor and Council of the City of Surprise, Arizona, are desirous of complying with said petition and extending and increasing the corporate limits of the City of Surprise to include said territory;

WHEREAS, the said petition sets forth a true and correct description of all the exterior boundaries of the entire area proposed to be annexed to the City of Surprise, and had attached thereto at all times an accurate map of the territory desired to be annexed;

WHEREAS, no alterations increasing or reducing the territory sought to be annexed have been made after the said petition had been signed by any owner of real and personal property in such territory;

WHEREAS, the provisions of A.R.S. §9-471, and amendments thereto, have been fully observed; and

WHEREAS, proper and sufficient certification and proof of the foregoing facts are now on file in the office of the City Clerk of the City of Surprise, Arizona, together with a true and correct copy of the original petition referred to herein, which is on file in the office of the county recorder.

WHEREAS, pursuant to A.R.S. § 9-471(L), the Council shall adopt and apply to this area the zoning classification that permits densities and uses no greater than those permitted by the County immediately before annexation.

NOW, THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA, AS FOLLOWS:

SECTION 1. That the territory described in the attached *Exhibits "A" and "B"* is annexed into the City of Surprise, and that the present corporate limits are, extended and increased to include this territory within the City limits:

SECTION 2. That a copy of this ordinance, together with an accurate map of the territory hereby annexed to the City of Surprise, certified by the Mayor of the City of Surprise, shall be recorded in the office of the County Recorder of Maricopa County, Arizona and that a copy of this ordinance shall be provided to the Clerk of the Board of Supervisors of Maricopa County, Arizona.

SECTION 3. That the property described on Exhibit B, Parcels 1 and 2, of this Ordinance, as having Maricopa County zoning of Rural-43 (RU-43), shall be designated with the City of Surprise zoning district of Residential Ranch (RR), upon the effective date of this Ordinance.

SECTION 4. That the property described on Exhibit B, Parcel 3, of this Ordinance, with Maricopa County zoning of C-3, shall be designated with City of Surprise zoning district of Regional Commercial (CR), upon the effective date of this Ordinance.

SECTION 5. That the City of Surprise zoning map is herewith amended to reflect the property and zoning districts adopted in Sections 3 and 4, above.

SECTION 6. This Ordinance shall take effect, and the annexation of the subject property shall become final thirty days after this Ordinance is adopted.

PASSED AND ADOPTED this _____ day of _____, 2017.

Sharon R. Wolcott, Mayor

Attest:

Approved as to form:

Sherry Aguilar, City Clerk

Robert Wingo, City Attorney

CERTIFICATION OF MAP

MAP OF AREA TO BE ANNEXED

I, _____, Mayor of the City of Surprise, Arizona, do hereby certify that the foregoing legal description and map as expressed in attached Exhibits "A" and "B" is a true and correct depiction of the territory annexed under and by virtue of the petition of the real and personal property owners in the said territory and by Ordinance No. _____, annexing the territory described in Ordinance No. _____ and as shown on said map as a part of the territory to be included within the corporate limits of the City of Surprise, Arizona.

Mayor

ATTEST:

Clerk

EXHIBIT "A"

DESCRIPTION

MAGNOLIA ANNEXATION

Portions of the east halves of Sections 11 and 14, Township 3 North, Range 2 West of the Gila and Salt River Base and Meridian, Maricopa County, Arizona, described as follows:

PARCEL 1

COMMENCING at the South Quarter Corner of said Section 14, being the southeast corner of that real property as described in the City of Surprise Annexation Ordinance # 03-15 as recorded in Instrument 2003-0920269, records of said County, and the southwest corner of Parcel #2 of that real property as described in the City of Surprise Annexation Ordinance #2015-17 as recorded in Instrument 2015-0867344, records of said County, from which the Southeast Corner of said Section 14 lies North 89°49'03" East 2645.36 feet;

Thence along the east line of said Ordinance #03-15 and the west line of said Parcel #2 being also the north-south midsection line of said Section 14, North 00°12'41" East 33.00 feet to the northwest corner of said Parcel #2 and the POINT OF BEGINNING;

Thence continuing along said east line of Ordinance #03-15 and said midsection line North 00°12'41" East 1299.63 feet;

Thence departing said lines North 89°49'03" East 1077.68 feet to the most northerly northwest corner of that real property as described in the City of Surprise Annexation Ordinance #2010-12 as recorded in Instrument 2010-0594770, records of said County, being also Point "A" for purposes of this description;

Thence along a west line of said Ordinance #2010-12 South 00°10'57" East 316.90 feet;

Thence along a south line of said Ordinance #2010-12 North 89°49'03" East 575.97 feet;

Thence along a west line of said Ordinance #2010-12 South 00°10'57" East 633.80 feet;

Thence along a north line of said Ordinance #2010-12 South 89°49'03" West 573.52 feet;

Thence along a west line of said Ordinance #2010-12 South 00°10'57" East 348.90 feet to the northeast corner of said Parcel #2;

Thence along the north line of said Parcel #2 South 89°49'03" West 1089.06 feet to the POINT OF BEGINNING.

TOGETHER WITH

DESCRIPTION continued on page 2 of 4

DESCRIPTION continued from page 1 of 4

PARCEL 2

BEGINNING at the aforementioned Point "A"

Thence North 00°10'57" West 316.90 feet;

Thence North 89°49'03" East 584.03 feet;

Thence North 00°10'57" West 633.80 feet;

Thence South 89°49'03" West 570.97 feet;

Thence South 00°10'57" East 44.59 feet;

Thence South 89°48'47" West 1084.52 feet to a point on the north-south midsection line of said Section 14 and the east line of said Ordinance # 03-15;

Thence along said midsection line and said east line North 00°12'41" East 40.45 feet to the south corner of that real property as described in the City of Surprise Annexation Ordinance #08-13, as recorded in Instrument 2008-0397058, records of said County said corner being the beginning of a tangent curve, concave easterly, having a radius of 150.00 feet;

Thence departing said east line and said mid-section line northerly along the east line of said Ordinance #08-13 and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet;

Thence continuing along said east line North 03°09'43" East 186.55 feet to the beginning of a tangent curve, concave westerly, having a radius of 150.00 feet;

Thence continuing northerly along said east line and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet;

Thence continuing along said east line North 00°12'41" East 354.20 feet to the beginning of a tangent curve, concave westerly having a radius of 150.00 feet;

Thence continuing northerly along said east line and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet;

Thence continuing along said east line North 02°44'21" West 186.54 feet to the beginning of a tangent curve, concave easterly, having a radius of 150.00 feet;

Thence continuing northerly along said east line and the arc of said curve through a central angle of 02°57'02" a distance of 7.73 feet to the most northerly point of said Ordinance #08-13 and a point on said east line of Ordinance #03-15, being also a point on said mid-section line;

DESCRIPTION continued on page 3 of 4

DESCRIPTION continued from page 2 of 4

Thence northerly along last said east line and said midsection line North 00°12'41" East 2244.24 feet to the North Quarter Corner of said Section 14, being the northeast corner of said Ordinance #03-15, being also a point on the south line of that real property described in the City of Surprise Annexation Ordinance #00-16 as recorded in Instrument 2000-0713570, records of said County;

Thence easterly along the north line of the northeast quarter of said Section 14 and the south line of said Ordinance #00-16, North 89°50'28" East 660.87 feet to the southeast corner of said Ordinance #00-16;

Thence along an east line of said Ordinance #00-16 North 00°13'35" East 33.00 feet;

Thence parallel with and 33.00 feet north of, measured at right angles, the south line of the southeast quarter of said Section 11 North 89°50'29" East 1271.62 feet to a point on the west line of that real property described in the City of Surprise Annexation Ordinance #07-42 as recorded in Instrument 2007-1177274 records of said County;

Thence along said west line South 00°09'26" East 33.00 feet to the southwest corner of said Ordinance #07-42, being also a point on said south line of the southeast quarter of Section 11, said point being also a point on the north line of that real property as described in the City of Surprise Annexation Ordinance #08-31 as recorded in Instrument 2008-0725885, records of said County;

Thence westerly along said south line of the southeast quarter and said north line South 89°50'29" West 510.95 feet to the northwest corner of said Ordinance #08-31;

Thence along the west line of said Ordinance #08-31 South 00°12'17" West 1716.03 feet to the southwest corner of said Ordinance #08-31;

Thence along the south line of said Ordinance #08-31, North 89°50'28" East 1205.36 feet to a point on that real property described in the City of Surprise Annexation Ordinance #08-21 as recorded in Instrument 2008-0498462, records of said County;

Thence along the west line of said Ordinance #08-21 South 00°12'03" West 923.52 feet to a point on the east-west midsection line of said Section 14;

Thence continuing along said west line South 00°10'54" West 1307.79 feet to a point on the north line said Ordinance #2010-12;

Thence along said north line of Ordinance #2010-12 South 89°49'03" West 1550.49 feet to the POINT OF BEGINNING.

TOGETHER WITH

DESCRIPTION continued on page 4 of 4

DESCRIPTION continued from page 3 of 4

PARCEL 3

COMMENCING at the southeast corner of said Section 14;

Thence along the south line of said Section 14 South 89°49'03" West 16.50 feet;

Thence North 00°10'54" East 33.00 feet to the northeast corner of Parcel #1 of said Ordinance 2015-17 and the POINT OF BEGINNING;

Thence along the north line of said Parcel #1 South 89°49'03" West 316.50 feet to the northwest corner of said Parcel #1 being also a point on an east line of said Ordinance #2010-12;

Thence along said east line North 00°10'52" East 200.00 feet;

Thence along a south line of said Ordinance #2010-12 North 89°49'03" East 100.00 feet;

Thence along an east line of said Ordinance #2010-12 North 00°10'52" East 100.00 feet;

Thence along a south line of said Ordinance #2010-12 North 89°49'03" East 216.50 feet to the most northerly southeast corner of said Ordinance #2010-12 being also a point on the west line of that real property as described in the aforementioned Ordinance 08-21;

Thence along said west line South 00°10'54" West 300.00 feet to the POINT OF BEGINNING.

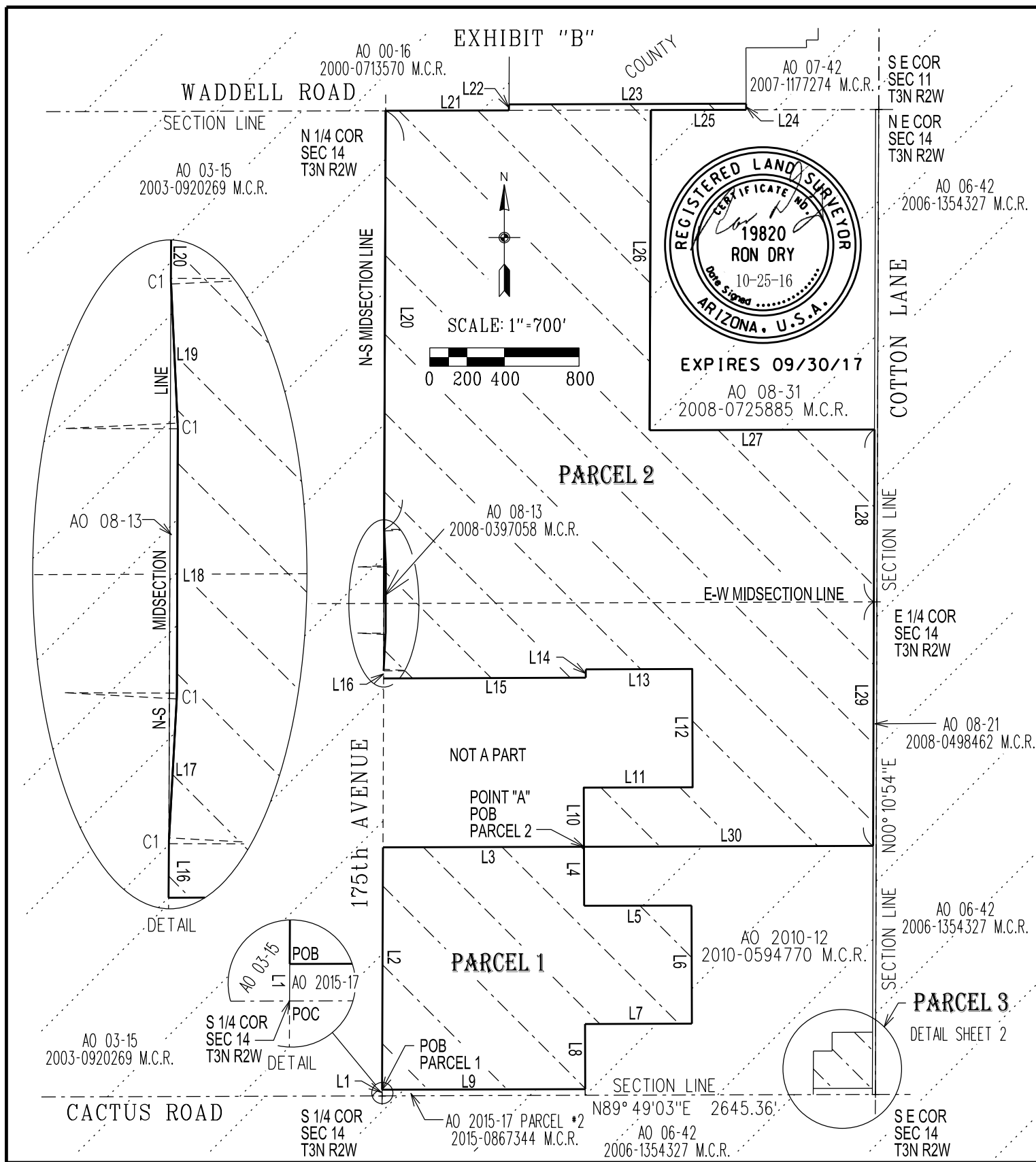
Containing 203.28 acres, more or less.

Attached is Exhibit "B" and by this reference is made a part hereof.

End of description



EXPIRES 09-30-2017



MAGNOLIA ANNEXATION



CITY OF SURPRISE
LAND SURVEY DEPARTMENT

PROJECT # 16023

DRAWN BY RCD

DATE 10-25-16

SHEET 1 OF 2

EXHIBIT "B"

LINE TABLE

LINE	BEARING	LENGTH
L1	N00° 12'41"E	33.00'
L2	N00° 12'41"E	1299.63'
L3	N89° 49'03"E	1077.68'
L4	S00° 10'57"E	316.90'
L5	N89° 49'03"E	575.97'
L6	S00° 10'57"E	633.80'
L7	S89° 49'03"W	573.52'
L8	S00° 10'57"E	348.90'
L9	S89° 49'03"W	1089.06'
L10	N00° 10'57"W	316.90'
L11	N89° 49'03"E	584.03'
L12	N00° 10'57"W	633.80'
L13	S89° 49'03"W	570.97'

LINE TABLE

LINE	BEARING	LENGTH
L14	S00° 10'57"E	44.59'
L15	S89° 48'47"W	1084.52'
L16	N00° 12'41"E	40.45'
L17	N03° 09'43"E	186.55'
L18	N00° 12'41"E	354.20'
L19	N02° 44'21"W	186.54'
L20	N00° 12'41"E	2244.24'
L21	N89° 50'28"E	660.87'
L22	N00° 13'35"E	33.00'
L23	N89° 50'29"E	1271.62'
L24	S00° 09'26"E	33.00'
L25	S89° 50'29"W	510.95'
L26	S00° 12'17"W	1716.03'

LINE TABLE

LINE	BEARING	LENGTH
L27	N89° 50'28"E	1205.36'
L28	S00° 12'03"W	923.52'
L29	S00° 10'54"W	1307.79'
L30	S89° 49'03"W	1550.49'
L31	S89° 49'03"W	16.50'
L32	N00° 10'54"E	33.00'
L33	S89° 49'03"W	316.50'
L34	N00° 10'52"E	200.00'
L35	N89° 49'03"E	100.00'
L36	N00° 10'52"E	100.00'
L37	N89° 49'03"E	216.50'
L38	S00° 10'54"W	300.00'

CURVE TABLE

CURVE	△	RADIUS	LENGTH
C1	02° 57'02"	150.00'	7.73'

LEGEND

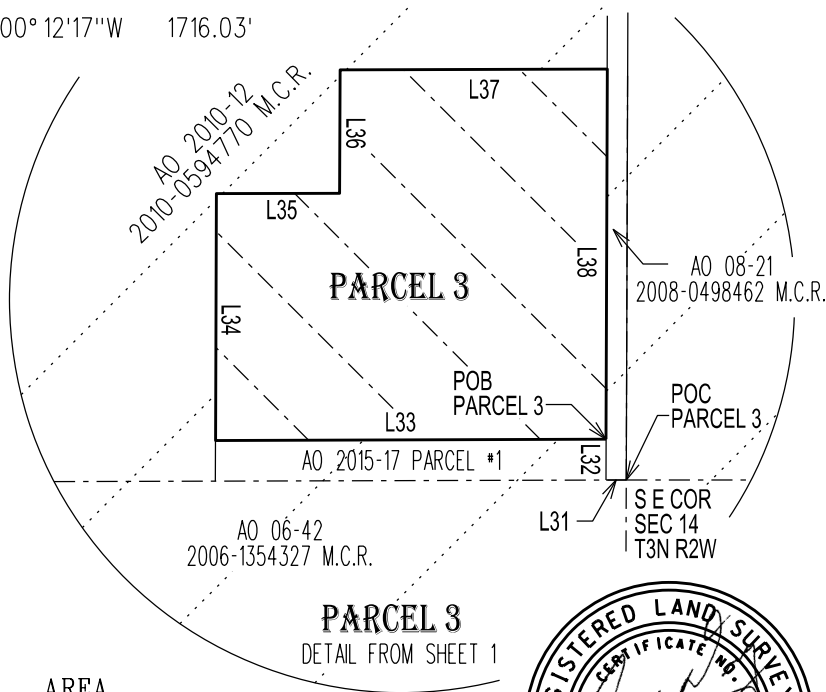
- POC POINT OF COMMENCEMENT
 POB POINT OF BEGINNING
 M.C.R. MARICOPA COUNTY RECORDER
 AO ANNEXATION ORDINANCE
 EXISTING CITY OF SURPRISE JURISDICTION
 ANNEXATION AREA

BASIS OF BEARINGS

Maricopa County Low Distortion Projection
 Linear unit: International foot
 Geodetic Datum: NAD 1983
 Projection type: Lambert Conformal Conic (single parallel)
 Latitude of origin: 33° 15'00"N
 Central meridian: 112° 15'00" W
 False northing: 1,500,000.000 ift
 False Easting: 2,500,000.000 ift
 Standard parallel scale: 1.000045 (exact)

AREA

PARCEL 1	40.69 ACRES
PARCEL 2	160.64 ACRES
PARCEL 3	1.95 ACRES
TOTAL	203.28 ACRES



EXPIRES 09/30/17

MAGNOLIA ANNEXATION



CITY OF SURPRISE
 LAND SURVEY DEPARTMENT

PROJECT # 16023

DRAWN BY RCD

DATE 10-25-16

SHEET 2 OF 2



Memorandum

To: Robert Kuhfuss, Planner II
From: Jared Askelson, Assistant Finance Director
Date: December 22, 2016
Re: FS16-427 Magnolia
Land Use Impact Analysis

A land use based economic impact analysis has been conducted utilizing data provided by the applicant. The data provided assumes development of approximately 203.28 acres within the boundaries of Waddell Road, Cotton Lane, Cactus Road, and 175th Avenue. The development is primarily medium density residential with some rural residential and agricultural and a minimal amount of regional commercial and high density residential acreage.

Based on the land use information, the construction timeline, and the development assumptions, the net financial impact to the operating funds of the city of Surprise is negative. Expenses in the operating funds are estimated to be greater than revenues by approximately \$8,851,300 over the twenty years, an average of approximately \$442,600 annually. The net impact to the enterprise funds is positive; estimated at approximately \$1,387,200 over twenty years, an average of approximately \$69,400 annually.

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: Magnolia Annexation

OVERALL PUBLIC INVOLVEMENT LEVEL:

This activity will follow the citizen outreach and public hearing notification processes as outlined in state statute and the SUDC.

IDENTIFY STAKEHOLDERS:

Impacted residents; schools; churches; businesses; public at-large; property owners?

OBJECTIVES:

What is the purpose of the project/service/program and why is it needed? What are the impacts if the project/service/program is not achieved?

PUBLIC ENGAGEMENT STRATEGIES & TOOLS:

Public Engagement & Project timeline:

Public outreach time frame (when to when)

Future Council Work Session/Meetings target dates

Election dates (if applicable)

Project start/completion dates

Communication Tools and Technique options: (which do you plan to use?)

- ☐ Press releases
- ☐ Public meetings (video/photos, poster boards, fact sheet(s) *do you need Spanish version?)
- ☐ Presentations to boards and commissions, other interested community partners/stakeholders
- ☐ Third-party consultant/moderator (pending budget)
- ☐ Survey (online/paper/both?)
- ☐ Social media
- ☐ Surprise 11
- ☐ Notify Me email/ Council newsletters (opt-in audience)
- ☐ Paid advertising (pending budget)
- ☐ Surprise Progress (mailed quarterly and tied to print deadlines)
- ☐ Booth at city events
- ☐ Paid mailings (pending budget)
- ☐ Creation of a subcommittee/task force
- ☐ Youth/adult activities, registration, or orientation (HOA Academy)
- ☐ Website updates



S U R P R I S E

ARIZONA

City Council

January 17, 2017



175th & Sweetwater



FS16-427

- ✓ Annexation

FS16-391 175th & Sweetwater

- ✓ Zone Change
- ✓ Preliminary Plat

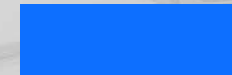
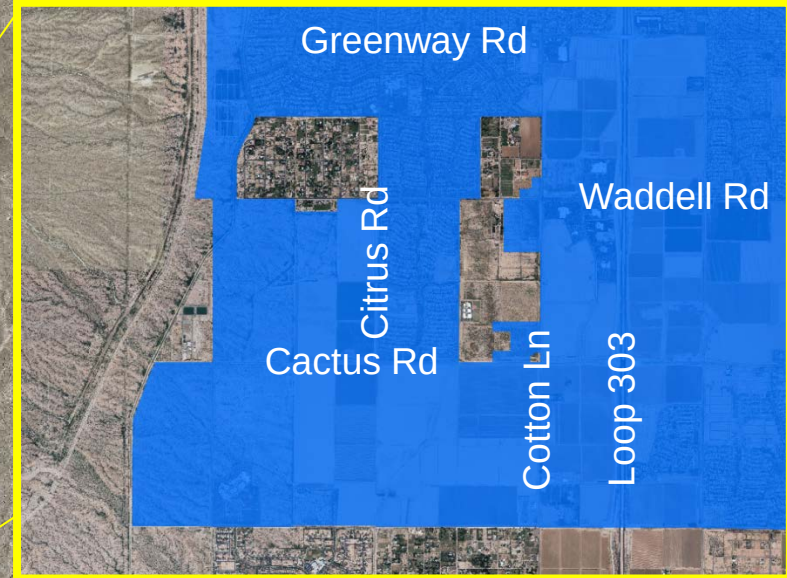
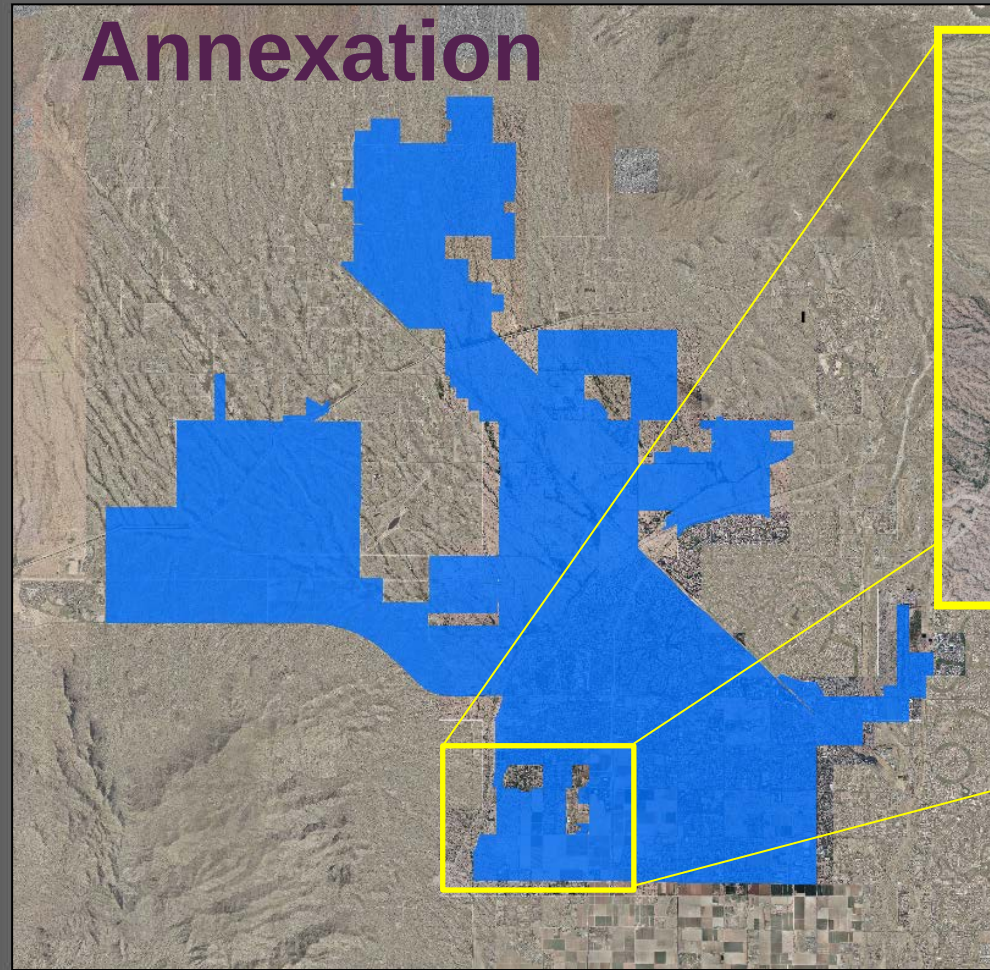
FS16-392 Magnolia

- ✓ Zone Change
- ✓ Preliminary Plat



175th & Sweetwater

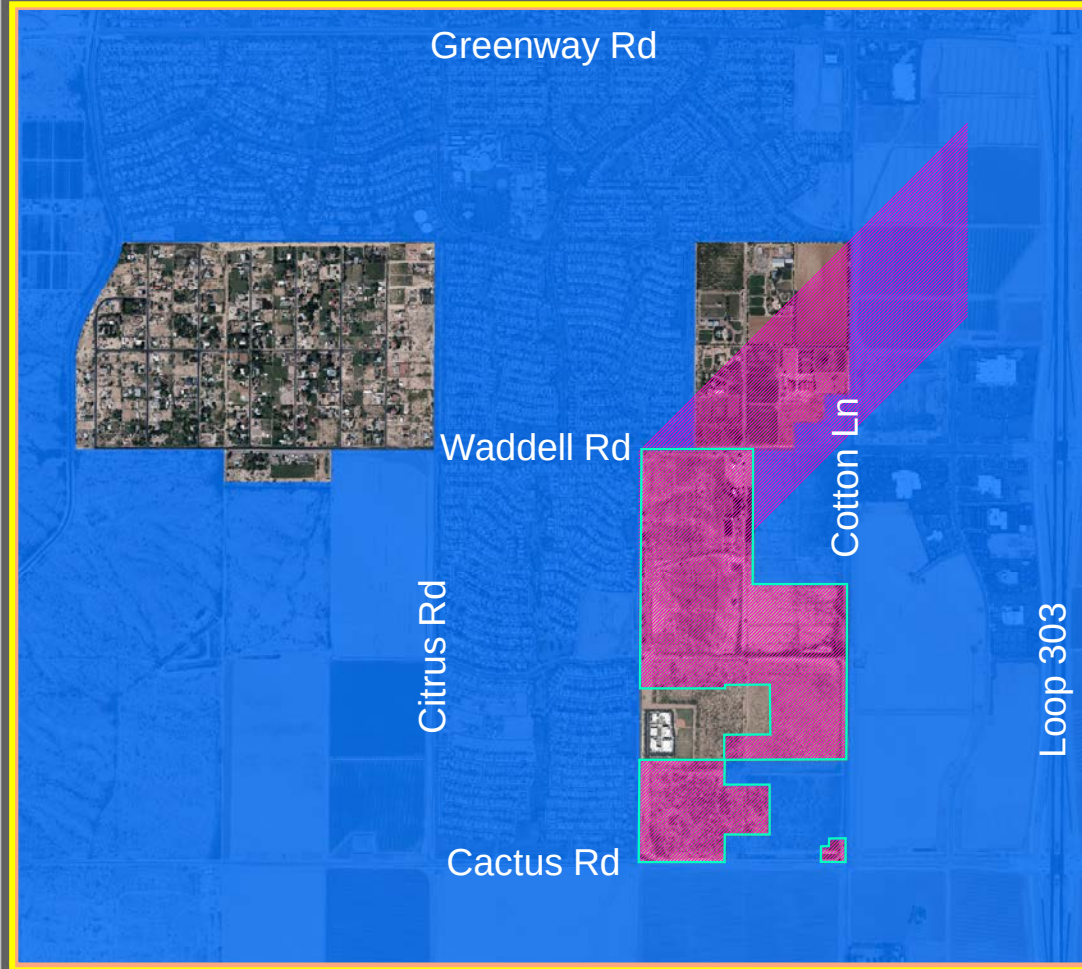
Annexation



Existing Surprise
Annexation

FS16-427

Annexation



FS16-427

Greenway Rd

Waddell Rd

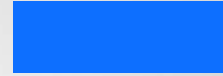
Citrus Rd

Cactus Rd

Cotton Ln

Loop 303

Annexation



Existing Surprise
Annexation

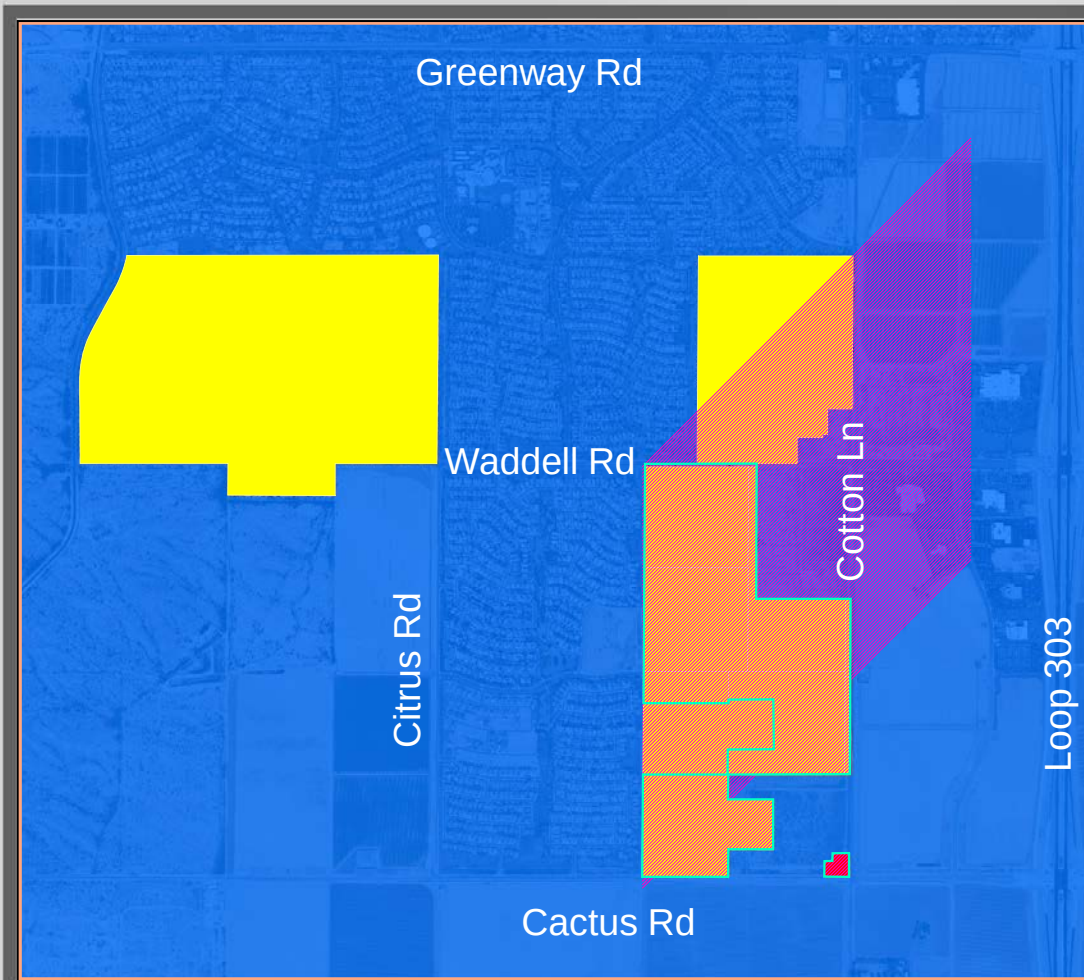


Existing County
RU-43 Zoning

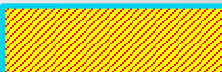
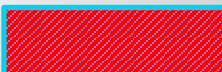


Existing County
C3 Zoning

FS16-427



Annexation

-  Existing Surprise Annexation
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning

FS16-427

Financial Impact Analysis

➤ Operating Funds

- Negative impact
- Expenses greater than revenue by \$8,851,300 over 20 years
- \$442,600 annually

➤ Enterprise Funds

- Positive Impact
- \$1,387,200 over 20 years
- \$69,400 annually

FS16-427

Alternative Actions:

- **Approve** the Annexation
- **Deny** the Annexation



Zone Changes:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia

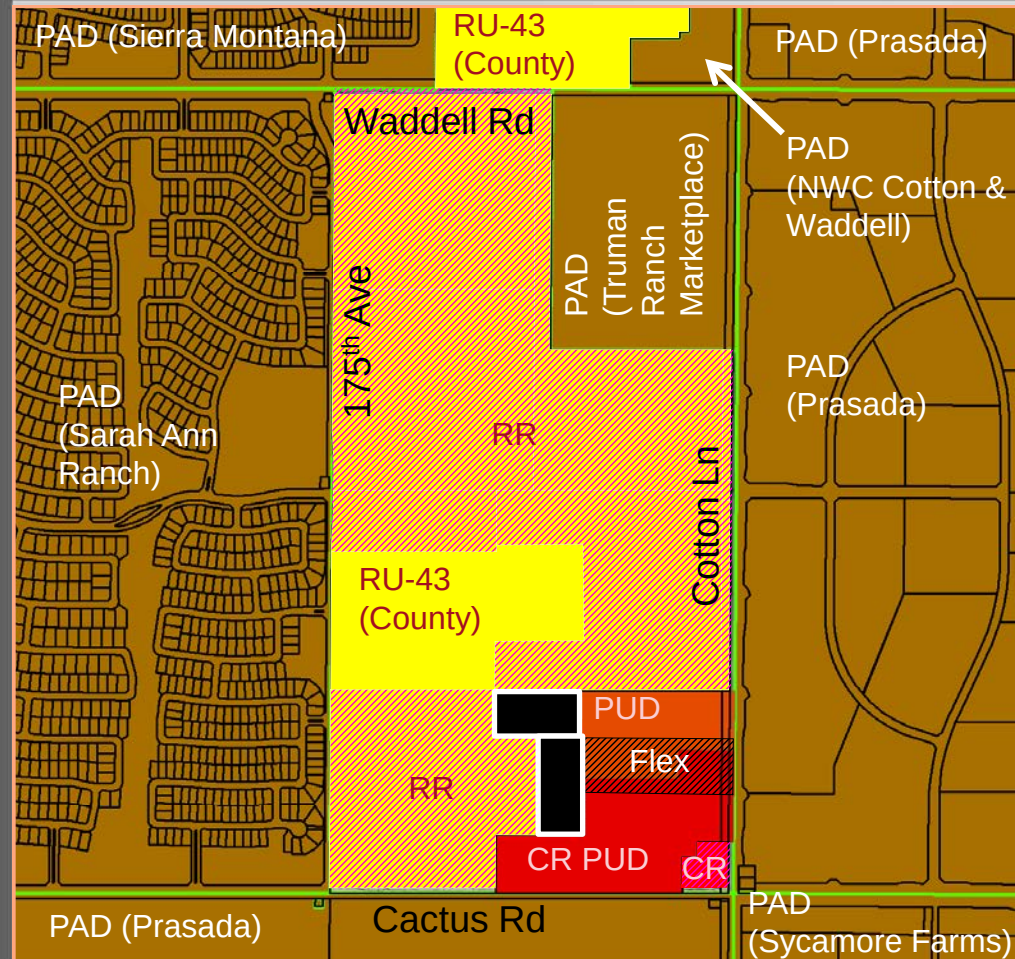


Zone Changes:

1st Zone Change Request:

➤ FS16-392 Magnolia

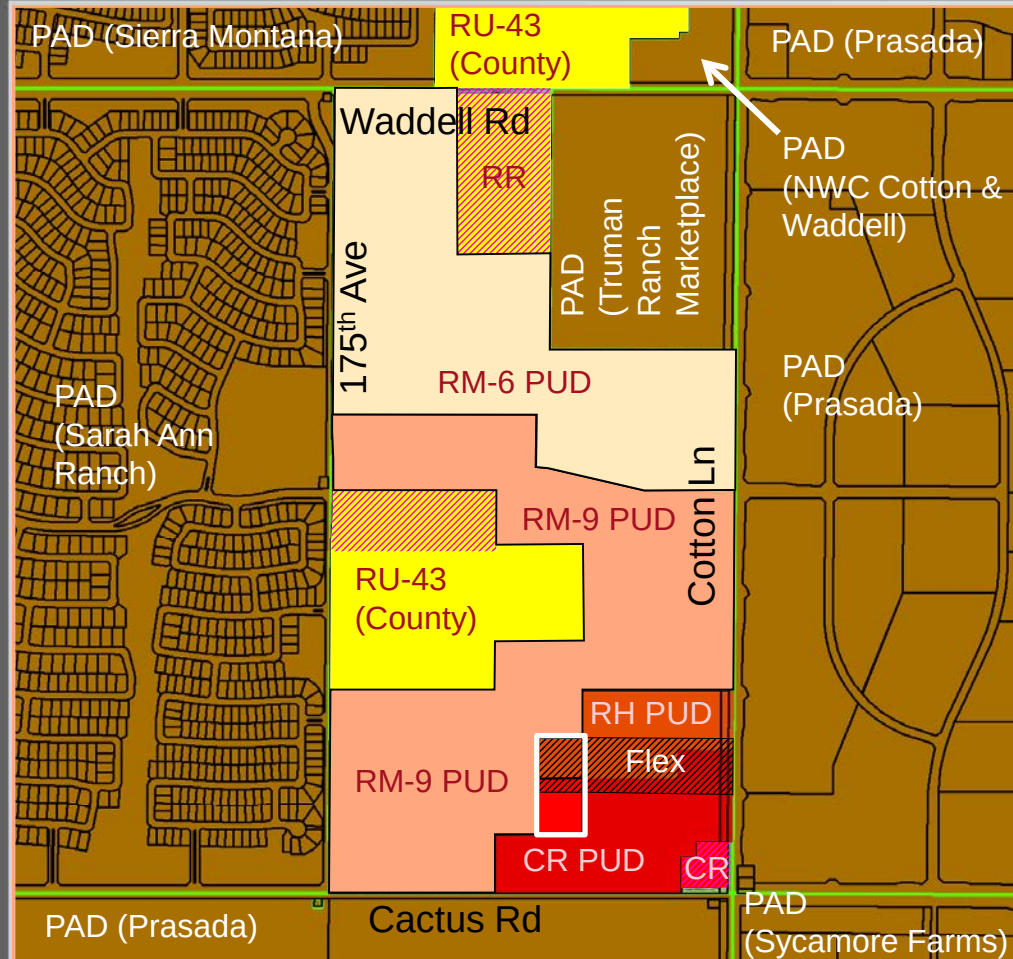




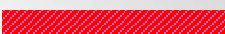
Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning*
- Post-Annexation Surprise CR Zoning*
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning

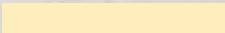
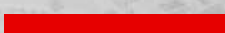
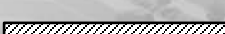
*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning



-  Proposed RM-9 PUD Zoning
-  Proposed RM-6 PUD Zoning
-  Proposed RH PUD Zoning
-  Proposed CR PUD Zoning
-  Proposed CR PUD / RH PUD Flex Zoning

Zone Change



FS16-392

Table 1: RM-6 FUD and RM-9 FUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 FUD Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a FUE, in which case the minimum front setback for RM-9 shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.
- (4) For RM-6 FUD, single-story minimum setback is 15', and two-story minimum setback is 20'.
- (5) For cluster product in the RM-9 FUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.





PRIMARY ENTRY MONUMENT



ENTRY FEATURE IN MEDIAN



PRIMARY ENTRY PLAN VIEW (COTTON LANE & SWEETWATER AVE)

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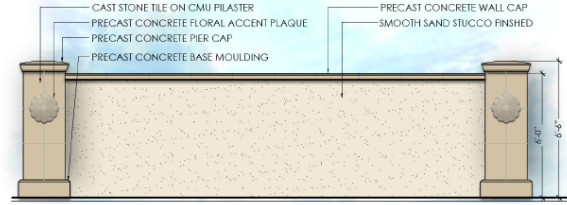
MAGNOLIA

FIGURE 6: COMMUNITY ENTRY MONUMENT

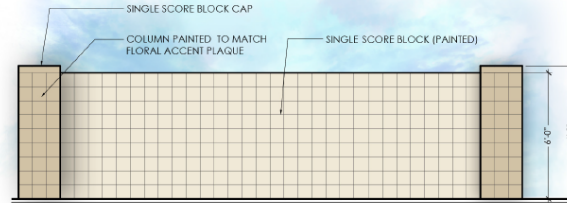
1640

DRAWN BY: PR

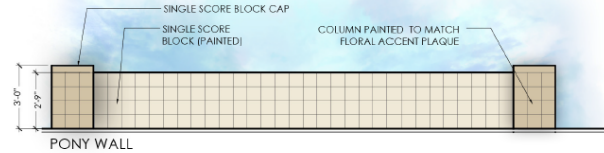
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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 6 COMMUNITY ENTRY MONUMENT.dwg Sep 7, 2016



ENHANCED THEME WALL



THEME WALL



PONY WALL

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FIGURE 7: WALL DETAILS

APPROX. SCALES

1640

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11/16/16

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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



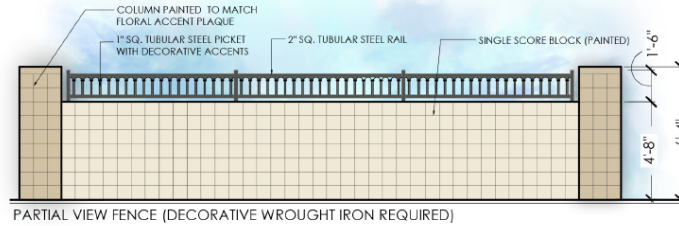
FS16-392

Monuments and Walls

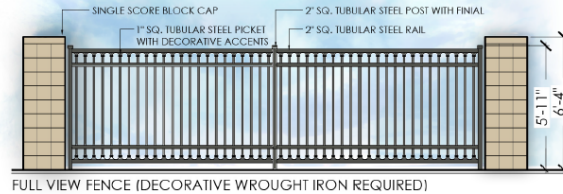


FS16-392

Monuments and Walls



PARTIAL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)



FULL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)

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MAGNOLIA

FIGURE 7A: WALL DETAILS

APPROX. SCALE(S)

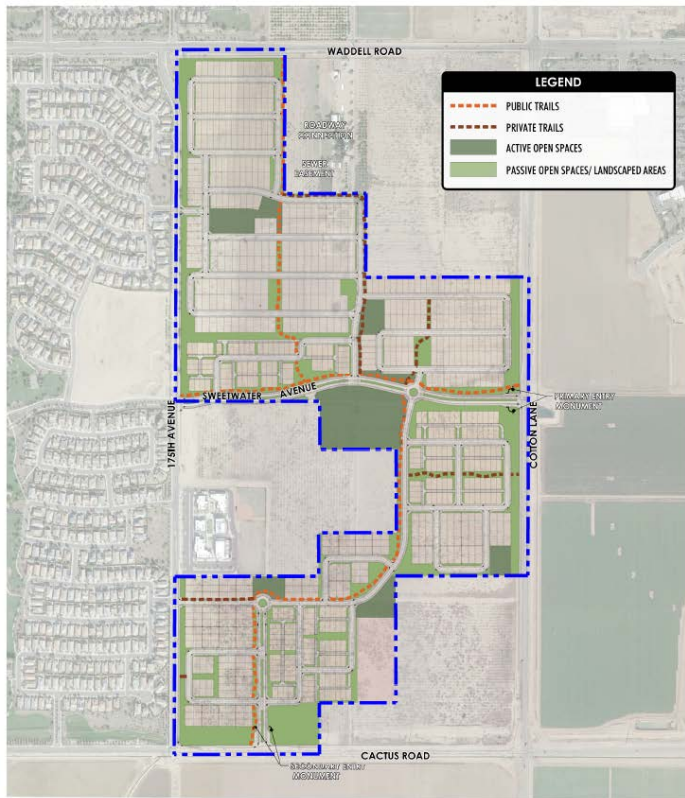
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DRAWN BY: PE



11/0/16

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6/1/16 MAGNOLIA/CD/PLANNING/LVA-1600 FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

1640 DRAIN BY: PR



11/2/14

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 U:\1040-MAGNOLIA\CD\PLANNING\1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2015



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175TH & SWEETWATER

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

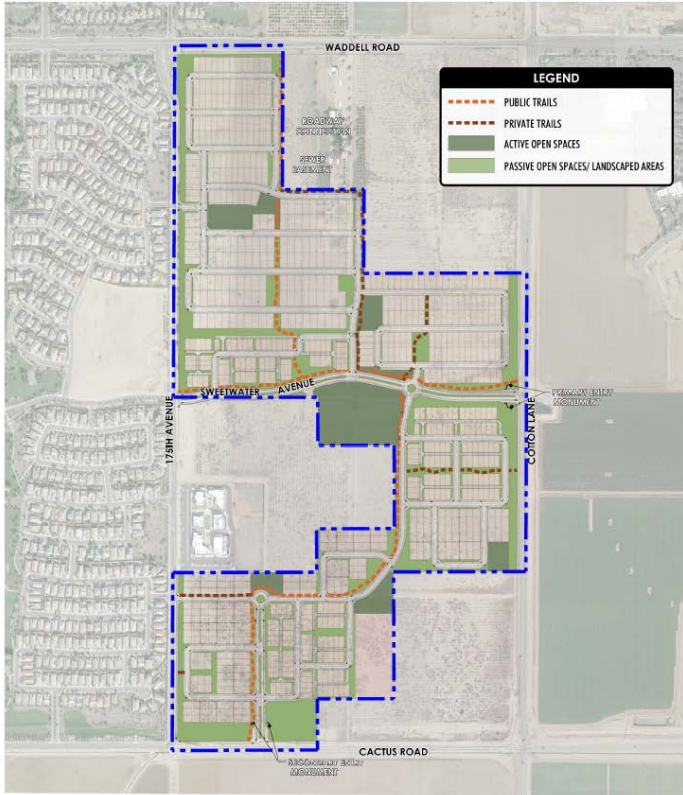
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11/2/14

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 U:\1040-MAGNOLIA\CD\PLANNING\1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2015

Amenities



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MAGNOLIA

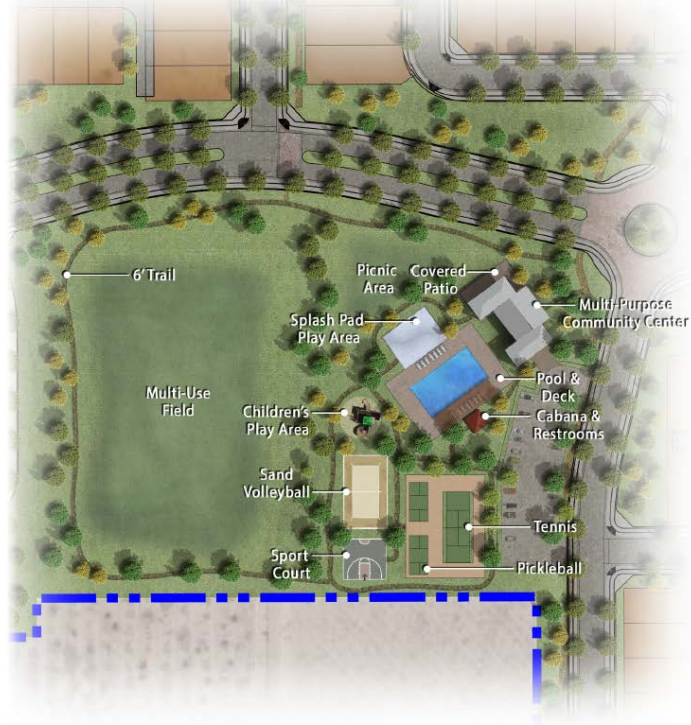
FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE(S)

1640 DRAWN BY: PR



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U:\1640-MAGNOLIA\LAND PLANNING\1640-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Rev 2, 2015



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MAGNOLIA

FIGURE 5: TRUMAN COMMUNITY CENTER SKETCH CONCEPT

APPROX. SCALE(S)

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U:\1640-MAGNOLIA\LAND PLANNING\1640-FIGURE 5-TRUMAN COMMUNITY CENTER SKETCH.dwg Aug 30, 2015



FS16-392

Amenities

Commission Recommendation:

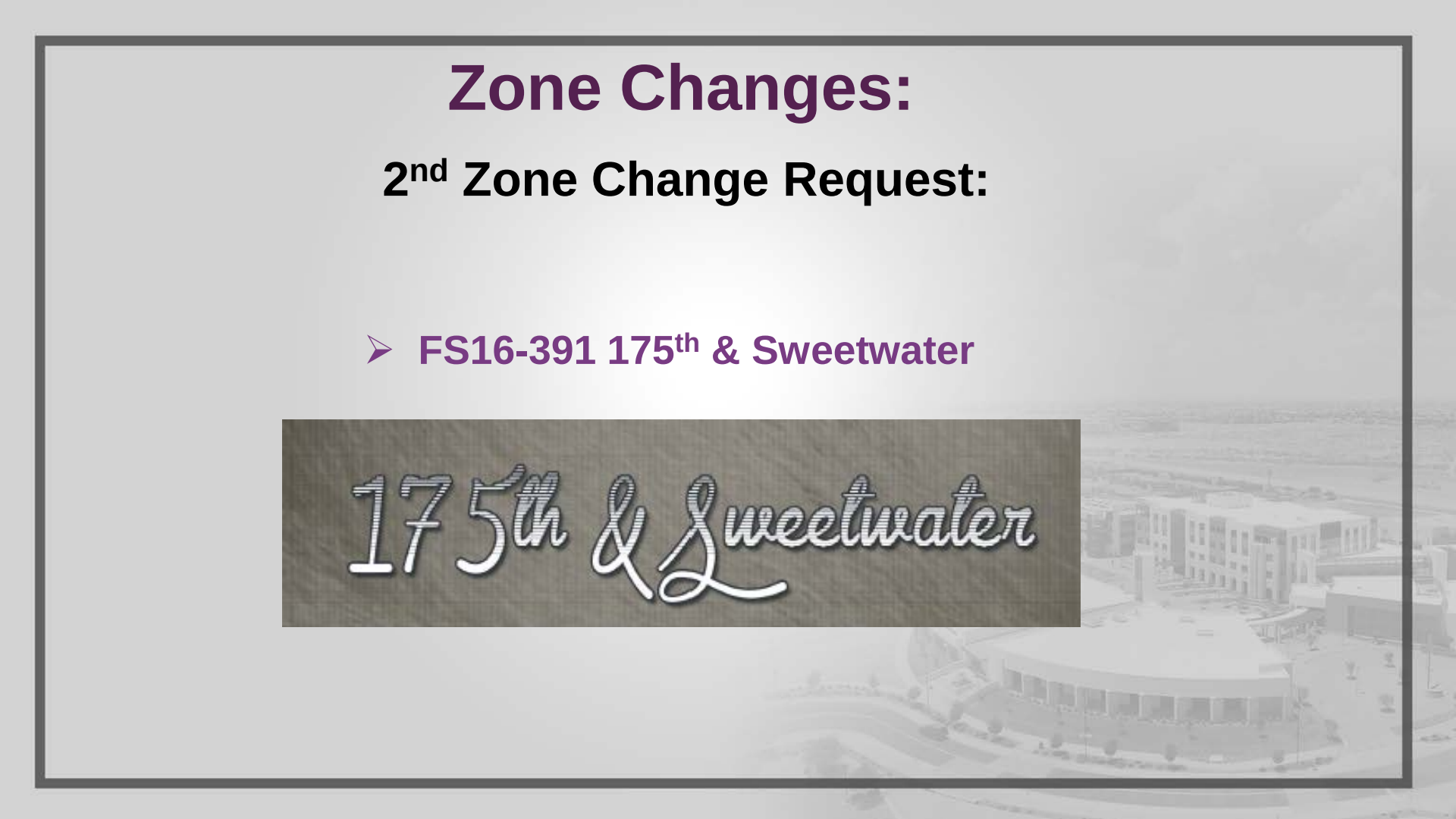


- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”

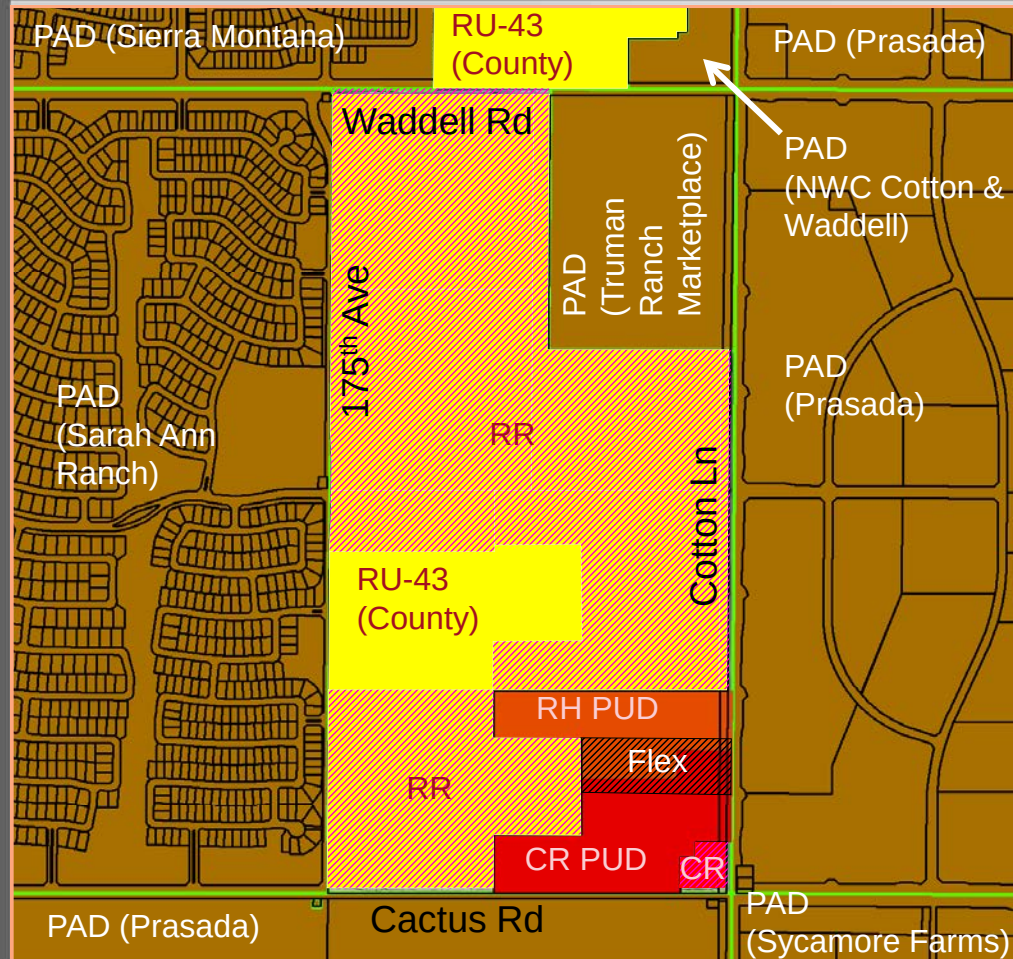
Zone Changes:

2nd Zone Change Request:

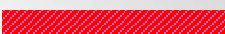
- **FS16-391 175th & Sweetwater**



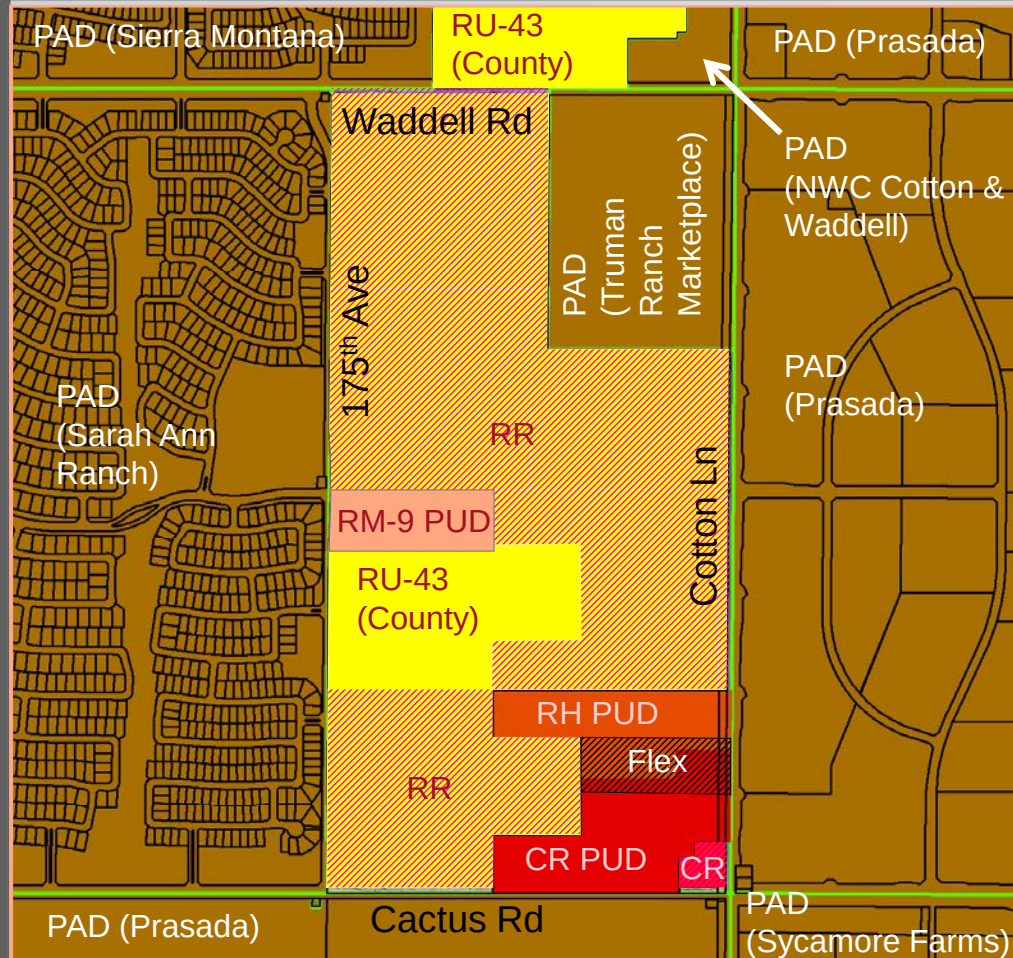
175th & Sweetwater



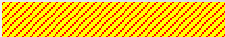
Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning*
-  Post-Annexation Surprise CR Zoning*
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

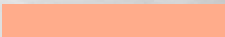
*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

175th & Sweetwater
FS16-391

-  Proposed RM-9 PUD Zoning

Zone Change

175th & Sweetwater
FS16-391



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175TH & SWEETWATER

FIGURE 3: DEVELOPMENT PLAN CONCEPT

APPROX. SCALE: 1/8" = 1' - 0"

1640 DRAIN BY: PK



11/2/14

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11/16/14 ANR0014/CAD/P/ANN0014-1405-FIGURE 3 DEVELOPMENT PLAN CONCEPT.dwg Rev. 2, 2014

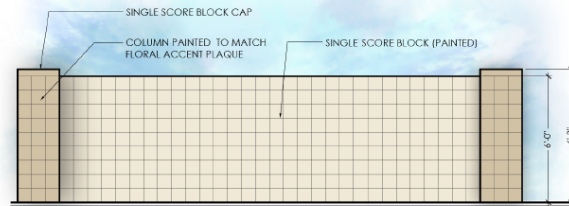
Table 1: RM-9 FUD Development Standards

Development Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35

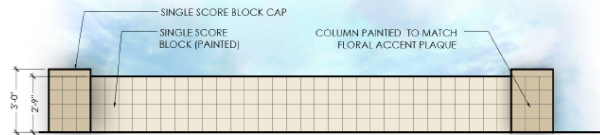
Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a FUE, in which case the minimum front setback shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.

Monuments and Walls



THEME WALL



PONY WALL

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”

Preliminary Plats:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia



Preliminary Plats:

1st Pre-Plat request:

➤ **FS16-392 Magnolia**



LEGAL DESCRIPTION

THAT PORTION OF THE NORTHEAST QUARTER AND THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2, WEST OF THE GILA AND SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA DESCRIBED AS FOLLOWS:

COMMENCING AT A BRASS CAP FOUND AT THE SOUTHWEST CORNER OF SAID SECTION 14, FROM WHICH A BRASS CAP FOUND AT THE SOUTH QUARTER CORNER OF SAID SECTION 14 BEARS SOUTH 89°48'58" WEST, 2,645.91 FEET.

THENCE ALONG THE SOUTH LINE OF SAID SOUTHWEST QUARTER, SOUTH 89°48'58" WEST, 1,566.22 FEET TO A POINT THAT LIES 1,566.24 FEET EASTERN OF THE SOUTH QUARTER CORNER OF SAID SECTION 14, THENCE NORTH 00°12'02" WEST, 33.00 FEET TO A POINT ON THE NORTH LINE OF THAT 33.00 FOOT WIDE SECTION 14, THENCE ALONG THE NORTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, MARICOPA COUNTY, ARIZONA, SAID POINT BEING THE POINT OF BEGINNING.

THENCE ALONG THE NORTH LINE OF SAID DEDICATED RIGHT OF WAY, SOUTH 89°48'58" WEST, 1,089.01 FEET TO A POINT ON THE WEST LINE OF SAID SOUTHWEST QUARTER.

THENCE ALONG THE WEST LINE OF SAID SOUTHWEST QUARTER, NORTH 00°12'48" EAST, 1,295.63 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE SOUTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 1,089.01 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA, NORTH 89°48'58" EAST, 1,077.57 FEET, TO THE MOST SOUTHWEST SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 316.90 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 89°48'58" EAST, 594.03 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 633.80 FEET TO THE NORTHEAST CORNER OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE WESTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 570.93 FEET TO A POINT ON THE WEST LINE OF THAT REAL PROPERTY DESCRIBED AS PARCEL NO. 2 IN DOCUMENT NO. 2009-1021524, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE WESTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2009-1021524, NORTH 00°12'02" WEST, 337.04 FEET TO A POINT ON THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14, SOUTH 89°48'58" WEST, 1,089.01 FEET TO AN ALUMINUM CAP, MARKED PLEN RLS 421377 FOUND AT THE CENTER OF SAID SECTION 14.

THENCE ALONG THE WEST LINE OF SAID NORTHEAST QUARTER, NORTH 00°12'48" EAST, 2,607.85 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 33.00 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 810.02 FEET TO A POINT ON THE EAST LINE OF THE WEST 810.02 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'48" WEST, 1,050.02 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1053.0 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 811.78 FEET TO A POINT ON THE EAST LINE OF THE WEST 1053.0 FEET OF THE EAST HALF OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'02" WEST, 633.80 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1715.99 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 1,188.86 FEET TO A POINT ON THE WEST LINE OF THE EAST 33.0 FEET OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 823.34 FEET.

THENCE CONTINUING ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 1,308.02 FEET TO A POINT ON THE NORTH LINE OF THE SOUTH 1,332.60 FEET OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 89°48'58" WEST, 958.17 FEET.

THENCE SOUTH 89°48'58" WEST, 287.98 FEET.

THENCE SOUTH 00°12'02" EAST, 633.80 FEET.

THENCE SOUTH 89°48'58" WEST, 285.94 FEET.

THENCE SOUTH 00°12'02" EAST, 348.90 FEET TO THE POINT OF BEGINNING.

SAD PARCEL CONTAINING 3,752,358 SQUARE FEET OR 173,838 ACRES, MORE OR LESS.

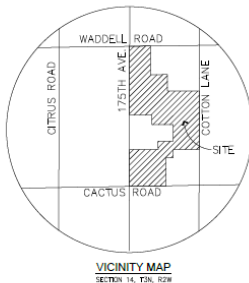
MAGNOLIA PRELIMINARY PLAT SURPRISE, ARIZONA

A PORTION OF THE EAST HALF OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA & SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA

SITE DATA

EXISTING ZONING: 110.0 A
GRID AREA: 101.4
LOT AREA: 101.4
GRID AREA: 101.4
GRID AREA: 101.4

89-48 PUD 6 89-48 PUD
110.0 A (89-48 74.5 A (89-48 105.2 A)
101.4 (89-48 74.5 A (89-48 105.2 A)
101.4
101.4
101.4



VICINITY MAP
SECTION 14, T3N, R2W
N10

FLOOD ZONE CERTIFICATION

THIS IS TO CERTIFY THAT A PORTION OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE FLOOD HAZARD AREA AS SHOWN ON THE PLAT OF SURVEY AND THAT THE REMAINDER OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE UNSHADDED ZONE. FLOOD HAZARD AREA IS SHOWN ON PARCEL NUMBER 000130048, DATED OCTOBER 16, 2013, AS PROVIDED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA). THE FLOOD ZONE BOUNDARY IS LOCATED BY SCALED MAP LOCATION AND GRAPHIC PLOTTING ONLY.

ZONE "A" AS DEFINED BY FEMA IS: SPECIAL FLOOD HAZARD AREAS INUNDATED BY THE 1% ANNUAL CHANCE FLOOD, NO LONGER FLOOD DEFORMATION (DEFORMATION).

SHADDED ZONE "X" AS DEFINED BY FEMA IS: AREAS OF 1% ANNUAL CHANCE FLOOD AREAS OF 1% ANNUAL CHANCE FLOOD WITH AVERAGE DEPTH OF LESS THAN 1 FOOT OR WHEN GRAVITATIONAL AREAS LESS THAN 1 SQUARE MILE, AND AREAS PROTECTED BY LEVEES FROM 1% ANNUAL CHANCE FLOOD.

DEVELOPER

SURPRISE ALLIANCE PARTNERS, LLC
11024 N. 28TH DRIVE, SUITE 170
PHOENIX, ARIZONA 85034

PHONE: (602) 499-0889
CONTACT: JOSEPH HADWIN

PLANNER

LUA URBAN DESIGN STUDIO
130 SOUTH 4TH AVENUE
TUCSON, ARIZONA 85709

PHONE: (520) 478-5151
CONTACT: MARK REID
PHONE: (480) 994-0984

ENGINEER

SANDY EVANS AND ASSOCIATES, INC.
4000 EAST WASHINGTON STREET, SUITE 250
PHOENIX, ARIZONA 85034

PHONE: (602) 478-5151
FAX: (602) 478-5151
EMAIL: ryd@evans-inc.com

SHEET INDEX

1 COVER SHEET
2 DETAIL AND CROSS SECTIONS
3-14 PRELIMINARY PLAT
15-17 BORING AND MARKING PLANS
18-20 SOLID WASTE COLLECTION ROUTE

BASIS OF BEARING

SOUTH 89°48'58" WEST, THE MEASURED BEARING BETWEEN A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND CITRUS LANE AND A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND 175TH AVENUE AS SHOWN HEREIN, UTILIZING THE LIDAR SMARTNET GPS NETWORK.

RELATIVE TO MARICOPA COUNTY, ARIZONA LOW DESCRIPTION PROJECTION.

LINEAR UNIT: INTERNATIONAL FEET
ANGULAR UNIT: DEGREES
PROJECTION TYPE: LAMBERT CONFORMAL CONIC (SINGLE PARALLEL)

LATITUDE OF ORIGIN: 33°15'00" N
CENTRAL MERIDIAN: 112°15'00" W
FALSE NORTHING: 1,500,000.000 IN
FALSE EASTING: 2,500,000.000 IN
STANDARD PARALLEL SCALE: 1.000000 (EXACT)

BENCHMARK

2 INCH CITY OF SURPRISE BRASS ORIGIN WITH RAISED DATUM POINT - MARKED CITY OF SURPRISE BENCHMARK 2017 1008.7 - LOCATED ON TOP OF GRANITE CURB APPROXIMATELY 700 FEET NORTH OF THE INTERSECTION OF CACTUS ROAD AND CITRUS LANE ON THE EAST SIDE OF CITRUS LANE.

ELEVATION 1246.65 NORTH AMERICAN VERTICAL DATUM 1988 (NAV88)

LEGEND

- CENTERLINE
- RIGHT OF WAY
- PROPERTY LINE
- EASEMENT
- ELECTRICAL
- GAS
- SANITARY SEWER
- TELEPHONE
- WATER
- OVERHEAD ELECTRICAL
- FLOW LINE
- IRRIGATION LINE
- PUD
- VALVE
- STORM DRAIN
- SEWER MANHOLE
- SEWER CLEANOUT
- EXISTING ELEVATION CONTOUR
- FLOW ARROW
- SIGN
- WATER VALVE
- FIRE HYDRANT
- GRADE BREAK
- MATCH LINE
- PARCEL LINE
- FLOODPLAIN UNITS



FS16-392

Preliminary Plat

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

ANNEAL CASE #
P16-427
DRAWING CASE #
P16-392

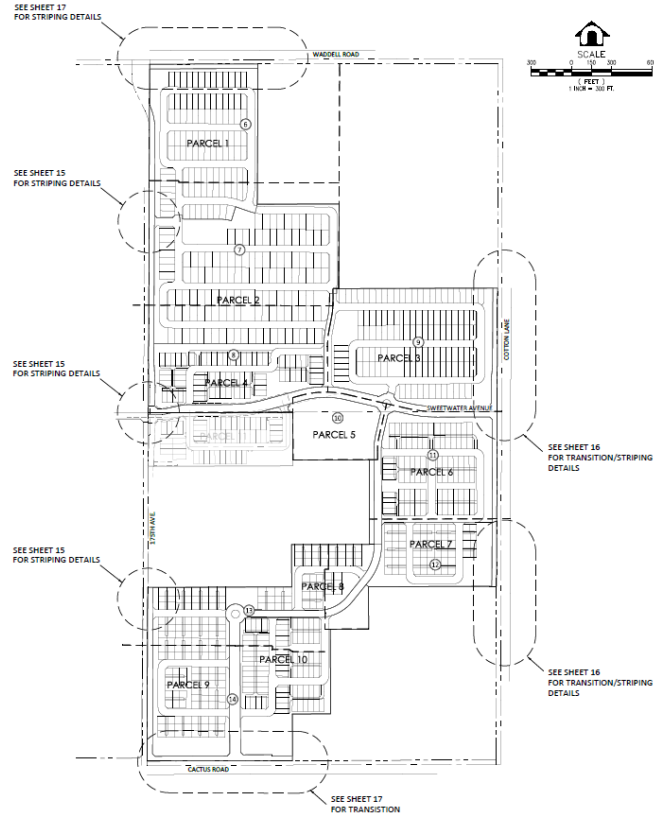
SECTION 14
TOWNSHIP 3N
RANGE 2W

JOB NO.
A00000002

1 SHEET
OF 20



Primary Plat

[illegible]

Preliminary Plat



FS16-392

- 812 Lots Total
 - 215, 45' x 110 Standard Lots in the RM-6 PUD Zoning District
 - 125, 55' x 115' Standard Lots in the RM-6 PUD Zoning District
 - 224, Alley Loaded Lots in the RM-9 PUD Zoning District
 - 248, Cluster Lots in the RM-9 PUD Zoning District

Preliminary Plat



FS16-392

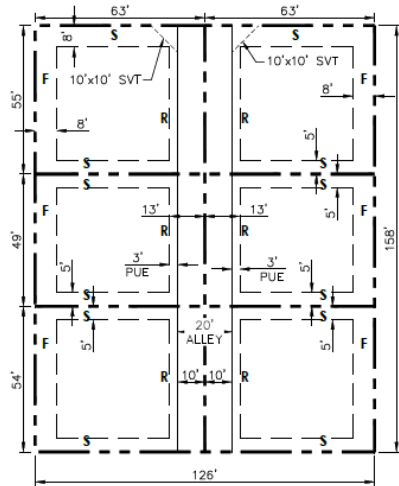
- Will integrate with 175th & Sweetwater Project
- Phase I must plat concurrently with 175th & Sweetwater Project or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities with the 175th & Sweetwater project and be part of a combined Magnolia HOA

Preliminary Plat

FS16-392



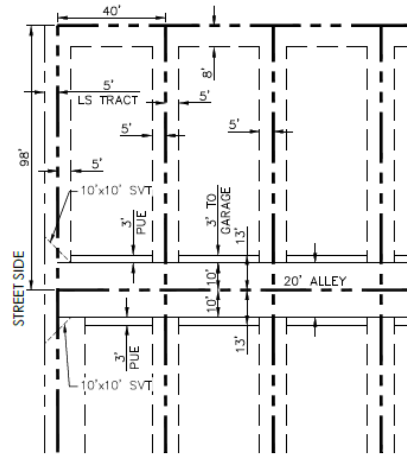
CLUSTER PRODUCT



F	= FRONT YARD
R	= REAR YARD
S	= SIDE YARD

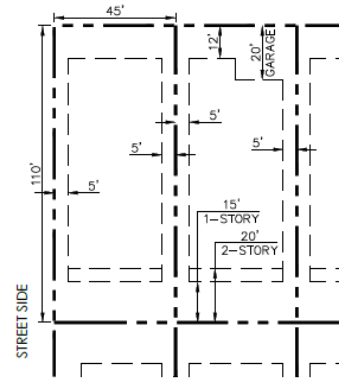
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
STREET SIDE:	8' (10' WHERE ADJACENT TO AN 8' PUE)
REAR: (ALLEY)	13'

ALLEY PRODUCT (3,920 S.F.)



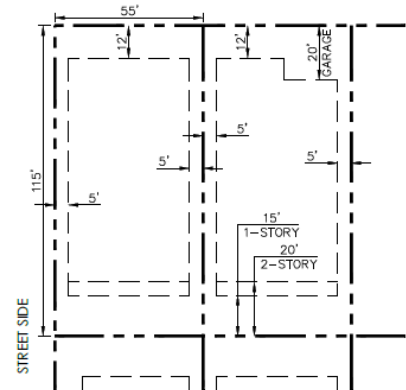
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
REAR: (ALLEY)	13'

45' X 110' LOT SIZE (4,950 S.F.)



FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

55' X 115' LOT SIZE (6,325 S.F.)

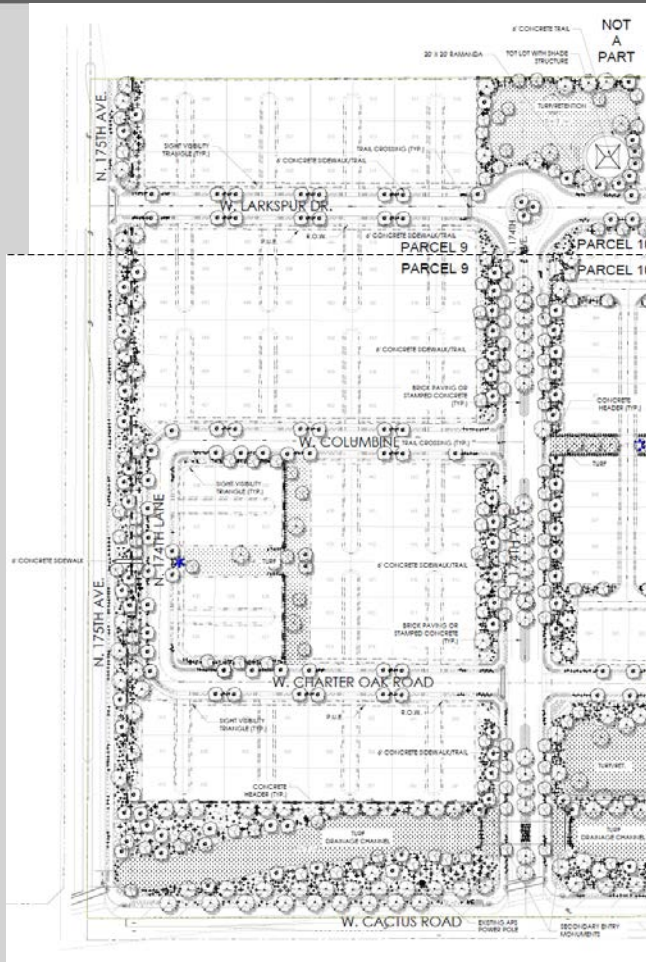


FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

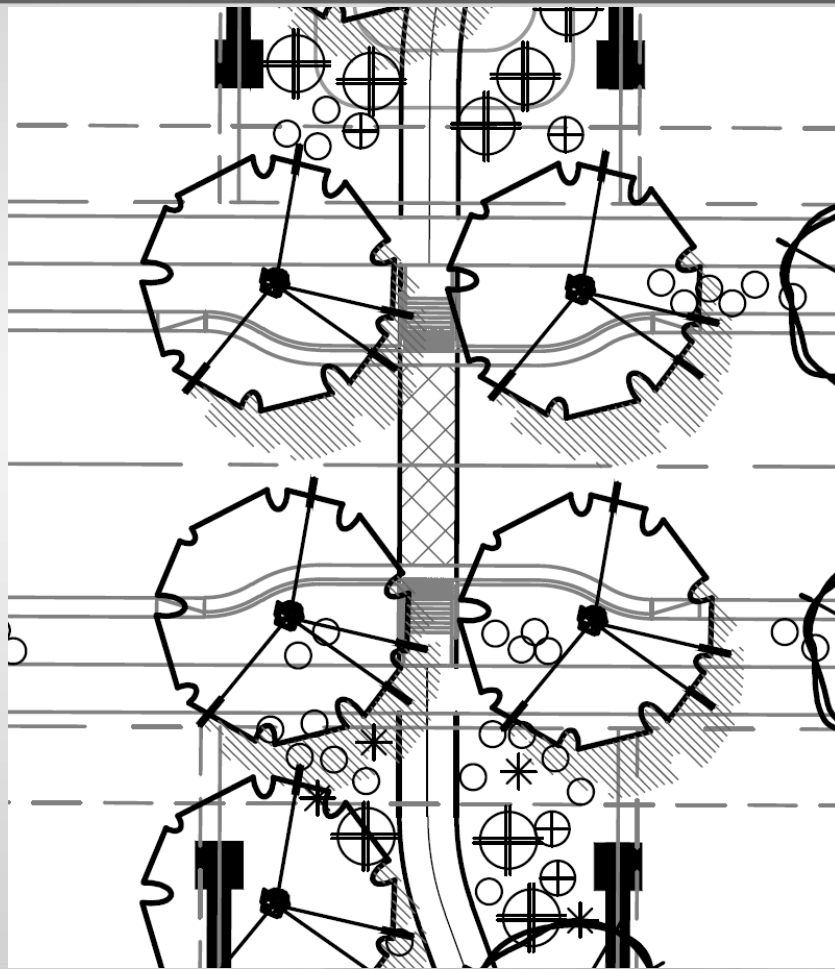
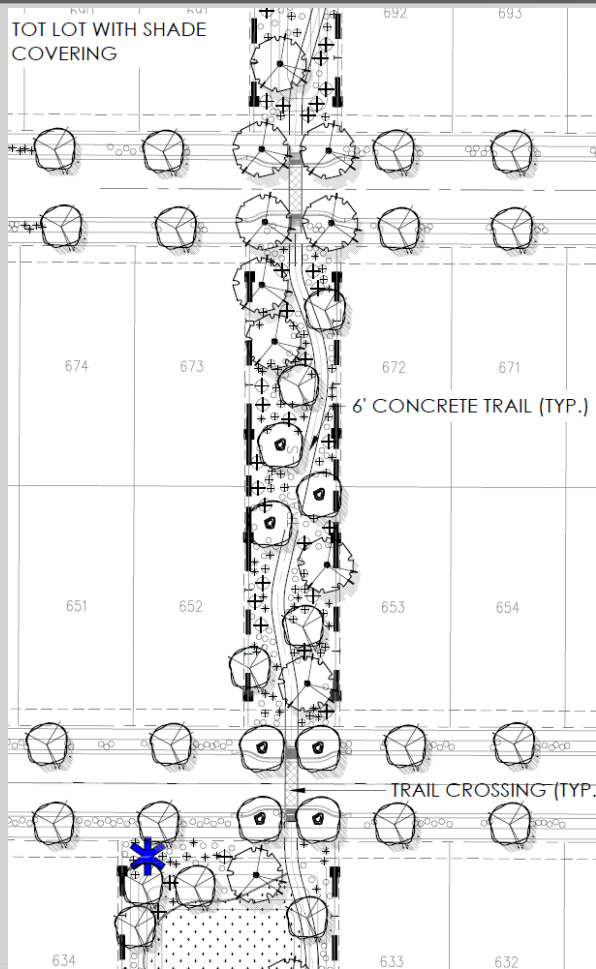


FS16-392

Preliminary Plat



TOT LOT WITH SHADE
COVERING



FS16-392

Preliminary Plat



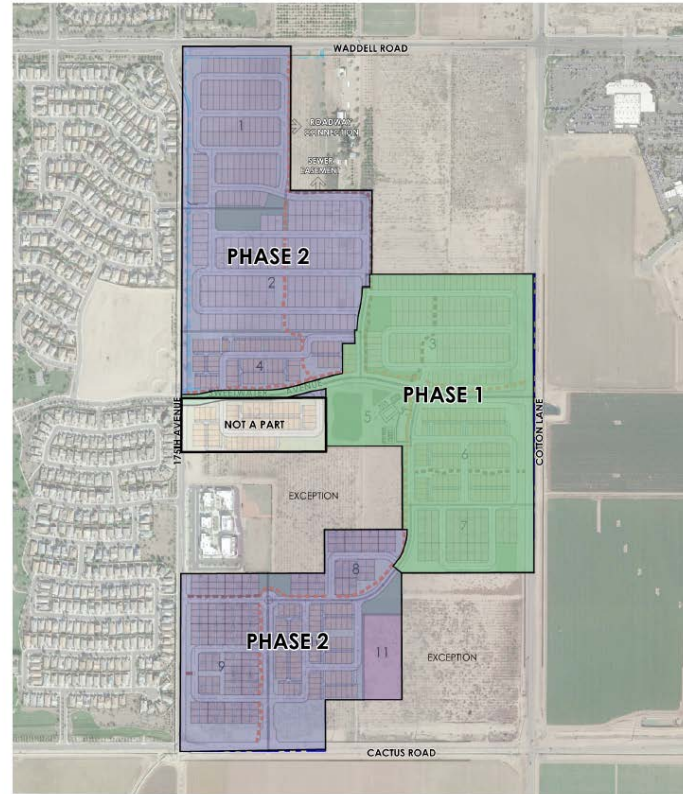
FS16-392

Preliminary Plat



FS16-392

Preliminary Plat



LVA urban design studio
 land planning • development entitlements • landscape architecture
 120 south oak avenue • tempe, arizona 85281 • 480.794.0994

MAGNOLIA

FIGURE 8: CONCEPTUAL PHASING PLAN

APPROX. SCALE: 1/8" = 1' 1/4"

1/8" = 1' 1/4" DRAWN BY: PR



9/8/16

PRELIMINARY - NOT FOR CONSTRUCTION - SUBJECT TO ENGINEERING AND CITY REVIEW AND APPROVAL - © COPYRIGHT LVA URBAN DESIGN STUDIO, L.L.C.
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 U:\1640-MAGNOLIA\CD\PLANNING\1640-FIGURE 8-CONCEPTUAL PHASING PLAN.dwg Sep 8, 2016

Commission Recommendation:



- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

Preliminary Plats:

2nd Pre-plat request:

- FS16-391 175th & Sweetwater



175th & Sweetwater

Preliminary Plat

175th & Sweetwater
FS16-391

- 49 Alley Loaded Lots in RM-9 PUD Zoning District
- Will integrate with Magnolia
- Must plat concurrently with Magnolia Phase I or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities and be part of the Magnolia HOA

175th & Weethaler
FS16-391

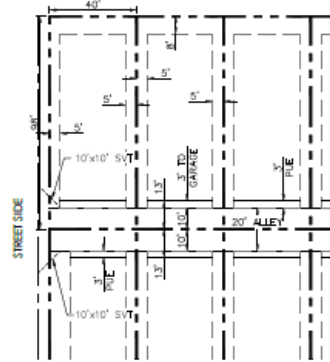


Preliminary Plat

175th & Sweetwater
FS16-391

ALLEY PRODUCT (3,920 S.F.)

FRONT STREET



FRONT:	8' 110' WHERE ADJACENT TO AN 8' PUBL
SIDE:	5'
REAR: (ALLEY)	13'

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



Commission Recommendations*:

*** Assumes prior City Council approval of related annexation)**



175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

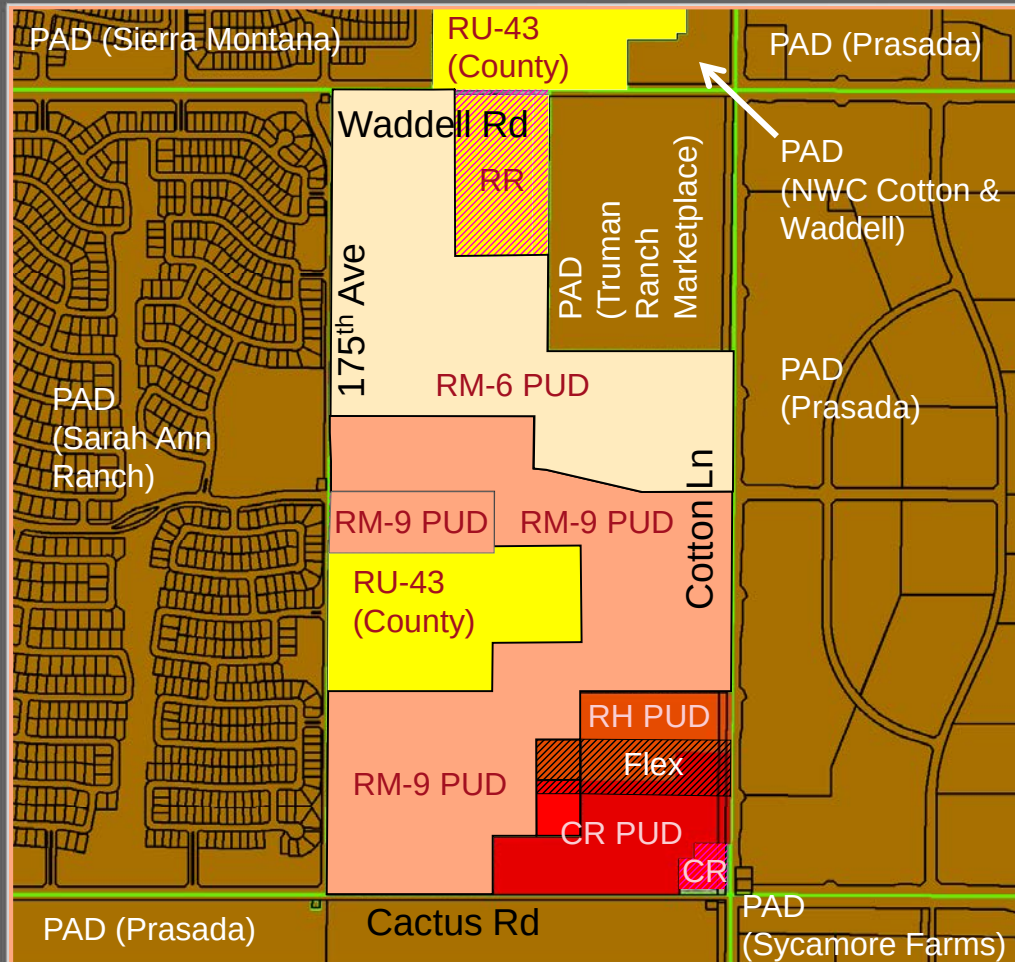


SURPRISE

ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning



175th & Sweetwater
FS16-391

- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning

ANNEXATION PETITION

TO THE HONORABLE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA:

We, the undersigned owners of one-half or more of the real and personal property that also represents one-half or more of the value of the real and personal property in the proposed annexation area that would be subject to taxation by the City of Surprise in the event of annexation, the below described territory being contiguous to the corporate limits of the City of Surprise, with the exterior boundaries of the territory proposed to be annexed shown on the map attached hereto, marked Exhibit "B" and made a part hereof, request the City of Surprise to annex the following described territory, provided that the requirements of A.R.S §9-471, and amendments thereto are fully observed.

The description of the territory proposed to be annexed, not already within the present limits of the City of Surprise and located in Maricopa County, Arizona, is as described and attached hereto, marked Exhibit "A" and made a part hereof:

Name of Property Owner	Mailing Address of Property Owner	Parcel Number or Legal Description
John C. & Helen G. Truman Trust, UAD 11/3/1978	P.O. Box 145 Waddell, AZ 85355	APN# 502-04-004 APN# 502-04-006B APN# 502-04-006A APN# 502-04-005D
Signatures of Property Owner	Phone Number of Property Owner	Date Signed
<i>Michael A. Truman</i> <i>Loren T. Emshoff</i>	623-975-2182 602-885-3329 602-885-0995	Jan 5, 2017 Jan 5, 2017 January 5, 2017

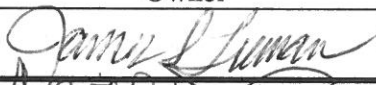
* This petition revised from the original with respect to the signature block only.

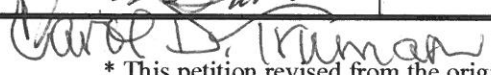
ANNEXATION PETITION

TO THE HONORABLE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA:

We, the undersigned owners of one-half or more of the real and personal property that also represents one-half or more of the value of the real and personal property in the proposed annexation area that would be subject to taxation by the City of Surprise in the event of annexation, the below described territory being contiguous to the corporate limits of the City of Surprise, with the exterior boundaries of the territory proposed to be annexed shown on the map attached hereto, marked Exhibit "B" and made a part hereof, request the City of Surprise to annex the following described territory, provided that the requirements of A.R.S §9-471, and amendments thereto are fully observed.

The description of the territory proposed to be annexed, not already within the present limits of the City of Surprise and located in Maricopa County, Arizona, is as described and attached hereto, marked Exhibit "A" and made a part hereof:

Name of Property Owner	Mailing Address of Property Owner	Parcel Number or Legal Description
James S. & Carol D. Truman	P.O. Box 145 Waddell, AZ 85355	APN# 502-04-022D
Signature of Property Owner	Phone Number of Property Owner	Date Signed
	602-320-3355	1-5-2017

 623-688-1496 1-5-2017

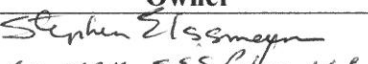
* This petition revised from the original with respect to the signature block only.

ANNEXATION PETITION

TO THE HONORABLE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA:

We, the undersigned owners of one-half or more of the real and personal property that also represents one-half or more of the value of the real and personal property in the proposed annexation area that would be subject to taxation by the City of Surprise in the event of annexation, the below described territory being contiguous to the corporate limits of the City of Surprise, with the exterior boundaries of the territory proposed to be annexed shown on the map attached hereto, marked Exhibit "B" and made a part hereof, request the City of Surprise to annex the following described territory, provided that the requirements of A.R.S §9-471, and amendments thereto are fully observed.

The description of the territory proposed to be annexed, not already within the present limits of the City of Surprise and located in Maricopa County, Arizona, is as described and attached hereto, marked Exhibit "A" and made a part hereof:

Name of Property Owner	Mailing Address of Property Owner	Parcel Number or Legal Description
S & S Cotton LLC	9528 Midlothian Drive Brentwood TN 37027	APN# 502-04-022A APN# 502-04-023C APN# 502-04-002E APN# 502-04-002Q
Signature of Property Owner	Phone Number of Property Owner	Date Signed
 CO MAN S & S Cotton, LLC	480-294-0928	1.5.17

* This petition revised from the original with respect to the signature block only.

ANNEXATION PETITION

TO THE HONORABLE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA:

We, the undersigned owners of one-half or more of the real and personal property that also represents one-half or more of the value of the real and personal property in the proposed annexation area that would be subject to taxation by the City of Surprise in the event of annexation, the below described territory being contiguous to the corporate limits of the City of Surprise, with the exterior boundaries of the territory proposed to be annexed shown on the map attached hereto, marked Exhibit "B" and made a part hereof, request the City of Surprise to annex the following described territory, provided that the requirements of A.R.S §9-471, and amendments thereto are fully observed.

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S & S Cotton LLC	9528 Midlothian Drive Brentwood TN 37027	APN# 502-04-022A APN# 502-04-023C APN# 502-04-002E APN# 502-04-002Q
Signature of Property Owner	Phone Number of Property Owner	Date Signed
	480-294-0928	1-4-17

CO-MANAGER

* This petition revised from the original with respect to the signature block only.

ANNEXATION PETITION

TO THE HONORABLE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA:

We, the undersigned owners of one-half or more of the real and personal property that also represents one-half or more of the value of the real and personal property in the proposed annexation area that would be subject to taxation by the City of Surprise in the event of annexation, the below described territory being contiguous to the corporate limits of the City of Surprise, with the exterior boundaries of the territory proposed to be annexed shown on the map attached hereto, marked Exhibit "B" and made a part hereof, request the City of Surprise to annex the following described territory, provided that the requirements of A.R.S §9-471, and amendments thereto are fully observed.

The description of the territory proposed to be annexed, not already within the present limits of the City of Surprise and located in Maricopa County, Arizona, is as described and attached hereto, marked Exhibit "A" and made a part hereof:

Name of Property Owner	Mailing Address of Property Owner	Parcel Number or Legal Description
Truman MC, L.L.C.	560 S. Villa Nueva Drive Litchfield Park, Arizona 85430	Part of APN# 502-04-004 and 006B. (See Attached Legal Description)
Signature of Property Owner	Phone Number of Property Owner	Date Signed
<i>Margaret Truman Dehr</i> <i>Manager</i>	<i>(623) 935-3373</i>	<i>January 4, 2017</i>

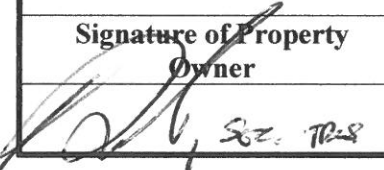
* This petition revised from the original with respect to the signature block only.

ANNEXATION PETITION

TO THE HONORABLE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA:

We, the undersigned owners of one-half or more of the real and personal property that also represents one-half or more of the value of the real and personal property in the proposed annexation area that would be subject to taxation by the City of Surprise in the event of annexation, the below described territory being contiguous to the corporate limits of the City of Surprise, with the exterior boundaries of the territory proposed to be annexed shown on the map attached hereto, marked Exhibit "B" and made a part hereof, request the City of Surprise to annex the following described territory, provided that the requirements of A.R.S §9-471, and amendments thereto are fully observed.

The description of the territory proposed to be annexed, not already within the present limits of the City of Surprise and located in Maricopa County, Arizona, is as described and attached hereto, marked Exhibit "A" and made a part hereof:

Name of Property Owner	Mailing Address of Property Owner	Parcel Number or Legal Description
A & B Investments, Inc.	P.O. Box 6410 Scottsdale, AZ 85261	APN# 502-04-002J APN# 502-04-002P
Signature of Property Owner	Phone Number of Property Owner	Date Signed
	602-300-3333	1-4-2017

* This petition revised from the original with respect to the signature block only.



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date:	January 17, 2017	Contact Person:	ROBERT KUHFUSS - COMMUNITY DEVELOPMENT
Submitting Department:	CD	District:	3
Staff Recommendations:	Approve		

Consent	Regular	Public Hearing	x	Report/Discussion
---------	---------	----------------	---	-------------------

Agenda Wording:

Consideration and action pertaining to rezoning approximately 181 acres of property generally located between Cotton Lane, 175th Avenue, Waddell Road and Cactus Road from Residential Ranch (RR) to Residential Medium Density 6 DU/Acre Planned Unit Development (RM-6 PUD), Residential Medium Density 9 DU/Acre Planned Unit Development (RM-9 PUD), Residential High Density Planned Unit Development (RH PUD) with Flex Zone, Regional Commercial Planned Unit Development (CR PUD) with and without Flex Zone; and from Residential High Density Planned Unit Development (RH PUD) to Residential Medium Density 9 DU/Acre Planned Unit Development: Ordinance # 2017-03.

Motion:

I move to approve Ordinance # 2017-03.

Background:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of a rezone to various zoning districts, each with a PUD Overlay to allow deviations from the base development standards. The subject request involves approximately 181 acres of raw land that is currently located within a County island roughly bounded by Cotton Lane, 175th Avenue, Waddell Road and Cactus Road. This request follows a related annexation case being processed under case FS16-427 and is associated with a Preliminary Plat (FS16-392) along with a companion Zone Change and Preliminary Plat being processed under FS16-391. Note: the subject request was continued at the December 15, 2016 Planning and Zoning Commission hearing to a date-certain of January 5, 2017. The results of that hearing are not known as of the writing of this report.

Objective Analysis:

The subject zone change request contemplates a change to four separate zoning districts: RM-6, RM-9, RH and CR (each with a PUD Overlay). Unlike typical "PAD" zoning, the subject request falls under the current SUDC. As such, the uses associated with each of the proposed zoning districts are per Section 122-43 of the SUDC. The proposed PUD Overlay, however, will allow certain deviations from the development standards as specified in the SUDC. The Magnolia project is very well designed and is consistent with the General Plan and SUDC. The proposed development standards requested under the

PUD Overlay will allow the applicant to develop the site in a creative manner in keeping with the intent of the SUDC. Amenities included will provide recreational opportunities for the neighborhood. The proposed zone change is consistent with the Surprise General Plan 2035 and the proposed development standards will allow the property to be reasonably developed in a manner consistent with the listed companion cases.

Policy Compliant:

The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various Neighborhood types included within the character area. The subject proposal contemplates up to 900 dwelling units, which equates to approximately 5 DU/Ac. As such the proposed zoning most closely aligns with the Suburban Neighborhood type and is consistent with the General Plan.

Financial Impact:

All activity related to ongoing development of the City of Surprise has an economic and fiscal impact on the city and the region.

Budget Impact:

There is no anticipated budget impact related to this item.

FTE Impact:

This item does not have an impact on current staff levels.

ATTACHMENTS:

Click to download

- ☐ [00 - FS16-392 Magnolia Zone Change - RFLS #5460 - Staff Report](#)
 - ☐ [01 - FS16-392 Magnolia Zone Change - RFLS #5460 - Vicinity Map](#)
 - ☐ [02 - FS16-392 Magnolia Zone Change - RFLS #5460 - Case Map](#)
 - ☐ [03 - FS16-392 Magnolia Zone Change - RFLS #5460 - Zoning Narrative - December 2016 Version](#)
 - ☐ [04 - FS16-392 Magnolia Zone Change - RFLS #5460 - Public Participation Report Excerpt](#)
 - ☐ [05 - FS16-392 Magnolia Zone Change - RFLS #5460 - Luke AFB Comments](#)
 - ☐ [06 - FS16-392 Magnolia Zone Change - RFLS #5460 - ADOT Comments](#)
 - ☐ [07 - FS16-392 Magnolia Zone Change - RFLS #5460 - MWD Comments](#)
 - ☐ [08 - Ordinance 2017-03](#)
 - ☐ [09 - FS16-392 Magnolia Zone Change - RFLS #5460 - Public Engagement Form for Magnolia](#)
 - ☐ [10 - FS16-392 Magnolia Zone Change - RFLS #5460 - Presentation](#)
-

ZONE CHANGE

REPORT TO THE CITY COUNCIL

Case: **FS16-392**

Project Name: Magnolia Rezone

Council District: 3

Meeting Date: **January 17, 2017**

Planner: Robert H. Kuhfuss, AICP

Owner: S & S Cotton, LLC et. al.

Applicant: Mark Reddie of LVA Urban Design Studio on behalf of AZ Community Development, LLC

Request: Rezone from RR to RM-6 PUD; from RR to RM-9 PUD; from RH PUD to RM-9 PUD; from RR to RH PUD with Flex Zone; from RR to CR PUD with Flex Zone and from RR to CR PUD.

Site Location: Generally between Cotton Lane and 175th Avenue, Waddell Road to Cactus Road

Site Size: 181 acres (approx.)

Density: 5.0 DU/Ac

General Plan Conformance: The proposal is consistent with the Surprise General Plan 2035

Support/Opposition: None known

Staff Recommendation: **Approve**, subject to stipulations 'a' through 'c'

Commission Recommendation: Unknown as of the writing of this report

Introduction:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of five (5) separate requests relating to the proposed development in what is currently a county island located in the western portion of Surprise, near Sarah Ann Ranch. These five requests are listed below, with the subject request highlighted in **bold font**; however, this report should be read in the context of the other four requests.

Case FS16-391 – 175th & Sweetwater

- Zone Change from RR to RM-9 PUD
- Preliminary Plat

Case FS16-392 – Magnolia

- **Rezone from RR to RM-6 PUD; from RR to RM-9 PUD; from RH PUD to RM-9 PUD; from RR to RH PUD with Flex Zone; from RR to CR PUD with Flex Zone and from RR to CR PUD.**
- Preliminary Plat

Case FS16-427 – Annexation*, **

Four of the five aforementioned requests will first be presented to the Planning and Zoning Commission, who will make a recommendation to the City Council. The first of the five requests involves the actual annexation of the property and will only be heard by the City Council. It is envisioned that all five requests will be presented to the City Council on January 17, 2017.

The following map depicts the county island status as currently existing and post-annexation.



* The annexation request was initially tied to FS16-391 and FS16-392; however, due to the differing land masses involved, the annexation was broken out from the other two cases and assigned its own case number.

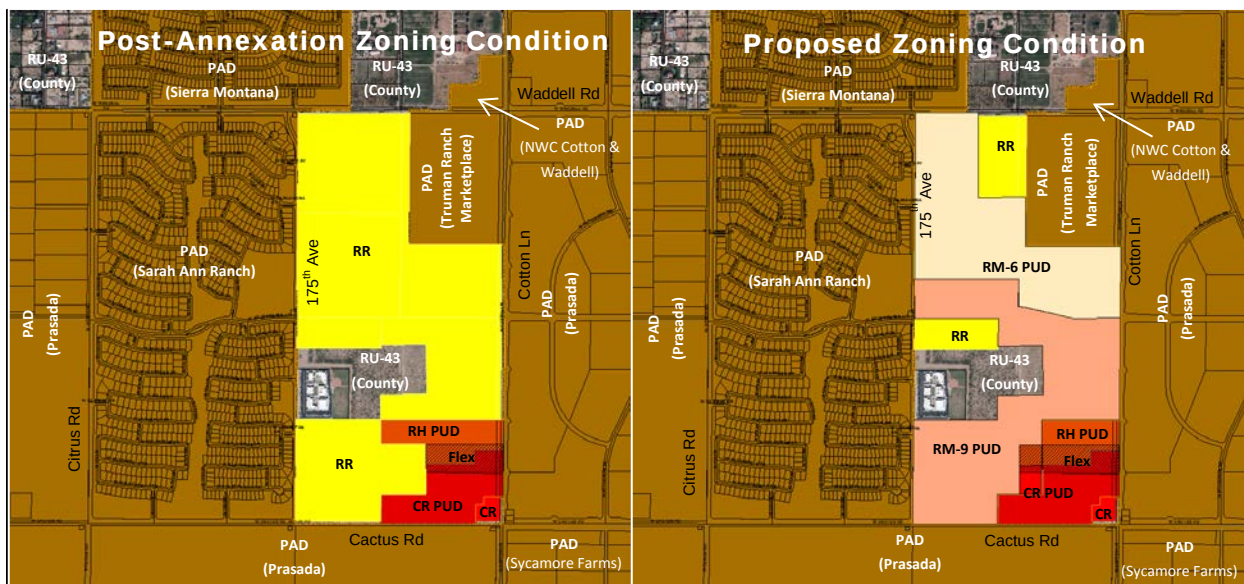
** The blank petition relating to the proposed annexation was reviewed and heard by the City Council during a public hearing conducted on November 15, 2016 and is tentatively scheduled for final action by the City Council on January 17, 2017 together with the other related requests. Information regarding the proposed annexation may be found on-line at <https://agenda.surpriseaz.gov>.

Project Description:

The subject request involves the rezoning of approximately 181 acres of currently unincorporated land to various zoning districts, each with a PUD Overlay to allow deviations from the base development standards. The rezone follows a related annexation case and precedes a related Preliminary Plat.

Surrounding Land Zoning:

The aforementioned annexation covers essentially all of the unincorporated land located within the affected county island with the exception of any land located north of Waddell Road as well as the Paradise Honors school campus; however, the subject zone change request only covers a portion of the annexation area. The following two (2) maps depict the post-annexation zoning condition and the proposed zoning included in the subject request.



Background:

July 28, 2016: Staff met with the applicant to discuss the project during a regularly scheduled Concept Review meeting under CR16-305.

August 8, 2016: Staff met with the applicant to discuss annexation logistics.

August 23, 2016: Staff met with the applicant to discuss product design.

September 12, 2016: The applicant filed a request for a Zone Change and Preliminary Plat under case FS16-391. The applicant filed a second request for a companion Zone Change and Preliminary Plat under case FS16-392. The latter also included an annexation request.

September 28, 2016: On behalf of the applicant, staff opened case FS16-427 relating to the annexation of the subject property.

October 19, 2015: The applicant held a neighborhood outreach meeting to discuss the project.

October 31, 2016: Staff met with the applicant to discuss review comments.

November 8, 2016: The applicant filed their second submittal for the subject case.

November 15, 2016: The City Council approved the blank annexation petition relating to the annexation of the subject property as well as other proximal properties under case FS16-427.

December 1, 2016: Staff met with the applicant to discuss the Final Plat relating to the project during a regularly scheduled Concept Review meeting under CR16-511.

December 15, 2016: The Commission continued the case to a date-certain of January 5, 2017 due to an advertising error.

January 5, 2017: The Zone Change and Preliminary Plat requests being processed under FS16-391 and FS16-392 are scheduled for review by the Planning and Zoning Commission; however, the Commission's recommendation is unknown as of the writing of this report.

Citizen Outreach:

The site was posted in accordance with the SUDC and state statute. The City of Surprise also sent notices via First Class mail in accordance with the SUDC and state statute. The applicant held a citizen outreach meeting on October 19, 2016, which was well attended. While staff has received no items of opposition or support for the project, the applicant's Citizen Participation Final Report indicates one (1) member of the public offered positive feedback and two (2) members of the public offered negative feedback. The summary report also indicated that seven (7) people offered neutral comments and suggestions. The body of the summary report is included as an attachment to this report.

Analysis and Discussion:

The subject zone change request contemplates a change to four separate zoning districts: RM-6, RM-9, RH and CR (each with a PUD Overlay). As shown on Figure 2 of the zoning narrative, the RM-6 PUD portion will occupy the northern portion of the site. RM-9 PUD will occupy the majority of the balance of the site, with the exception of a small area located near the southeast, which will become RH PUD and CR PUD with a "Flex Zone" covering most of that area.

Unlike typical “PAD” zoning, the subject request falls under the current SUDC. As such, the uses associated with each of the proposed zoning districts are per Section 122-43 of the SUDC. The proposed PUD Overlay, however, will allow certain deviations from the development standards as specified in the SUDC. The following table as taken from the zoning narrative expresses the proposed residential development standards applicable to the site. Those items expressed in red font deviate from the base standard. Also of note are several footnotes which serve to clarify how certain development standards are to be applied.

Table 1: RM-6 PUD and RM-9 PUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1) (2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a PUE, in which case the minimum front setback for RM-9 shall be 10').
- (2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.
- (4) For RM-6 PUD, single-story minimum setback is 15', and two-story minimum setback is 20'.
- (5) For cluster product in the RM-9 PUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.

The aforementioned RH PUD / CR PUD / Flex Zone portion is discussed in Section 1.10 of the zoning narrative and is intended to mimic the existing zoning of the adjacent property located to the east and south. The rationale for this component of the zone change is to allow for the “swapping” of land in order to better integrate the otherwise discontinuous parcels, while keeping both parties whole with respect to development rights.

Another feature of the zoning and tied to the PUD Overlay is the entry monument and wall configuration. Figures 6 through 7A of the zoning narrative depict walls and monuments that exceed the height limitations as specified in the SUDC and/or set a particular tone for the project through the use of decorative wrought iron, medallions, faux stone and concrete caps. Staff believes these features add to the amenity value of the community and exceed the requirements of the SUDC.

Figure 3 of the narrative depicts the anticipated lotting for the project. This lotting configuration is expressed in the related Preliminary Plat which is discussed under separate cover; however, staff notes that Figure 3 is intended to be a conceptual design and could change as long as such changes are implemented through the platting process.

Utility and Services Table:

Electric:	Arizona Public Service
Water:	EPCOR
Wastewater:	City of Surprise
Refuse:	City of Surprise
Natural Gas:	Southwest Gas
Irrigation:	Maricopa Water District
Schools:	Dysart USD

Conformance with Adopted Plans:

Surprise General Plan 2035: The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various Neighborhood types included within the character area. The subject proposal contemplates up to 900 dwelling units, which equates to approximately 5 DU/Ac. As such the proposed zoning most closely aligns with the Suburban Neighborhood type and is consistent with the General Plan.

Reviewing Agencies:

Luke Air Force Base (LAFB): In a letter dated October 3, 2015 (attached), LAFB indicated that the subject development met the Graduated Density Concept and would not interfere with flight operations. LAFB also requested a robust notification program.

Arizona Department of Transportation (ADOT): In an email dated September 20, 2016 (attached), ADOT indicated the proposed development would not affect any ADOT highway facilities.

Maricopa Water District (MWD): In a memo dated October 19, 2016 (attached), MWD indicated the property covered by this application is subject to certain MWD interests including existing facilities and other property interests. MWD requires that prior to Final Plat approval, certain comments must be addressed.

202 **Summary:**

203
204 The Magnolia project is very well designed and is consistent with the General Plan and SUDC. The
205 proposed development standards requested under the PUD Overlay will allow the applicant to
206 develop the site in a creative manner in keeping with the intent of the SUDC. Amenities included
207 will provide recreational opportunities for the neighborhood residents.
208

209 **Findings:**

- 210
211
 - The proposed zone change is consistent with the Surprise General Plan 2035.
 - The proposed development standards will allow the property to be reasonably developed.

212
213

214 **Recommendation:**

215
216 Based on the findings noted above, staff recommends the Commission move to recommend
217 **approval** of the subject rezone request to the City Council, subject to stipulations 'a' through 'c' as
218 outlined below:
219

- 220
 - a. Development and use of the site shall be in substantial conformance with the project
221 narrative entitled "Magnolia", prepared by LVA Urban Design Studio, dated revised
222 December 2016 and stamped received December 6, 2016, except as modified by the
223 following stipulations.
224
 - b. Approval of this zone change request presumes the successful annexation of the subject
225 property as being processed under FS16-427. Should said annexation request fail, the
226 zoning of the property granted under the subject approval is null and void.
227
228
 - c. Non-compliance with the stipulations of approval of this case will be treated as a violation in
229 accordance with the provisions of Article XIV of the Surprise Unified Development Code.
230
231

232 However, should the Commission wish to recommend denial of the request, the Commission
233 should make its own findings and base its decision on those alternative findings.
234

235 **Attachments:**

- 236
237 01 Vicinity Map (1 page)
238 02 Case Map (1 page)
239 03 Project Narrative (27 pages)
240 04 Citizen Participation Final Report (excerpt, 6 pages)
241 05 Luke AFB comments (2 pages)
242 06 ADOT comments (1 page)
243 07 MWD comments (1 page)
244 08 Draft Adopting Ordinance w/ Exhibits (12 pages)

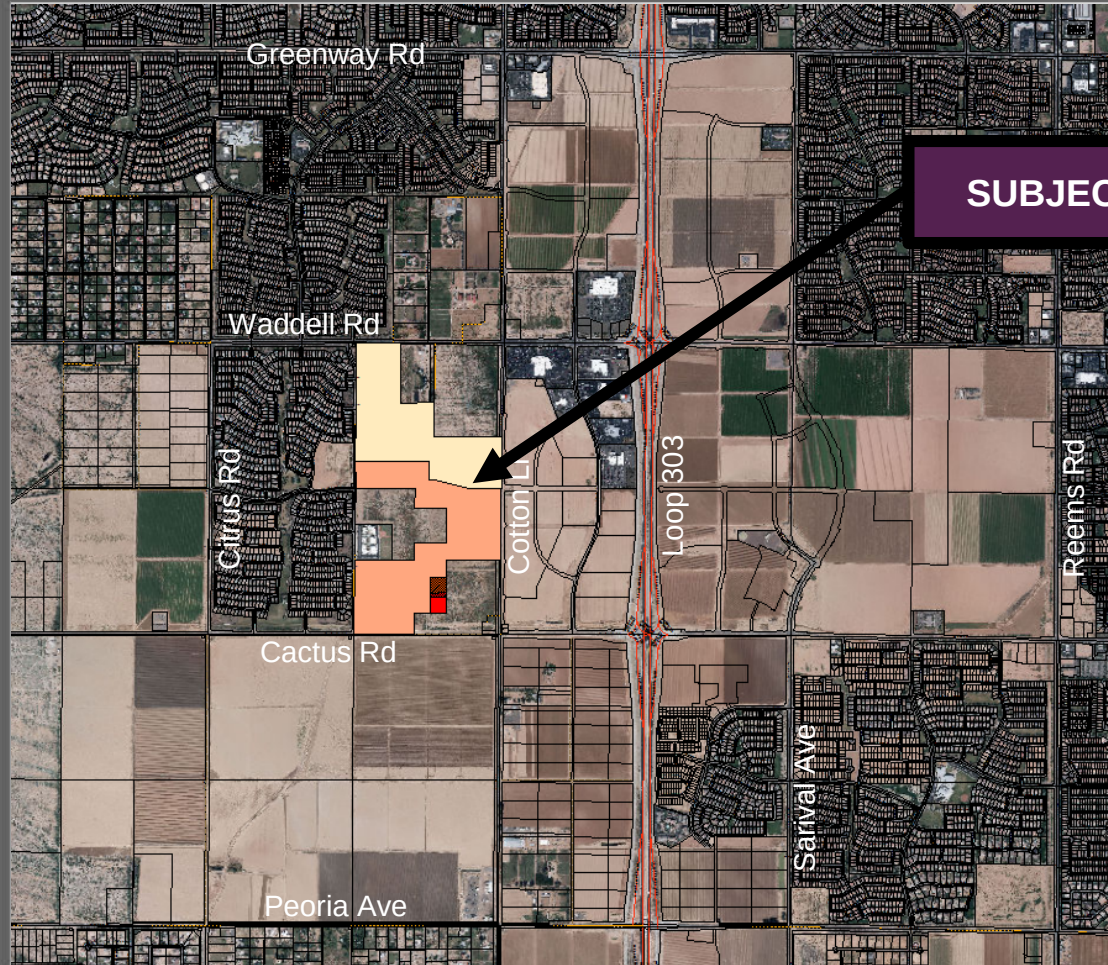
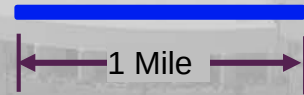
**FS16-392
Magnolia Rezone**

SUBJECT SITE

Vicinity Map



North





SURPRISE

ARIZONA

City Council

January 17, 2017



175th & Sweetwater



FS16-427

- ✓ Annexation

FS16-391 175th & Sweetwater

- ✓ Zone Change
- ✓ Preliminary Plat

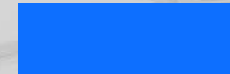
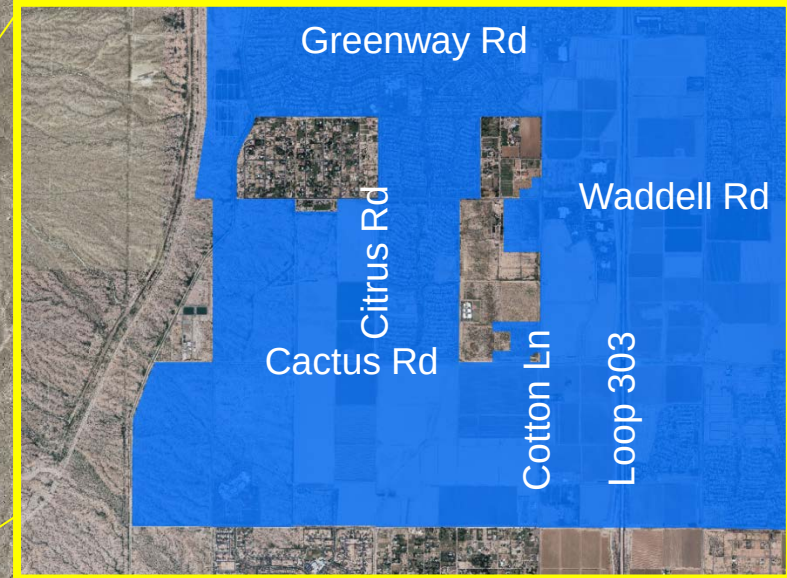
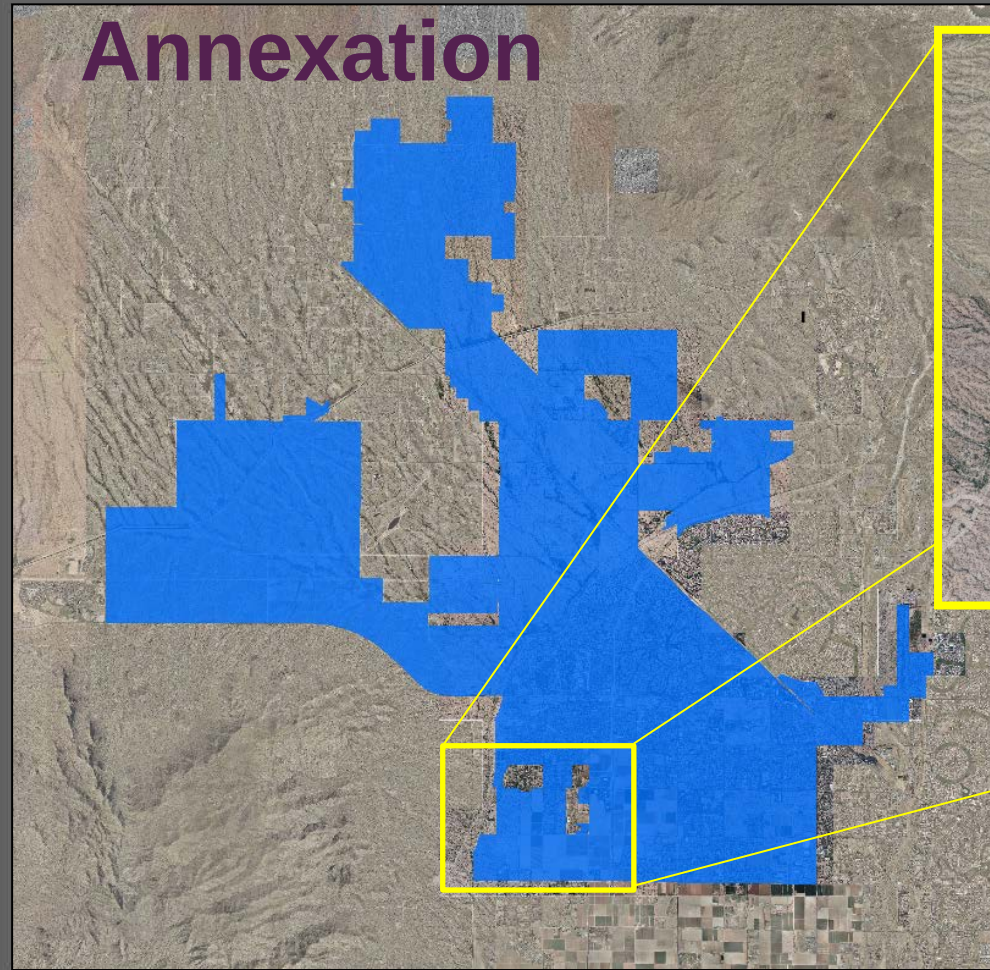
FS16-392 Magnolia

- ✓ Zone Change
- ✓ Preliminary Plat



175th & Sweetwater

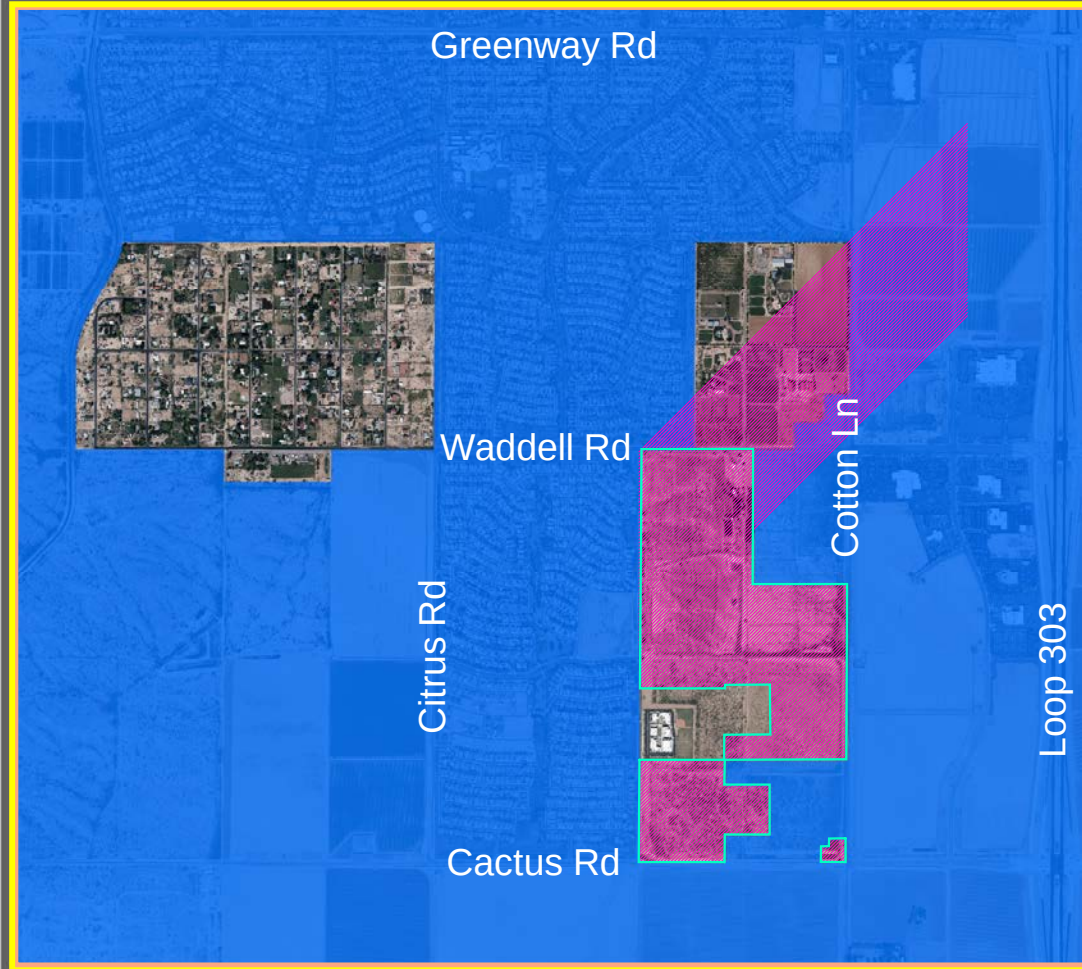
Annexation



Existing Surprise
Annexation

FS16-427

Annexation



FS16-427

Greenway Rd

Waddell Rd

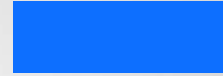
Citrus Rd

Cactus Rd

Cotton Ln

Loop 303

Annexation



Existing Surprise
Annexation

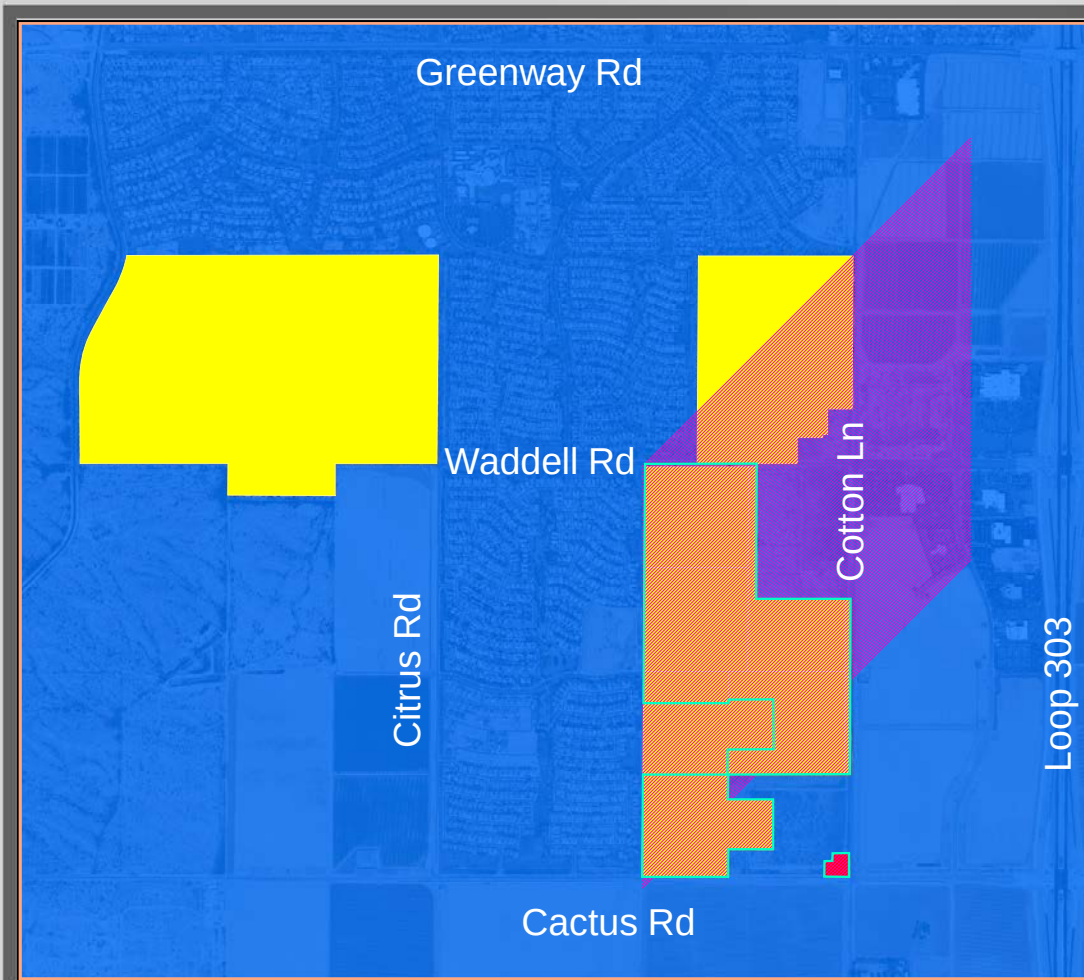


Existing County
RU-43 Zoning

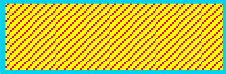
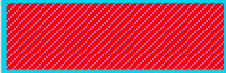


Existing County
C3 Zoning

FS16-427



Annexation

-  Existing Surprise Annexation
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning

FS16-427

Financial Impact Analysis

➤ Operating Funds

- Negative impact
- Expenses greater than revenue by \$8,851,300 over 20 years
- \$442,600 annually

➤ Enterprise Funds

- Positive Impact
- \$1,387,200 over 20 years
- \$69,400 annually

FS16-427

Alternative Actions:

- **Approve** the Annexation
- **Deny** the Annexation



Zone Changes:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia

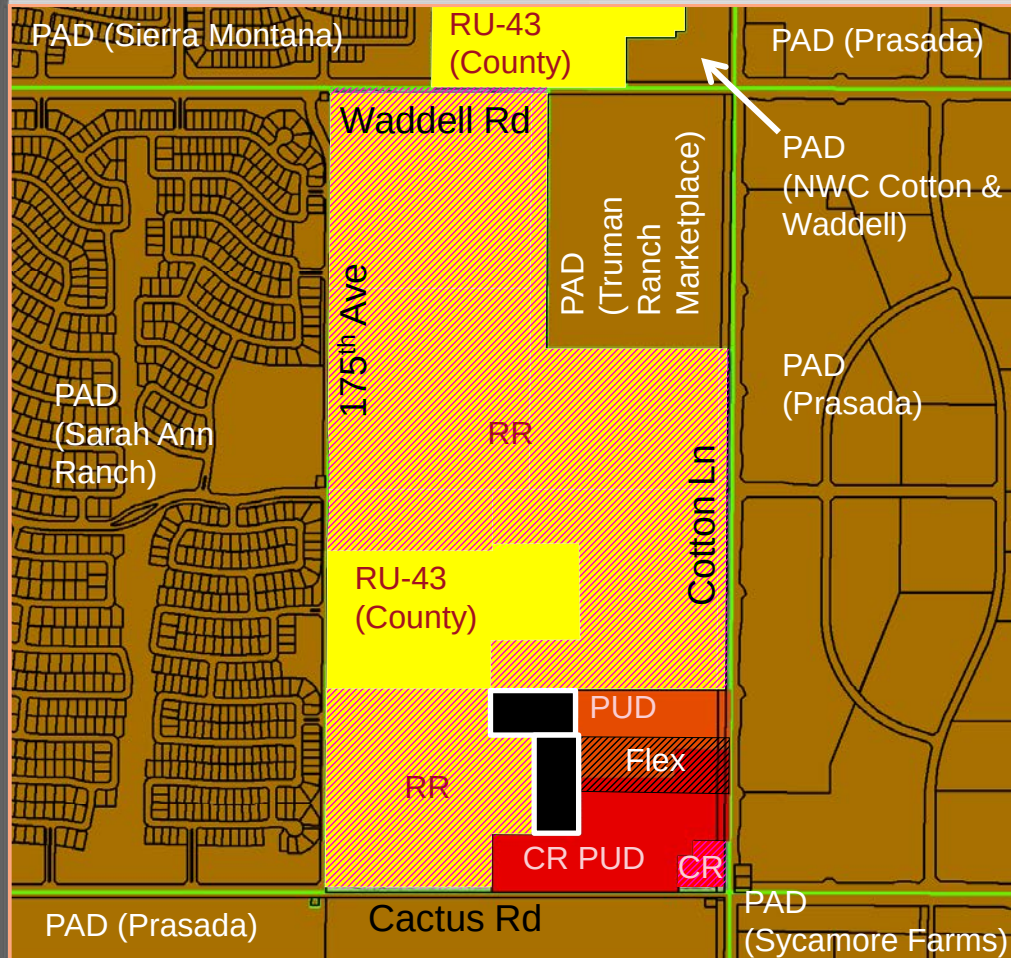


Zone Changes:

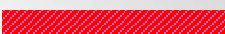
1st Zone Change Request:

➤ FS16-392 Magnolia

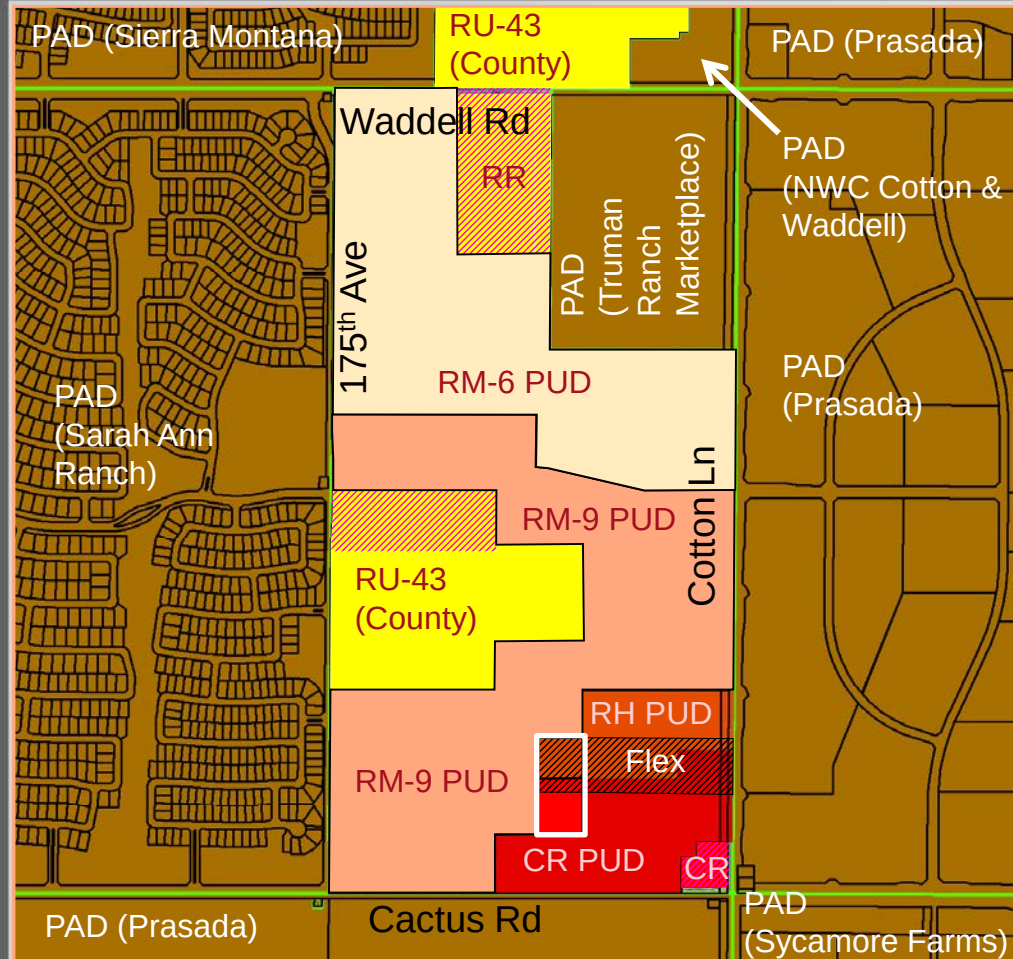




Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning*
-  Post-Annexation Surprise CR Zoning*
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning



- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning

Zone Change



FS16-392

Table 1: RM-6 FUD and RM-9 FUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 FUD Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a FUE, in which case the minimum front setback for RM-9 shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.
- (4) For RM-6 FUD, single-story minimum setback is 15', and two-story minimum setback is 20'.
- (5) For cluster product in the RM-9 FUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.





PRIMARY ENTRY MONUMENT



ENTRY FEATURE IN MEDIAN



PRIMARY ENTRY PLAN VIEW (COTTON LANE & SWEETWATER AVE)

LVA urban design studio
land planning • development entitlements • landscape architecture
120 south 4th avenue • tempe, arizona 85281 • 480.994.0994

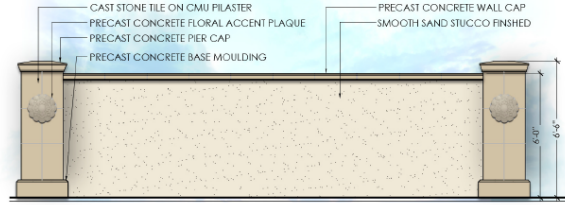
MAGNOLIA

FIGURE 6: COMMUNITY ENTRY MONUMENT

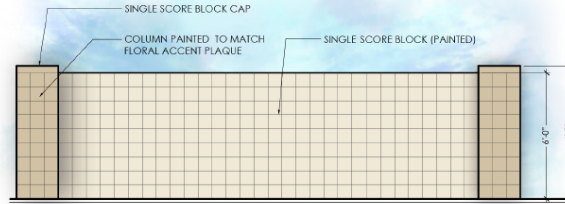
1640

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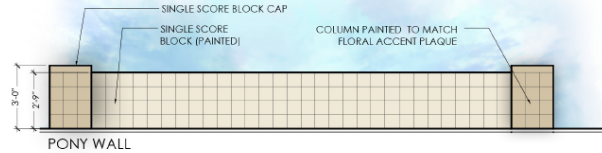
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This document, together with the concepts and designs presented herein, is an instrument of service, is intended only for the specific purpose and client for which it is prepared. Re-use of and/or changes to the design without written authorization and signature by LVA Urban Design Studio, L.L.C. shall be without liability to LVA Urban Design Studio, L.L.C.
11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 6 COMMUNITY ENTRY MONUMENT.dwg Sep 7, 2016



ENHANCED THEME WALL



THEME WALL



PONY WALL

LVA urban design studio
land planning • development entitlements • landscape architecture
120 south 4th avenue • tempe, arizona 85281 • 480.994.0994

MAGNOLIA

FIGURE 7: WALL DETAILS

APPROX. SCALES

1640

DRAWN BY: PR



11/16/16

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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



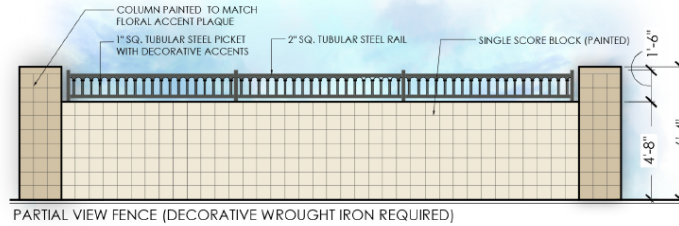
FS16-392

Monuments and Walls

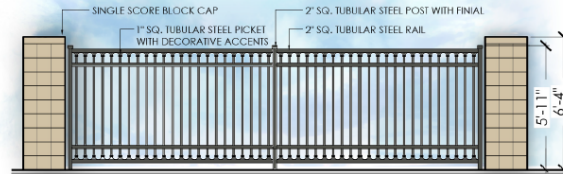


FS16-392

Monuments and Walls



PARTIAL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)



FULL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)

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MAGNOLIA

FIGURE 7A: WALL DETAILS

APPROX. SCALE(S)

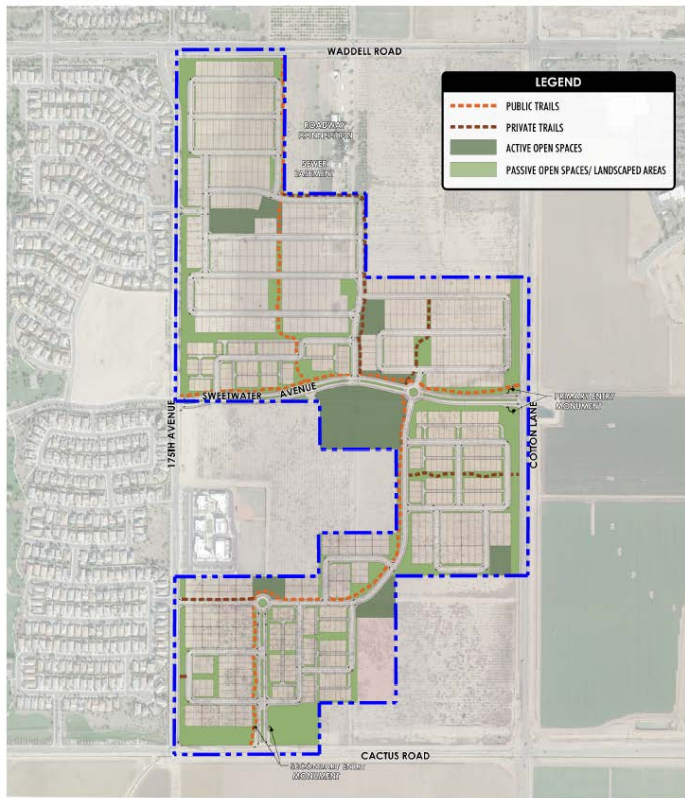
1/40

DRAWN BY: PE



11/0/16

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 6/1/16 MAGNOLIA/CD/PLANNING/LVA-160 FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016



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175TH & SWEETWATER

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

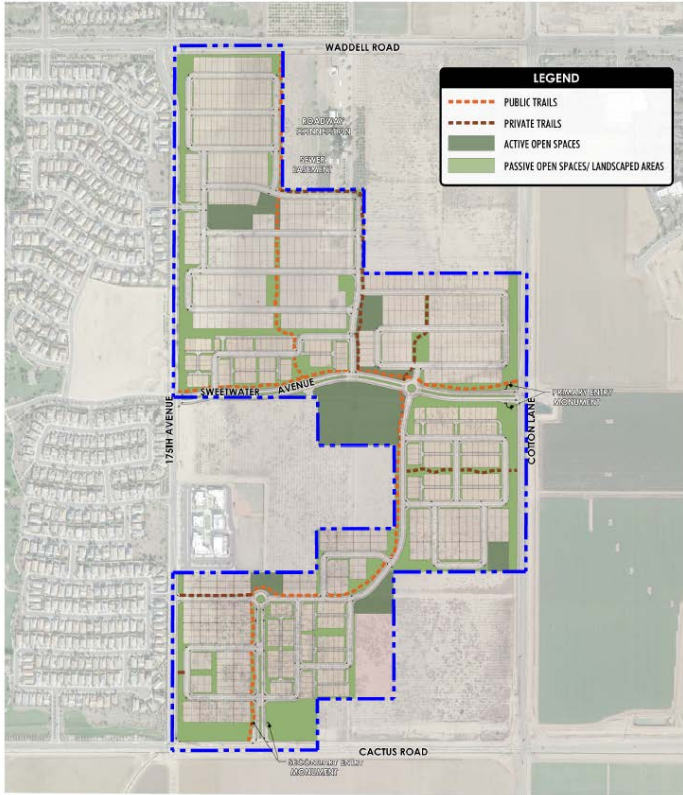
1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016

Amenities



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE(S)

1640 DRAWN BY: PR



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U:\1040-MAGNOLIA\LAND PLANNING\LVA-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Rev 2, 2015



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MAGNOLIA

FIGURE 5: TRUMAN COMMUNITY CENTER SKETCH CONCEPT

APPROX. SCALE(S)

1640 DRAWN BY: PR



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U:\1040-MAGNOLIA\LAND PLANNING\LVA-1040-FIGURE 5-TRUMAN COMMUNITY CENTER SKETCH.dwg Aug 30, 2015



FS16-392

Amenities

Commission Recommendation:

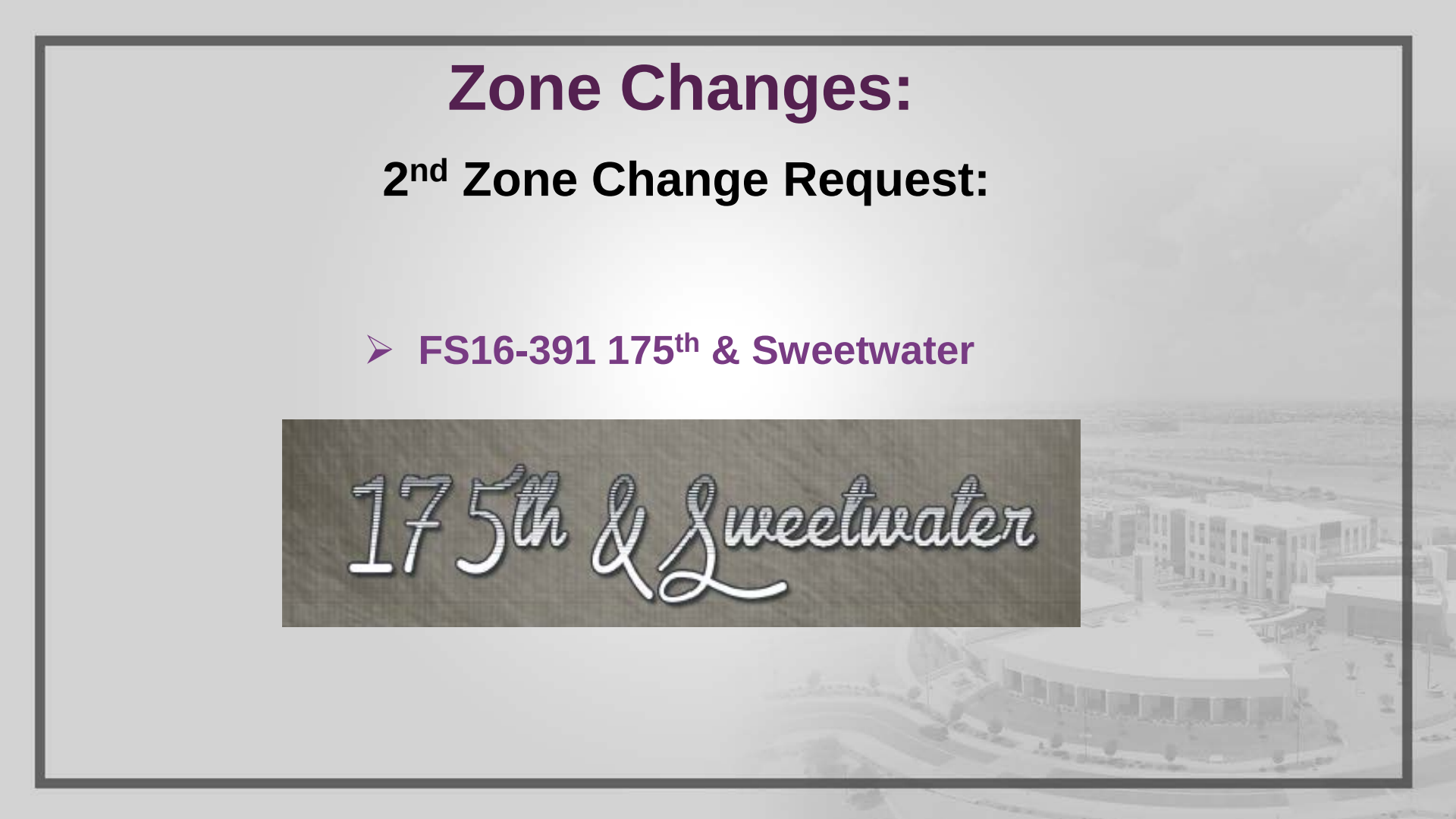


- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”

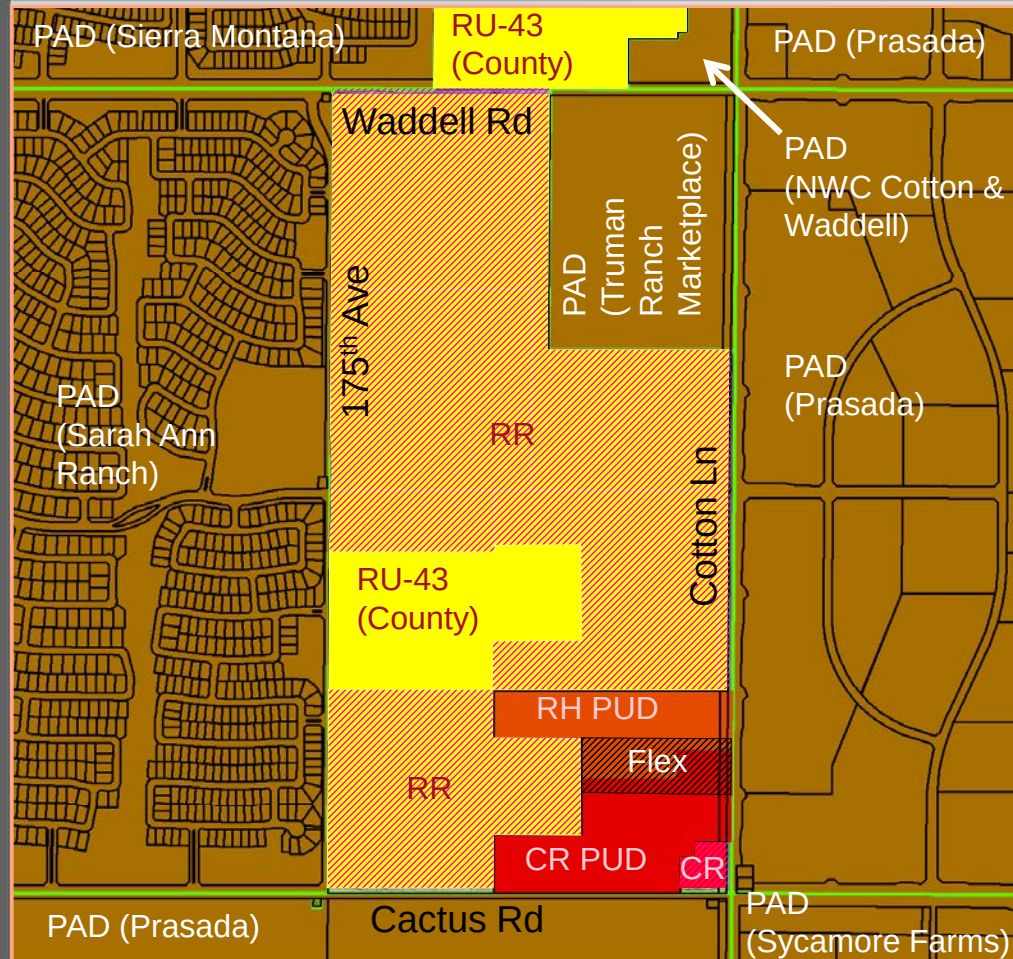
Zone Changes:

2nd Zone Change Request:

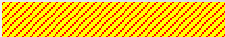
- **FS16-391 175th & Sweetwater**



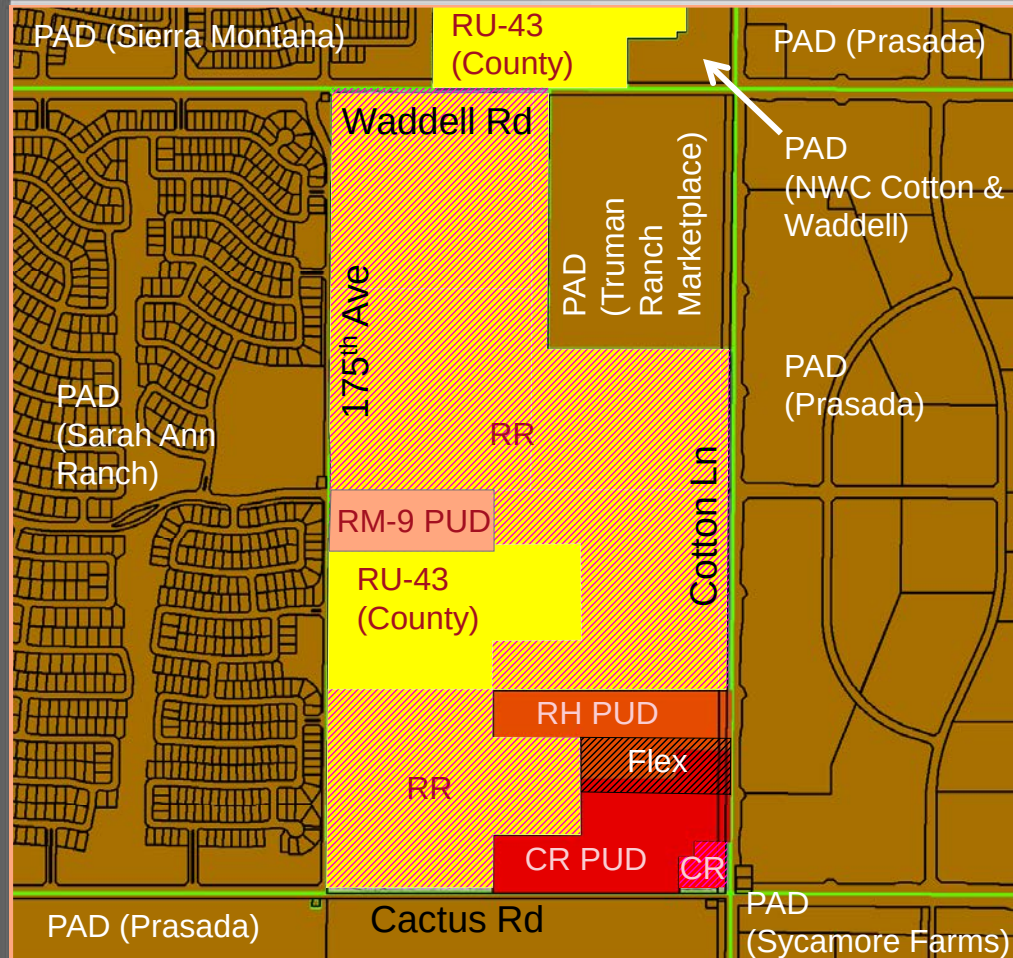
175th & Sweetwater



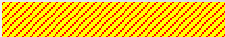
Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning*
-  Post-Annexation Surprise CR Zoning*
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

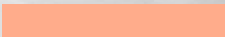
*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

175th & Sweetwater
FS16-391

-  Proposed RM-9 PUD Zoning

Zone Change

175th & Sweetwater
FS16-391



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175TH & SWEETWATER

FIGURE 3: DEVELOPMENT PLAN CONCEPT

APPROX. SCALE: 1/8" = 1'-0"

1640 DRAIN BY: PR



11/2/14

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11/16/14 ANR0014/CAD/P/ANN0014-1405-FIGURE 3 DEVELOPMENT PLAN CONCEPT.dwg Rev. 2, 2016

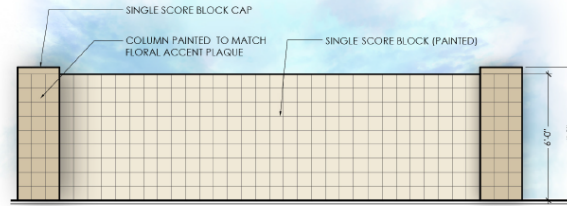
Table 1: RM-9 FUD Development Standards

Development Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35

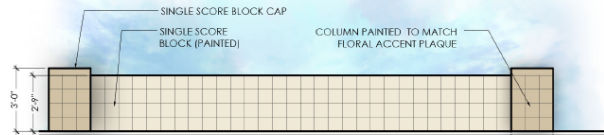
Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a FUE, in which case the minimum front setback shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.

Monuments and Walls



THEME WALL



PONY WALL

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”

Preliminary Plats:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia



Preliminary Plats:

1st Pre-Plat request:

➤ **FS16-392 Magnolia**



LEGAL DESCRIPTION

THAT PORTION OF THE NORTHEAST QUARTER AND THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2, WEST OF THE GILA AND SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA DESCRIBED AS FOLLOWS:

COMMENCING AT A BRASS CAP FOUND AT THE SOUTHWEST CORNER OF SAID SECTION 14, FROM WHICH A BRASS CAP FOUND AT THE SOUTH QUARTER CORNER OF SAID SECTION 14 BEARS SOUTH 89°48'58" WEST, 2,645.91 FEET.

THENCE ALONG THE SOUTH LINE OF SAID SOUTHWEST QUARTER, SOUTH 89°48'58" WEST, 1,566.22 FEET TO A POINT THAT LIES 1,566.24 FEET EASTERN OF THE SOUTH QUARTER CORNER OF SAID SECTION 14, THENCE NORTH 00°12'02" WEST, 33.00 FEET TO A POINT ON THE NORTH LINE OF THAT 33.00 FOOT WIDE SECTION 14, THENCE ALONG THE NORTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, MARICOPA COUNTY, ARIZONA, SAID POINT BEING THE POINT OF BEGINNING.

THENCE ALONG THE NORTH LINE OF SAID DEDICATED RIGHT OF WAY, SOUTH 89°48'58" WEST, 1,089.01 FEET TO A POINT ON THE WEST LINE OF SAID SOUTHWEST QUARTER.

THENCE ALONG THE WEST LINE OF SAID SOUTHWEST QUARTER, NORTH 00°12'48" EAST, 1,295.63 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE SOUTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 1,089.01 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA, NORTH 89°48'58" EAST, 1,077.57 FEET, TO THE MOST SOUTHWESTLY SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 316.90 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 89°48'58" EAST, 594.03 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 633.80 FEET TO THE NORTHEAST CORNER OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE WESTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 570.93 FEET TO A POINT ON THE WEST LINE OF THAT REAL PROPERTY DESCRIBED AS PARCEL NO. 2 IN DOCUMENT NO. 2009-1021524, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE WESTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2009-1021524, NORTH 00°12'02" WEST, 337.04 FEET TO A POINT ON THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14, SOUTH 89°48'58" WEST, 1,089.01 FEET TO AN ALUMINUM CAP, MARKED PLEN RLS 421377 FOUND AT THE CENTER OF SAID SECTION 14.

THENCE ALONG THE WEST LINE OF SAID NORTHEAST QUARTER, NORTH 00°12'48" EAST, 2,607.85 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 33.0 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 810.02 FEET TO A POINT ON THE EAST LINE OF THE WEST 810.02 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'48" WEST, 1,050.02 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1053.0 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 811.78 FEET TO A POINT ON THE EAST LINE OF THE WEST 1053.0 FEET OF THE EAST HALF OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'02" WEST, 633.80 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1715.99 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 1,188.86 FEET TO A POINT ON THE WEST LINE OF THE EAST 33.0 FEET OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 823.34 FEET.

THENCE CONTINUING ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 1,308.02 FEET TO A POINT ON THE NORTH LINE OF THE SOUTH 1,332.60 FEET OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 89°48'58" WEST, 958.17 FEET.

THENCE SOUTH 89°48'58" WEST, 287.98 FEET.

THENCE SOUTH 00°12'02" EAST, 633.80 FEET.

THENCE SOUTH 89°48'58" WEST, 285.54 FEET.

THENCE SOUTH 00°12'02" EAST, 348.90 FEET TO THE POINT OF BEGINNING.

SAD PARCEL CONTAINING 3,752,358 SQUARE FEET OR 173,838 ACRES, MORE OR LESS.

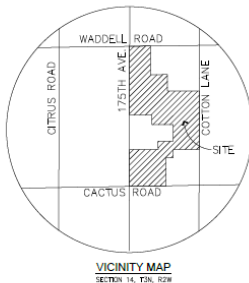
MAGNOLIA PRELIMINARY PLAT SURPRISE, ARIZONA

A PORTION OF THE EAST HALF OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA & SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA

SITE DATA

EXISTING ZONING: 110.0 A
GRID AREA: 101.4
NET AREA: 101.4
GROSS AREA: 101.4
NET AREA: 101.4
GROSS AREA: 101.4

89-48 PUD 6 89-48 PUD
110.0 A (89-48 74.5 A (89-48 105.2 A)
101.4 (89-48 74.5 A (89-48 105.2 A)
101.4
101.4
101.4
101.4



VICINITY MAP
SECTION 14, T3N, R2W
N10

FLOOD ZONE CERTIFICATION

THIS IS TO CERTIFY THAT A PORTION OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE FLOOD HAZARD AREA AS SHOWN ON THE PLAT OF SURVEY AND THAT THE REMAINDER OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE UNSHADDED ZONE. FLOOD HAZARD AREA IS SHOWN ON PARCEL NUMBER 000130048, DATED OCTOBER 16, 2013, AS PROVIDED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA). THE FLOOD ZONE BOUNDARY IS LOCATED BY SCALED MAP LOCATION AND GRAPHIC PLOTTING ONLY.

ZONE "A" AS DEFINED BY FEMA IS: SPECIAL FLOOD HAZARD AREAS INUNDATED BY THE 1% ANNUAL CHANCE FLOOD, NO LONG FLOOD DEPARTMENTS (DETERMINED).

SHADDED ZONE "X" AS DEFINED BY FEMA IS: AREAS OF 1% ANNUAL CHANCE FLOOD AREAS OF 1% ANNUAL CHANCE FLOOD WITH AVERAGE DEPTH OF LESS THAN 1 FOOT OR WHEN GRAVITATIONAL AREAS LESS THAN 1 SQUARE MILE, AND AREAS PROTECTED BY LEVEES FROM 1% ANNUAL CHANCE FLOOD.

DEVELOPER

SURPRISE ALIVE PARTNERS, LLC
11024 N. 28TH DRIVE, SUITE 170
PHOENIX, ARIZONA 85034

PHONE: (602) 499-0889
CONTACT: JOSEPH HADWIN
PLANNER

LIA LORAN DESIGN STUDIO
130 SOUTH ANA AVENUE
TUCSON, ARIZONA 85709

PHONE: (520) 478-5151
PHONE: (480) 994-0984

ENGINEER
SANDY EVANS AND ASSOCIATES, INC.
4600 EAST WASHINGTON STREET, SUITE 250
PHOENIX, ARIZONA 85034

PHONE: (602) 478-5151
FAX: (602) 478-5151
EMAIL: ryd@evans-inc.com

SHEET INDEX

1 COVER SHEET
2 DETAIL AND CROSS SECTIONS
3-14 PRELIMINARY PLAT
15-17 BORING AND MARKING PLANS
18-20 SOLID WASTE COLLECTION ROUTE

BASIS OF BEARING

SOUTH 89°48'58" WEST, THE MEASURED BEARING BETWEEN A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND CITRUS LANE AND A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND 175TH AVENUE AS SHOWN HEREIN, UTILIZING THE LIDAR SMARTNET GPS NETWORK.

RELATIVE TO MARICOPA COUNTY, ARIZONA LOW DESCRIPTION PROJECTION.

LINEAR UNIT: INTERNATIONAL FEET
ANGULAR UNIT: GRADES PER 100
PROJECTION TYPE: LAMBERT CONFORMAL CONIC (SINGLE PARALLEL)

LATITUDE OF ORIGIN: 33°15'00" N
CENTRAL MERIDIAN: 112°15'00" W
FALSE NORTHING: 1,500,000.000 IN
FALSE EASTING: 2,500,000.000 IN
STANDARD PARALLEL SCALE: 1.000000 (EXACT)

BENCHMARK

2 INCH CITY OF SURPRISE BRASS OR WITH RAISED DATUM POINT - MARKED CITY OF SURPRISE BENCHMARK 2017 1008.7 - LOCATED ON TOP OF GRANITE CURB APPROXIMATELY 700 FEET NORTH OF THE INTERSECTION OF CACTUS ROAD AND CITRUS LANE ON THE EAST SIDE OF CITRUS LANE.

ELEVATION 1246.65 NORTH AMERICAN VERTICAL DATUM 1988 (NAV88)

LEGEND

- CENTERLINE
- RIGHT OF WAY
- PROPERTY LINE
- EASEMENT
- ELECTRICAL
- GAS
- SANITARY SEWER
- TELEPHONE
- WATER
- OVERHEAD ELECTRICAL
- FLOW LINE
- IRRIGATION LINE
- PUD
- VALVE
- STORM DRAIN
- SEWER MANHOLE
- SEWER CLEANOUT
- EXISTING ELEVATION CONTOUR
- FLOW ARROW
- SIGN
- WATER VALVE
- FIRE HYDRANT
- GRADE BREAK
- MATCH LINE
- PARCEL LINE
- FLOODPLAIN UNITS



FS16-392

Preliminary Plat

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

ANNEAL CASE #
P16-4-07
DRAWING CASE #
P16-3-392

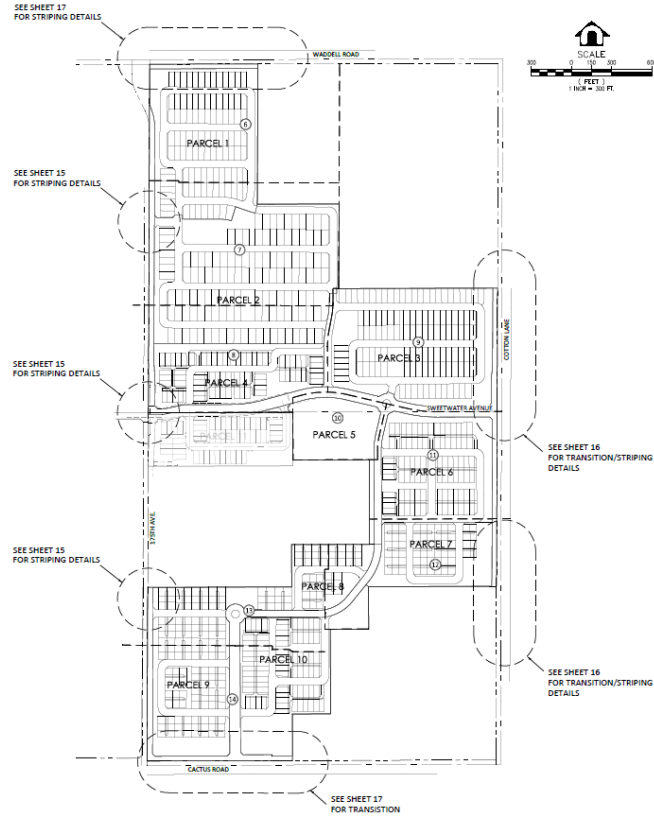
SECTION 14
TOWNSHIP 3N
RANGE 2W

JOB NO.
A00000002

1 SHEET
OF 20



Primary Plat

[illegible]

Preliminary Plat



FS16-392

- 812 Lots Total
 - 215, 45' x 110 Standard Lots in the RM-6 PUD Zoning District
 - 125, 55' x 115' Standard Lots in the RM-6 PUD Zoning District
 - 224, Alley Loaded Lots in the RM-9 PUD Zoning District
 - 248, Cluster Lots in the RM-9 PUD Zoning District

Preliminary Plat



FS16-392

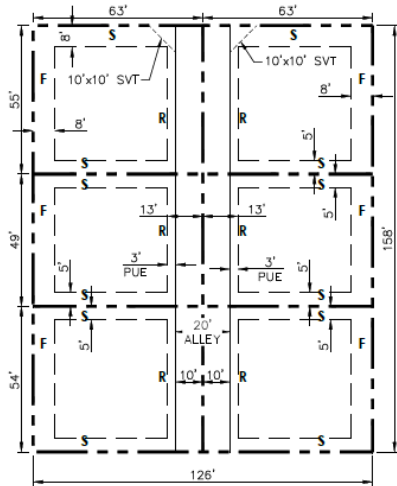
- Will integrate with 175th & Sweetwater Project
- Phase I must plat concurrently with 175th & Sweetwater Project or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities with the 175th & Sweetwater project and be part of a combined Magnolia HOA

Preliminary Plat

FS16-392



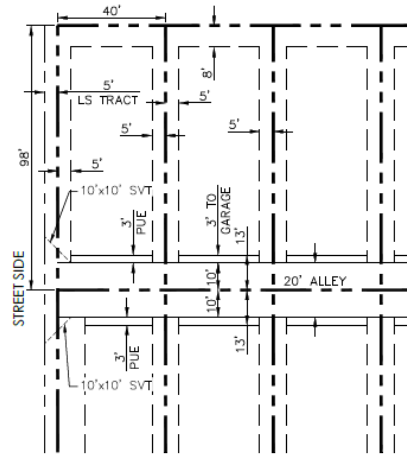
CLUSTER PRODUCT



F	= FRONT YARD
R	= REAR YARD
S	= SIDE YARD

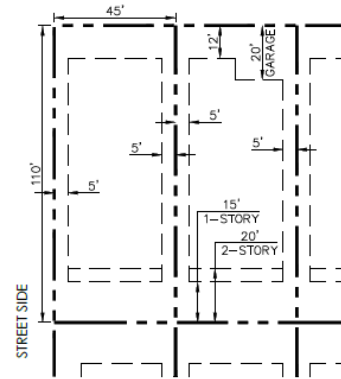
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
STREET SIDE:	8' (10' WHERE ADJACENT TO AN 8' PUE)
REAR: (ALLEY)	13'

ALLEY PRODUCT (3,920 S.F.)



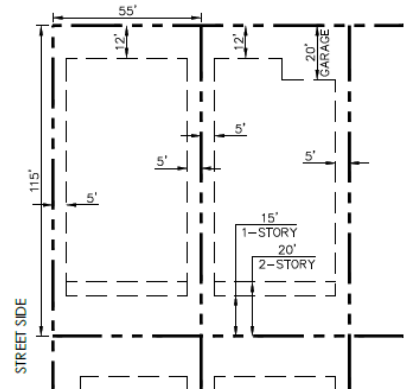
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
REAR: (ALLEY)	13'

45' X 110' LOT SIZE (4,950 S.F.)



FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

55' X 115' LOT SIZE (6,325 S.F.)

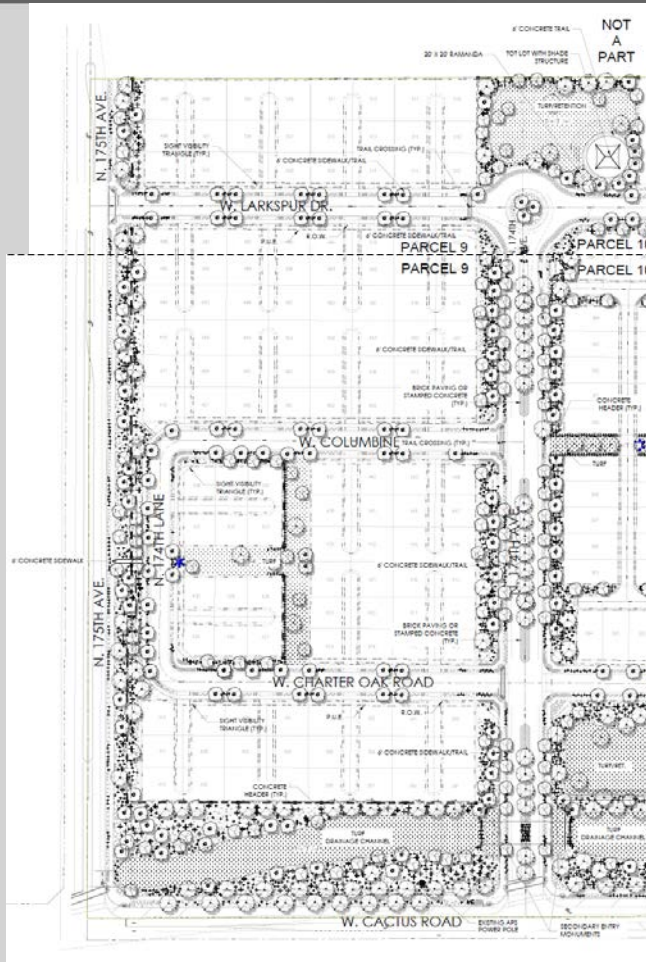


FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

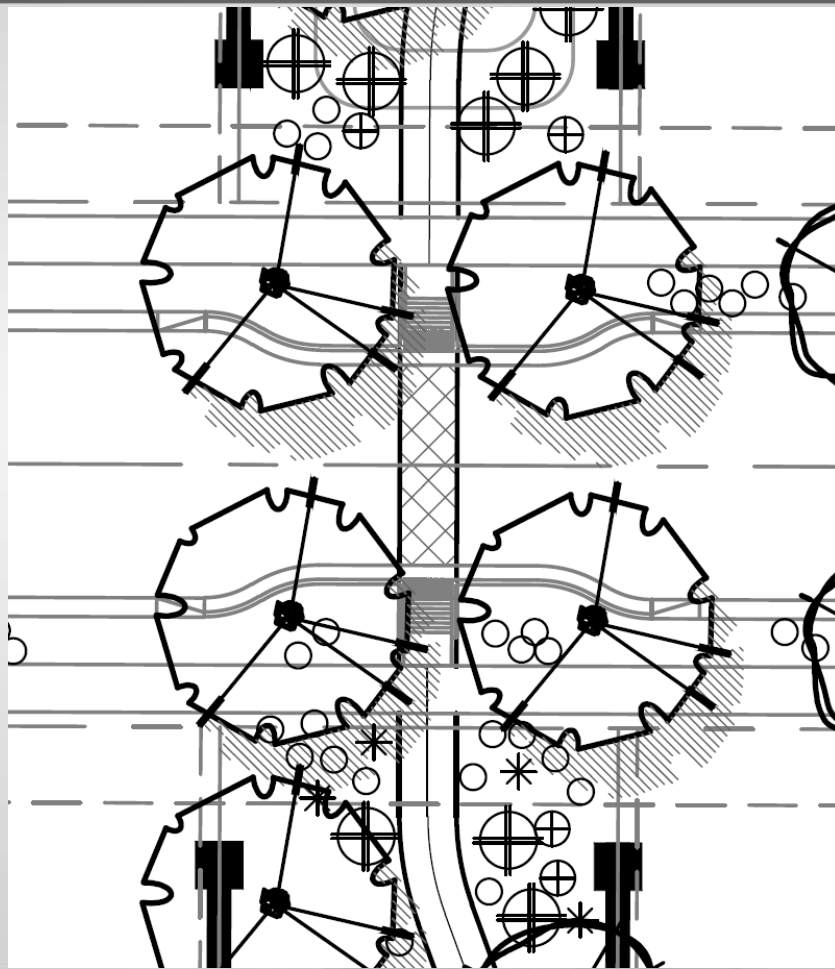
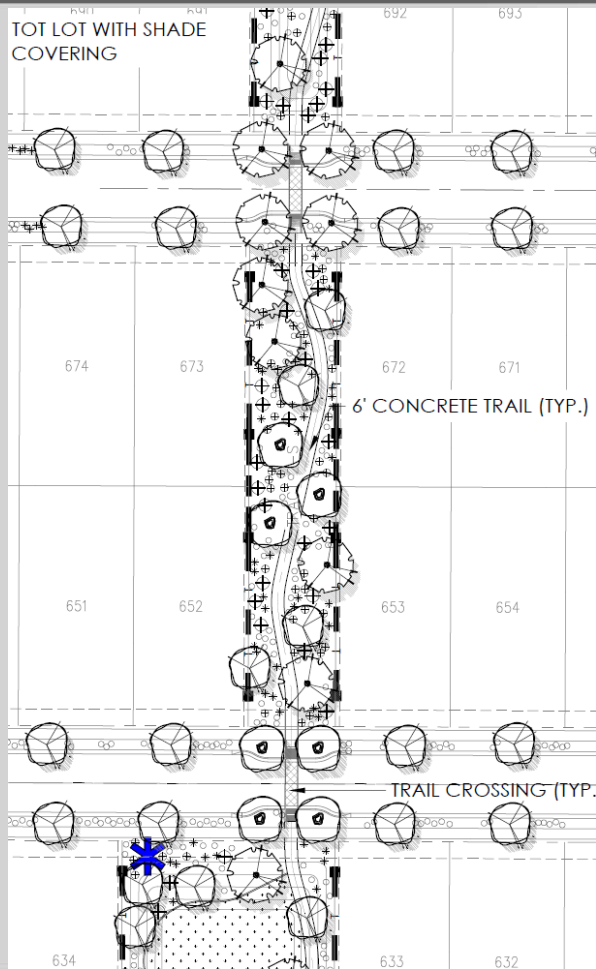


FS16-392

Preliminary Plat



TOT LOT WITH SHADE
COVERING



FS16-392

Preliminary Plat



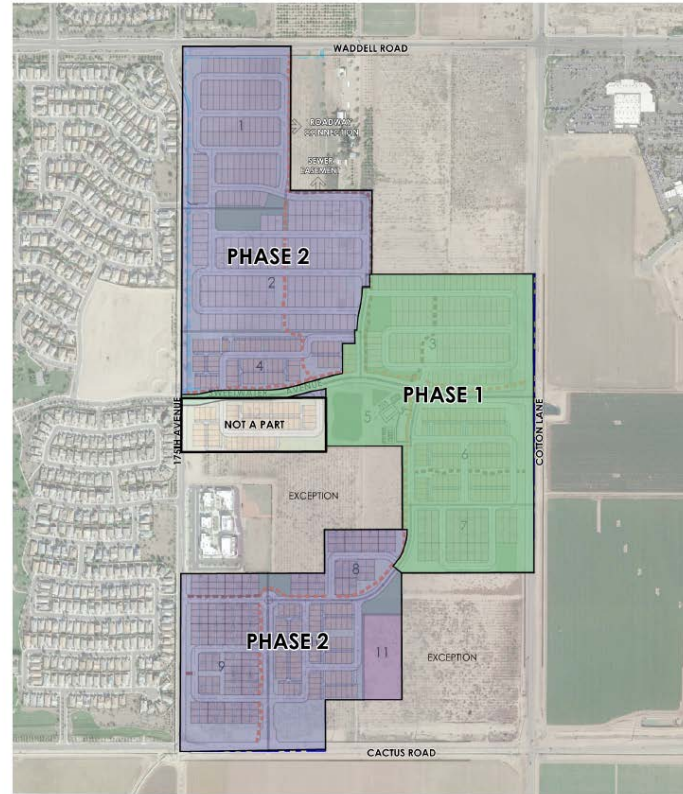
FS16-392

Preliminary Plat



FS16-392

Preliminary Plat



LVA urban design studio
 land planning • development entitlements • landscape architecture
 120 south oak avenue • tempe, arizona 85281 • 480.794.0994

MAGNOLIA

FIGURE 8: CONCEPTUAL PHASING PLAN

APPROX. SCALE: 1/8" = 1'-0"

1/8" = 1'-0"

DRAWN BY: PR



9/8/16

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 U:\1640-MAGNOLIA\CD\PLANNING\1640-FIGURE 8-CONCEPTUAL PHASING PLAN.dwg Sep 8, 2016

Commission Recommendation:



- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

Preliminary Plats:

2nd Pre-plat request:

- ## ➤ FS16-391 175th & Sweetwater

17 5th & Sweetwater

Preliminary Plat

175th & Sweetwater
FS16-391

- 49 Alley Loaded Lots in RM-9 PUD Zoning District
- Will integrate with Magnolia
- Must plat concurrently with Magnolia Phase I or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities and be part of the Magnolia HOA

175th & Weethaler
FS16-391

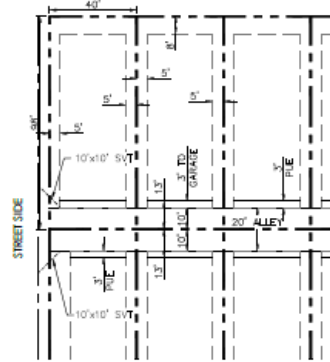


Preliminary Plat

175th & Sweetwater
FS16-391

ALLEY PRODUCT (3,920 S.F.)

FRONT STREET



FRONT:	8' 110' WHERE ADJACENT TO AN 8' PUBL
SIDE:	5'
REAR: (ALLEY)	13'

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



Commission Recommendations*:

* Assumes prior City Council approval of related annexation)



175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change** –
Approve subject to stipulations “a” through “c”
- **FS16-391 175th & Sweetwater Preliminary Plat** –
Approve subject to stipulations “a” through “g”



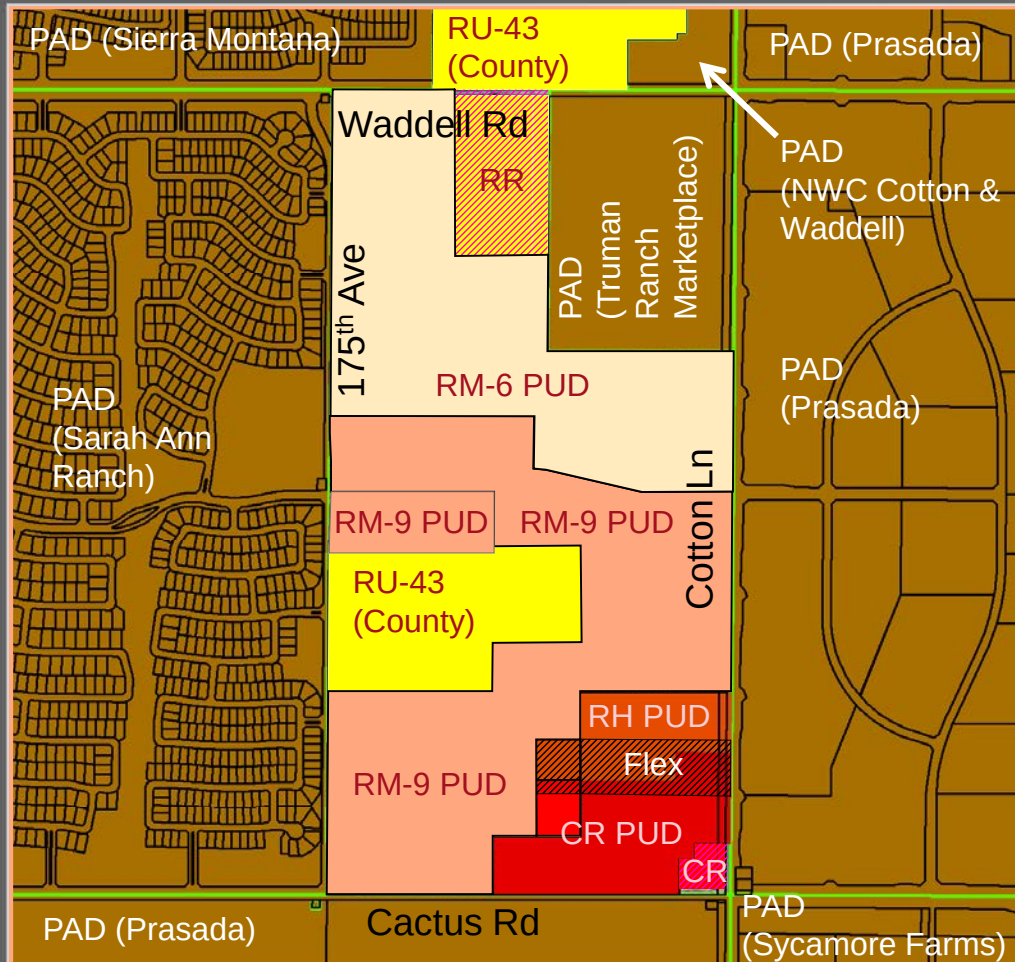
- **FS16-392 Magnolia Zone Change** –
Approve subject to stipulations “a” through “c”
- **FS16-392 Magnolia Preliminary Plat** –
Approve subject to stipulations “a” through “h”



SURPRISE
ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



Zone Change

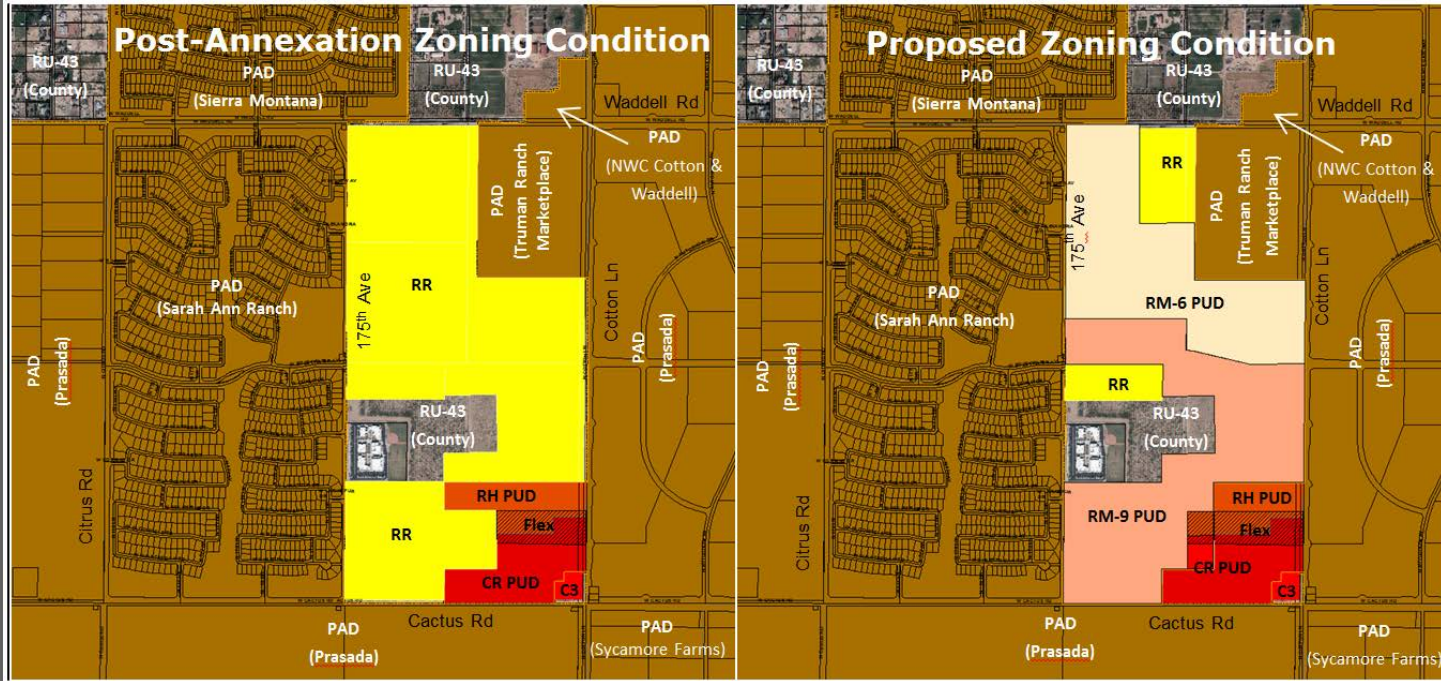
- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning



175th & Sweetwater
FS16-391

- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning

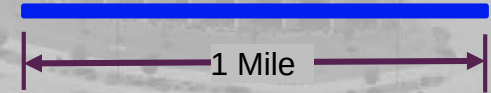
FS16-392 Magnolia Rezone

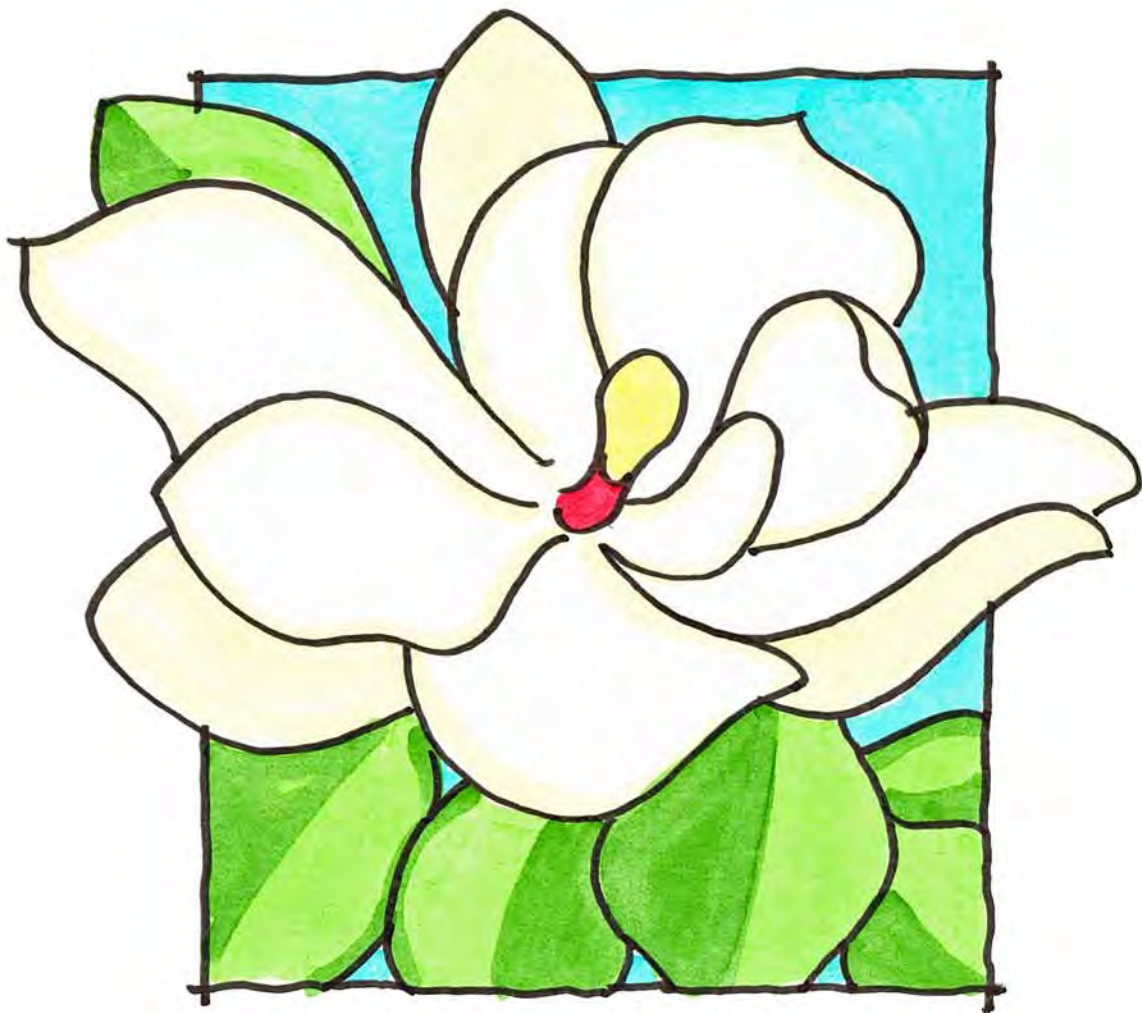


Case Map



North





MAGNOLIA

A MASTER PLANNED COMMUNITY
SURPRISE, ARIZONA
PUD ZONING APPLICATION
DECEMBER 2016

LVA urban design studio
land planning • development entitlements • landscape architecture
120 south ash avenue • tempe, arizona 85281 • 480.994.0994



DAVID EVANS
AND ASSOCIATES INC.



CivTech

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1.0 DESCRIPTION OF REQUEST

1.1 Introduction

On behalf of Surprise Village Partners, LLC, Managed by AZ Community Development, LLC, LVA Urban Design Studio, LLC is requesting a zone change on 178 acres of property currently zoned R1-43 to approximately 78.6 acres of RM-6 PUD, approximately 95.2 acres of RM-9 PUD, approximately 1.8 acres of RH-PUD and approximately 2.4 acres of CR-PUD. Note that approximately 2.3 acres within the RH-PUD and CR-PUD is in a flex zone which allows the flexibility for either zoning district based on the final site plan configuration. This request includes a PUD Overlay on the entire 181 acres located at the northeast corner of Cactus Road and 175th Avenue. The site is an irregular-shaped parcel located ½ mile west of the Loop 303 freeway, and is bounded by Cactus Road to the south, Cotton Lane to the east, Waddell Road to the north, and 175th Avenue to the west. See **Figure 1**, *Vicinity Map* for the property boundary and general location and **Appendix A**, *Legal Description and ALTA Surveys* for the legal boundaries of the property. Concurrent with this request, the applicant will be submitting an Annexation application and a Preliminary Plat for the property as well. Note that a companion zoning application and preliminary plat is also being processed for an additional 10-acre property at the southeast corner of 175th Avenue and Sweetwater Avenue. Upon annexation and rezoning, the intent is to include this parcel within the overall Magnolia master planned community.

1.2 Project Overview and Zoning Request

The proposed project, called Magnolia, will be developed as a highly amenitized, single-family residential master planned community within an active growth area of the City of Surprise. Magnolia will include a blend of various lot sizes, a centralized community center, abundant active and passive open spaces, a connected trail system, and attractive landscaping throughout. The land use plan will provide for a density transition from south to north, with slightly higher densities within the southern portion of the property. The residential zoning for the property will include RM-9 PUD for the southern portion of the property, and RM-6 PUD for the northern portion of the property, using the Conventional Character Pattern. See **Figure 2**, *Proposed Zoning Map* for the location of the zoning district boundaries. The RM-9 PUD and RM-6 PUD zoning designations are affiliated with the following minimum lot sizes:

- RM-9 PUD: 3,000 square foot minimum lot size
- RM-6 PUD: 4,900 square foot minimum lot size

The plan also includes a 4.2-acre commercial and high density residential parcel that will be combined with the commercial and high density residential property at the northwest corner of Cactus Road and Cotton Lane. This is being included to facilitate a private land exchange agreement between property owners to provide more efficiency and better connectivity within each development project. The 4.2-acre property will be zoned to conform to the approved zoning of the adjoining property in accordance with Ordinance 2010-13, which includes RH-PUD, CR-PUD, and a Flex-Zone overlay. (See **Figure 2**, *Proposed Zoning Map* for the CR-PUD and RH-PUD district boundaries and flex-zone location). Also, see **Appendix G: Land Exchange Parcels Legal Description** for the location of the two 4.2 acre properties affiliated with the land exchange.

Magnolia will include up to 900 residential units (plus an additional 55 units within the adjacent 10-acre parcel at Sweetwater and 175th Avenue), with a maximum gross density of 5.0 dwelling units per acre. This is consistent with the 2-8 dwelling units per acre density range permitted within the Neighborhood General Plan Land Use designation. While lot sizes may vary with the final development plan (and can vary without triggering an amendment to the zoning, so long as they meet the minimum development standards defined in **Table 1**), the concept plan includes a mix of the following lot sizes:

- 55' x 115'
- 45' x 110'
- 40' x 98' alley product
- 50' x 63' cluster product (lot sizes vary slightly within each 6-pack cluster pod)

1.3 Residential Zoning Designations and Development Standards

The residential zoning designation affiliated with the property will use the Conventional Character Pattern in accordance with **Section 122-33** of the Surprise Unified Development Code. The PUD overlay designation shall be applied to the property to allow modification of various development standards proposed within the community. Unless specifically modified herein, the development of the property shall comply with **Chapter 122** of the Surprise Municipal Code as may be subsequently amended. In the event of a conflict between a development standard, provision or regulation between the Magnolia Rezoning application and the Surprise Municipal Code, the standard within this rezoning application shall prevail.

The property includes two single family residential zoning districts, including 78.6 acres of RM-6 PUD, and 95.2 acres of RM-9 PUD. The proposed residential development standards affiliated with the RM-6 PUD and RM-9 PUD zoning districts to be modified are provided in the table below. Note that only “red” text items include modified standards. These amended development standards were created based on the anticipated lot sizes and product types proposed within the community in concert with the creation of meaningful, connected open space and a community design that emphasizes a high quality visual appearance throughout the community. One of the possible design features that may be provided within the community is an alley-loaded and/or cluster product where the vehicle garages are accessed off a rear alley or private drive, de-emphasizing the garage from public view, creating an attractive, pedestrian-oriented environment from the public realm. If provided, the alleys and/or private drives will be a minimum of 20' in width (10' on either side of the lot line) with 3' concrete ribbon on either side (26' minimum between structures), with the garage door at the back of the concrete ribbon. This design standard supports the 13' rear setback requirement proposed in the RM-9 PUD standards.

Table 1: RM-6 PUD and RM-9 PUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1) (2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

(1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a PUE, in which case the minimum front setback for RM-9 shall be 10').

(2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.

(3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.

(4) For RM-6 PUD, single-story minimum setback is 15', and two-story minimum setback is 20'.

(5) For cluster product in the RM-9 PUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.

1.4 Residential Development Plan Concept

The development plan concept represented in **Figure 3** is non-regulatory and subject to change without triggering an amendment to the zoning, but has been provided to graphically illustrate how the property may be developed, including roadway access and connectivity, relationship between individual development parcels and lot configuration, location of the community center and active and passive open spaces, trail connectivity, and relationship of uses and improvements along the perimeter of the property. The development plan concept represented in **Figure 3** includes a mix of four single-family detached lot sizes, including two conventional single-family residential lot types, an alley-loaded product that provides vehicle access from a rear alley and pedestrian access from the public street or common open space courtyard, and a 6-pack cluster product that provides vehicular access from an internal private drive and pedestrians access from the public street or within a common open space courtyard. The alley product and cluster product allow for a smaller lot size, while ensuring that garages do not dominate the streetscape. The front doors and livable space within these home types faces the public

street or common open space, creating an attractive streetscape environment that is oriented toward pedestrians rather than vehicles and garage doors. Garage doors are located within an alley or private drive, and are shielded from public street view. Wide landscaped open spaces corridors are provided at primary entries to the community, creating an attractive, open feel for residents and visitors as they enter and circulate through the neighborhoods.

The layout was designed in a more traditional grid street system, with wide open space corridors and connectivity, providing pedestrian circulation separate from the primary roadway alignments in many locations. The community center is centrally located within the community along Sweetwater Avenue, providing centralized pedestrian and vehicular access to all residents, and ensuring its high visibility as the primary amenity for Magnolia. The perimeter of the community is designed to minimize lots that back up to the adjacent public streets by providing several no-load local streets and/or wide landscape setbacks between the perimeter streets and the homes within the community. This will prevent the monotony of long, perimeter walls and rooftops along the perimeter of the property, and will create a much more open and attractive streetscape to the community, from both internal and external to the site. See **Figure 3, Development Plan Concept** for a visual representation of a conceptual development plan option for Magnolia.

1.5 Circulation Plan

Magnolia is surrounded on all four sides by existing streets, including Cactus Road on the south, Cotton Lane on the east, Waddell Road on the north, and 175th Avenue on the west. Cactus, Cotton, and Waddell are all classified as Major Arterial streets with a 68' half-street right-of-way. 175th Avenue is classified as a Residential Collector with a 40' half-street right-of-way. Additionally, Sweetwater Avenue, a planned Residential Collector with a full 80' right-of-way section, will be dedicated and constructed to provide east/west access through the center of the site.

Magnolia proposes a minimum of five access points into the community, including two full movement access points at Cotton Lane and Sweetwater and at 175th Avenue and Sweetwater. A three-quarter turn movement intersection is proposed at Cactus Road and 174th Avenue (limiting left-turns out). At least two additional full movement access points are proposed along 175th Avenue to provide local connections to the development.

Three roadway modifications are requested as part of this development, including the following:

- Traffic Circles on Sweetwater Avenue and on 174th Avenue: A 4-way traffic circle at intersection of Sweetwater Avenue and 172nd Drive and a 3-way traffic circle at the terminus of 174th Avenue and Larkspur Drive. These are proposed as a traffic calming feature as well as a visual enhancement to the community at primary circulation routes within the community.
- Modified Local Street Section for 174th Avenue: The plan includes an option for a modified local street standard to increase the right-of-way to 80' and to provide center landscaped medians (no longer than 200-feet in length without a break) within the street section.
- Traffic Calming Techniques for Local Streets: Traffic calming chokers coupled with connected pedestrian open spaces are proposed along local streets that exceed 800' in length and approximately ten continuous homes without a break. Note that per

Section 122.33(c)(7), *Circulation*, block length may be exceeded if appropriate pedestrian and vehicular connections are provided. In all cases, there are at least two points of access for vehicles, a separate pedestrian trail connection at the choker location, and additional landscaping provided mid-block.

Details regarding each of these modifications will be submitted with the preliminary plat for the property.

A Traffic Impact Analysis for the property has been prepared and is included with this rezoning application as an **Appendix**. A series of conclusions and recommendations related to roadway improvements are provided within the study.

Bicycle lanes will be provided on Sweetwater Avenue and 175th Avenue in accordance with the City's standard detail for Residential Collector Streets to facilitate bicycle movements within and adjacent to the property. Pedestrian circulation will include a series of setback sidewalks along public streets, as well as a dedicated 6' off-street multi-use trail system that will provide pedestrian and non-motorized access and connectivity throughout the development. The trail system provides for both public trails (through a dedicated public trails easement) and private trails as shown and labeled on **Figure 4, *Open Space and Trails Master Plan***.

1.6 Landscape Theme and Community Character

The community identity is based on the Magnolia, an ancient plant genus, and one of the first flowering plants known to mankind. It's thick and waxy petals evolved to protect the flowers from damage by the beetles that it still depends upon for pollination. Widely known for its longevity and sublimely beautiful large aromatic flowers, the magnolia tree is a symbol of sweetness, purity, and the love of nature. Old fashioned elegance, inspired by this iconic flower, will characterize the design of Magnolia to create a traditional neighborhood with a landscape that exudes the timeless charm of the South where magnolia thrive. Magnolia is a place to live and celebrate the simple pleasures of life.

In addition to a limited number of Magnolia trees used in strategic and highly visible locations within the community (note that as the Magnolia tree is not included in the ADWR list of drought-tolerant species, it will not appear in the public right of way per City Code), the overall landscape theme uses elegant and traditional old-world trees and shrubs that are found on the low-water use plant list. Primary trees include Oak, Ash, and Magnolia trees; with secondary trees including Evergreen Elm, Italian Cypress, Ficus, Vitex, Bahuania, and pollen free Swan-Hill Olive trees. Aromatic white-flowering plants may include Jasmine, Citrus, Natal Plum, Gardenia, and Plumeria. Old-fashioned garden-style plants may include English Ivy, Lily, White Lantana, Indian Hawthorn, Boxwood, Pentas, Vinca, Lady Bank's Rose, Myrtle, Rosemary, Guara, and Verbena. While many of these aromatic and old-fashioned plants may be included in select locations throughout the community, due to the harsh desert climate, selected colorful desert shrubs and groundcover plants will also be included throughout. A complete list of plant materials will be provided at the time of preliminary plat, and shall conform to Chapter 122 of the Surprise Municipal Code as may be subsequently amended.

Magnolia's character and hardscape elements will include formal tones and elegant simplicity that are characteristic of traditional architecture. Entry monuments, theme walls and signage will use simple forms of stucco, single scored block, cast stone and ornamental iron. Precast concrete floral accent plaques and brick may be used as accent

materials for walls and paving. To provide a pleasing contrast with the many shades of green and white present in the plant materials, the hardscape color scheme will build a white, gray and black foundation palette, accented with bright bursts of color at focal points and in site furniture. See **Figure 6, Community Entry Monument** and **Figure 7 and 7A, Community Wall Details** for the design concept for the primary entry monument and various wall types proposed within the community.

Wall Height Modification

For lots that back up to non-residential uses, perimeter walls may be up to eight (8) feet in height with an additional two (2) feet retaining wall for a total height of ten (10) feet.

1.7 Open Space, Trails and Amenities Plan

Magnolia will provide an abundance of interconnected parks, open space and 6-foot trails that encourages walking and alternative modes of transportation within the community. The heart of the community is the 8-acre Truman Community Center, a private, HOA maintained recreation complex that will include amenities such as a community building with fitness facilities, meeting rooms, and full-service kitchen, a competition-sized swimming pool with cabanas and hot tub, and various additional recreational amenities such as tennis and pickle ball courts, sand volleyball, multi-use sport court, tot-lot playground, splash pad, picnic areas with barbeque grills, shade ramadas, a great lawn with retention, trails and landscaping. See **Figure 5, Truman Community Center Sketch Concept** for a general layout and potential amenities proposed for the community center.

In addition to the Truman Community Center, Magnolia will include several pocket parks and linear trails corridors throughout the development with active and passive recreational amenities such as tot-lots, shade ramadas, picnic areas, multi-use play fields with retention, dog park, trails, landscaping, and other active and passive improvements. All pocket parks will have access to the linear trail system that connects the development parcels within the community.

Perimeter open space and landscaping will also be provided where adjacent to public streets, including:

- **Cotton Lane:** Minimum 60' wide landscape buffer to include a drainage corridor for off-site flows, retention, landscaping and entry monument at the primary entry at Sweetwater Avenue.
- **Cactus Road:** Minimum 120' wide landscape buffer to include a drainage corridor for off-site flows, retention, landscaping and an entry monument at the secondary entry at 174th Avenue and Cactus Road. This exceeds the minimum landscape buffer requirement of 60' by double.
- **Waddell Road:** Minimum 25' wide landscape buffer from back of sidewalk to include landscaping improvements. This is a modification from **Section 122-137(e)(1), Roadway Landscape Buffer**, which requires a 60' setback for major arterial streets. This modification will impact approximately 585' of linear frontage along Waddell Road. However, there are wide, landscaped open space tracts at the intersection of Waddell Road and 175th Avenue, and along the eastern edge of the property along Waddell Road. Additionally, a decorative theme wall and enhanced landscaping will be provided along this frontage to enhance the visual character within this area.

- 175th Avenue: Minimum 40' wide landscape buffer to include landscaping and neighborhood entry monuments at the roadway entries into the community. This exceeds the minimum landscape buffer requirement of 15' by more than double.

Additional landscaped open space will be provided along several primary roadways and center landscaped medians within Magnolia. Including the Truman Community Center, pocket parks, trails, and additional active and passive open space and landscaped areas within and adjacent to the right-of-way, Magnolia will provide a minimum of 25% open space, a 5% increase in the 20% requirement per the Conventional Character Pattern standard.

Landscape Modifications

The provisions of Article X of Chapter 122 of the Surprise Municipal Code as may be subsequently amended shall apply with the following modifications related to the landscaping and hardscaping within the proposed APS Power Line Easement along the north edge of Cactus Road:

- (1) Trees, shrubs and hardscape elements which could hinder access and maintenance of the power line poles by APS should not be located within 50' of base of the poles.
- (2) The location of all trees or screening walls or the alteration of ground level within with APS Easement shall first be approved by the appropriate APS representative before permitted by the City of Surprise.
- (3) The species of all trees within the APS Easement should be limited to those currently allowed by APS under their power lines. The list and species may be added or removed at the sole discretion of APS Representatives at the time landscaping plans are presented to them for approval.

1.8 Drainage Master Plan

The site generally slopes in a southeasterly direction. 175th Avenue is an improved half street adjacent to the site. There is a street median with a full section fronting the school site and a full section at the intersection of 175th Avenue and Waddell Road. The road slopes general in a southerly direction and there is a large catch basin south of the intersection of 175th Avenue and Waddell Road that captures the street runoff into the street storm drain system.

Waddell Road is an improved street with curb on the north side and no curb along the south side of the road. The road slopes in an easterly direction.

Cactus Road alignment is a dirt road adjacent to the site that has been recently paved. The road follows the slope of the land in an easterly direction. There is an existing culvert at the intersection of 175th Avenue and Cactus Road that conveys runoff in an easterly direction. The estimated flow from the culvert is 540 cfs. There is an earthen ditch adjacent to the road alignment within an APS easement to the north that conveys the runoff from Cactus Road existing culvert and the farm field to the north towards the east. The ditch ends with earthen basin located northwest of the intersection of Cotton Lane and Cactus Road.

The site is located mostly in Zone X according to FIRM Panel 04013C1660L, revised October 2013. Portion of the site along Cotton Lane is located in Zone A. The design team is in the process of preparing a Conditional Letter of Map Revision to be submitted to the Maricopa County Flood Control District (MCFCD) and to the City of Surprise. After

approval by the City, it will be submitted to FEMA. The CLOMR application is based on the fact that the drainage conditions in the area have changed with the development upstream and there is currently less flow impacting the site. The site will have drainage channels traversing the eastern boundary (along Cotton Lane) and the southern boundary (along Cactus Road) to account for the offsite flow reaching the site.

The intent of the grading design is to convey the runoff generated onsite during a 100-year 2-hour storm event or smaller into retention basins, located throughout the subdivision. The roadways will convey the street runoff to various basins distributed throughout the development. When the street capacity is exceeded, catch basins with storm drain system will be installed to allow the runoff to stay within the street right-of-way section.

The finish floor elevations for the site will be set higher than the adjacent 100-year water elevations and the cascading outfall elevations for the site in case of storm events beyond the 100-year storm events.

The grading improvements shown on the grading and drainage plans will follow the phasing of the project. The offsite improvements will also follow the phasing of the project. The catch basin, in relation to street capacity, will be added during final design and they are not reflected on the preliminary grading and drainage plans.

1.9 Water & Sewer Master Plans

Water

The existing water infrastructure around the site is split in two zones, zone 2 and zone 3, per EPCOR description. The zone 2 is in the southeasterly side of the project along Cotton Lane, and zone 3 is in the northwest part of the project along 175th Avenue. The proposed water main serving the project as part of Zone 2 connects to an existing 12" water line, approximately 700 feet south of Waddell Road on Cotton Lane. The new main continues south, entering our project site in Sweetwater Avenue. The main is extended through the project local streets and exits the project site at Cactus Road. The 12 inch main will be extended easterly along Cactus Road to Cotton Lane, where it will connect to an existing 16" water line at the intersection. An 8" loop will be used to follow up with the balance of the water line system, to serve the project for zone 2.

Zone 3 will connect to an existing 12" water line at Sweetwater Avenue and 175th Avenue. The main will continue easterly along Sweetwater Avenue approximately 1,350 feet. This will serve an 8" loop that heads northerly and westerly through the subdivision until it connects to the existing 12" water line approximately 1,450 feet north of Sweetwater Avenue on 175th Avenue. An 8" loop will continue to serve the balance of the project.

Sewer

The sewer will connect to an existing 12" sewer line in 175th Avenue, at two locations. One connection will be made at the intersection of 175th Avenue and the southerly most proposed road, and another at the road just south of the existing school site. These connections will serve the southwesterly part of the subdivision.

Another sewer main connection will be extended to the existing 12" sewer line at the southeast corner of Cactus Road and Cotton Lane. The main will be located within Cotton

Lane, entering our subdivision approximately 1,400 feet further north into the subdivision to serve the balance of the project.

1.10 Commercial & Multi-Family Residential Zoning Designation and Development Standards

This section shall only apply to the 4.2 acre property at the southeast corner of the site that is designated as 1.8 acres of RH-PUD and 2.4 acres of CR-PUD (which also includes a flex overlay for 2.3 acres of the property based on the configuration of the final site plan for the commercial and multi-family development). This property is affiliated with the property transfer, and the development standards defined below are identical to the standards defined within the adopted zoning associated with Ordinance 2010-13, affiliated with Zoning Case# FS-10-051.

Character Pattern

The subject property shall utilize the Marketplace Character Pattern as described in Section 122-37 of the Surprise Municipal Code. Unless specifically modified herein, the development of the property shall comply with Chapter 122 of the Surprise Municipal Code.

Land Use Designations

The subject property is proposed to be developed with a mix of commercial and high density residential. The southern 2.4 acres fall under the Regional Commercial (CR) Use District while the northern 1.8 acres fall under the Residential High Density (RH) Use District. As part of the PUD overlay, flexibility of the zoning boundaries is expected. The 2.3 acre area between the two zoning districts, as shown on Figure 2: Proposed Zoning Map, shall be designated a flex zone, where the proposed zoning boundaries can be finalized at the time of the Site Plan Approval. As such, any modifications to the zoning boundaries that is within the designated flex zone shall be reviewed and approved by the Community Development Director. However, any increase to the area of land within the Residential high Density (RH) Use District shall not permit an increase to the maximum number of dwelling units beyond a total of 384 dwelling units.

Development standards as part of the PUD overlay for these districts are listed below.

Planned Unit Development Overlay

Development Standards

Unless specifically modified herein, the development of the property shall comply with Chapter 122 of the Surprise Municipal Code.

Table 2: CR-PUD and RH-PUD Development Standards

Regional Commercial (CR)					
Min. Lot Area	Min. Lot Width	Min. Front or Street Side Setback (1) (2)	Min. Side & Rear Setback (1)	Maximum Building Height	
N/A	N/A	20'	0' (3) (4)	45' (4)	

Residential High Density (RH) (5)					
Maximum Number of Dwelling Units	Maximum Gross Density	Min. Front or Street Side Setback (1) (2)	Min. Side & Rear Setback (1)	Maximum Building Height	Min. Recreational Space per D/U
384	30	20'	15' (4)	45' (4)	30%

Footnotes:

- (1) All setbacks are subject to the applicable adopted Building Codes.
- (2) Build-to-Lines are not required to be established for projects within this PUD. Minimum front and street side setbacks will be traditional and follow the table above.
- (3) A 20' minimum building setback is required for Commercial uses next to Multi-Family or Single-Family Attached Residential Zoning. A 45' minimum building setback is required for Commercial uses next to Single-Family Detached Residential Zoning.
- (4) When directly adjacent to Single-Family Detached Residential Zoning, for any commercial or residential building that exceeds a height of 35', the side and/or rear minimum setback shall have an additional distance of 1' for each 1' of building height above 35'.
- (5) These High Density Residential Development standards assume the property will develop as multi-family apartments. If a single-family attached product is developed, the minimum lot dimensions and setbacks shall be determined at the time of Preliminary Plat and/or Final Plat approval whichever comes first and shall be consistent with the Marketplace Character Pattern as described in Chapter 122 of the Surprise Municipal Code.

Parking and Loading Standards

All provisions in Article IX of Chapter 122 of the Surprise Municipal Code shall apply.

Landscape Standards

The provisions of Article X of Chapter 122 of the Surprise Municipal Code shall apply with the following additions related to the landscaping and hardscaping within the proposed APS Power Line Easement along the north edge of Cactus Road:

- (1) Trees, shrubs and hardscape elements which could hinder access and maintenance of the power line poles by APS should not be located within 50' of base of the poles.

- (2) The location of all trees or screening walls or the alteration of ground level within with APS Easement shall first be approved by the appropriate APS representative before permitted by the City of Surprise.
- (3) The species of all trees within the APS Easement should be limited to those indicated in Exhibit J, which lists the currently acceptable species of trees allowed by APS under their power lines. This list is not an absolute list and species may be added or removed at the sole discretion of APS Representatives at the time landscaping plans are presented to them for approval.

Lighting Standards

All provisions in Article XI of Chapter 122 of the Surprise Municipal Code shall apply as well as any applicable Engineering Development Standards.

Signage Standards

All provisions in Chapter 112 of the Surprise Municipal Code shall apply.

Grading and Drainage Standards

All provisions of the Engineering Development Standards shall apply. Prior to final site plan approval, a Conditional Letter of Map Revision (CLOMR) will be filed with FEMA to request a Letter of Map Revision (LOMP) to reclassify the flood zone designation to Zone X on the FIRM maps and eliminate the property from being in a flood zone.

1.11 FUTURE HOME OWNERS ASSOCIATION RESPONSIBILITY

The Magnolia community will include a home owners association (HOA) that will own and maintain all common community amenities, including the Truman Community Center, signage and entry monuments, parks, trails, open space tracts, private alleys and drives, and other common areas within the development. The HOA will include a formal governance structure to be established by the HOA bylaws and community Covenants, Conditions and Restrictions (CC&R's). In the early phases of the project, the HOA will be managed by the master developer or homebuilder until such time as there are enough homeowners take over the management responsibilities. The purchasers of property within the Magnolia community will automatically become members of the HOA and will be required to pay annual dues for the ongoing operation and maintenance of community facilities owned by the HOA. Regarding the 175th & Sweetwater project, it is the intent that this development will become part of the Magnolia community and HOA after annexation and zoning approval, however, if that does not happen, an agreement related to the dedication of all necessary right-of-way for the construction of Sweetwater will be required prior to the first phase of development of either project.

2.0. EXISTING CONDITIONS ANALYSIS

2.1 Property Location and Description

The proposed site is located on the northeast corner of Cactus Road and 175th Avenue within unincorporated Maricopa County (currently within a County island), but within City of Surprise General Planning area. More specifically, the property is an irregular shaped assemblage of parcels generally bounded by 175th Avenue to the west, Waddell Road to the north, Cotton Lane to the east, and Cactus Road to the south. The subject site is made up several parcels, as defined in **Appendix 1, *Legal Description and ALTA Survey***.

The intent is to annex the property into the City of Surprise concurrent with this rezoning application.

The assemblage of properties included in the rezoning application are owned by various property owners; however, the intent is that upon annexation and rezoning approval, all properties included within the rezoning application (with the exception of the CR/RH zoning) will be developed under a single ownership entity as part of the Magnolia master planned community. The CR/RH zoned property will be developed as part of the commercial development at the northwest corner of Cactus Road and Cotton Lane, and is included as part of a land swap to benefit both developments by removing narrow fingers on the commercial property and adding better connectivity within the residential development parcels. The following Assessor Parcel Numbers are included with this zoning application:

- APN# 502-04-004
- APN# 502-04-006A
- APN# 502-04-006B
- APN# 502-04-005D
- APN# 502-04-022D
- APN# 502-04-002E
- APN# 502-04-002Q
- APN# 502-04-023C
- APN# 502-04-022A
- APN# 502-04-002R

2.2 Existing Land Use, General Plan Designation and Zoning

The subject property is currently vacant land that was once used for agricultural purposes. Properties surrounding the site include single-family residential, agricultural and vacant land to the north, single-family residential, agricultural and vacant land of the future Prasada Commercial Complex to the east, agricultural and vacant land to the south, and single family residential property to the west. Paradise Honors School, a K-12 charter school is also located immediately adjacent to the property along 175th Avenue, and has plans to expand further east with new classroom buildings, parking, athletic fields and other associated improvements. See **Table 5** below and **Figure 1, Vicinity Map** for the existing land uses on the site and surrounding area.

The proposed site is currently within the City of Surprise 2035 General Plan boundary and is designated as *Neighborhood Character Area*. The site is also within the *Residential (Citrus and Cactus) Growth Area* as defined within the Anticipated Growth map in the General Plan. The Neighborhood land use designation allows for densities up to 8+ dwelling units per acre and supports a wide variety of residential development opportunities. The proposed zoning is in conformance with the Neighborhood General Plan designation, and will utilize the *Suburban Development Type* (2-8 du/ac) throughout the community. See **Table 5** below and **Figure 9, Existing General Plan Land Use Map** for the general plan land use designation on the site and surrounding area.

Currently, the property is zoned RU-43 (Rural 43) in unincorporated Maricopa County, permitting 1 dwelling units per acre. The intent of this zoning district is to conserve open

land use and permit farming and rural residential uses. See **Table 5** below and **Figure 10, Existing Zoning Map** for the existing zoning on the site and surrounding area.

Table 3: Existing Land Use, General Plan Designation and Zoning

	LAND USE	GENERAL PLAN DESIGNATION	ZONING DESIGNATION
SITE	Vacant	Neighborhood	County RU-43
NORTH	Single-family residential agricultural & vacant	Neighborhood	County RU-43 & PAD
EAST	Single family residential, agricultural and vacant	Commerce & Office - TOD sub area	PAD, CR PUD, RH PUD
SOUTH	Agricultural and vacant	Neighborhood	PAD
WEST	Single family residential and charter school	Neighborhood	PAD

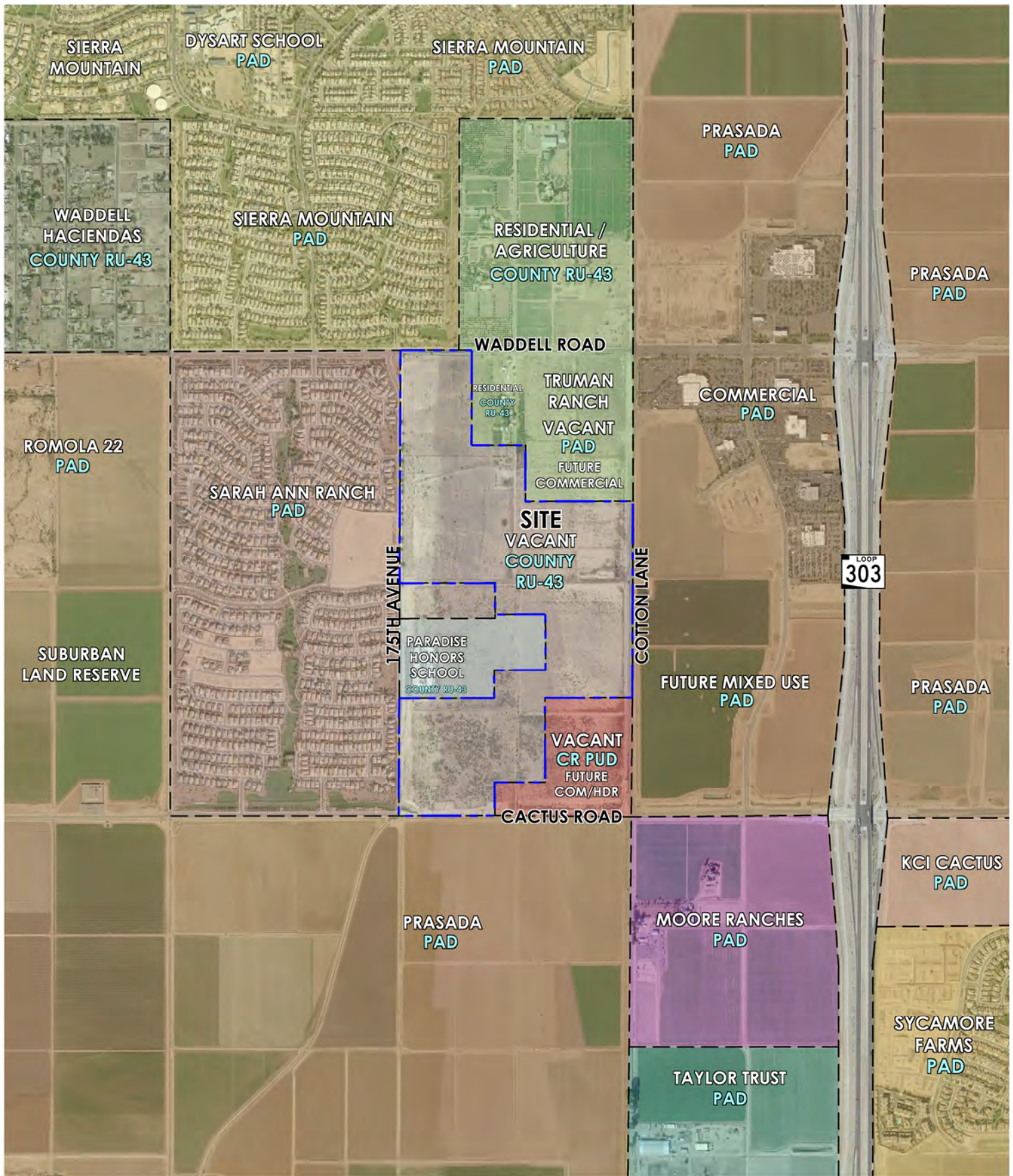
2.3 Regional Facilities and Services

The site falls within the City of Surprise Planning Boundary, but is currently located in unincorporated Maricopa County. The site is surrounded on all sides by the City of Surprise jurisdictional limits, with the exception of a portion of the northern boundary, making this property part of a County island. **Figure 1, Vicinity Map** shows the jurisdictional limits of the City of Surprise city limits in relation to lands within unincorporated Maricopa County.

The proposed property is approximately ½ mile west of the Loop 303 Freeway, with direct access to both the Cactus Road and Waddell Road interchanges, providing excellent access to the site along the regional freeway system. The site is bounded by three major arterial roads, including Cactus Road to the south, Cotton Lane to the east, and Waddell Road to the north. 175th Avenue, a Residential Collector, is located along the western boundary of the site. Sweetwater Road, a planned east/west Residential Collector road, will run through the center of the property connecting 175th Avenue to Cotton Lane.

The subject property is within the Dysart Unified School District (SUSD). The property is within the boundary of the Sonoran Heights Elementary School, located at 11405 N. Greer Ranch Parkway, and the Shadow Ridge High School, located at 10909 N. Perryville Road. Paradise School, a K-12 charter school, is also located immediately adjacent to the property at 12775 N. 175th Avenue.

Upon annexation into the City of Surprise, fire & emergency services, law enforcement services, and refuse collection will all be provided by the City. The nearest fire station, Surprise Fire-Medical Station #307, is located 2 miles east of the site near Sarival Avenue and Cactus Road. The nearest Police Station is located in Surprise City Hall, approximately 6 miles northeast of the site.



MAGNOLIA

FIGURE 1: VICINITY MAP

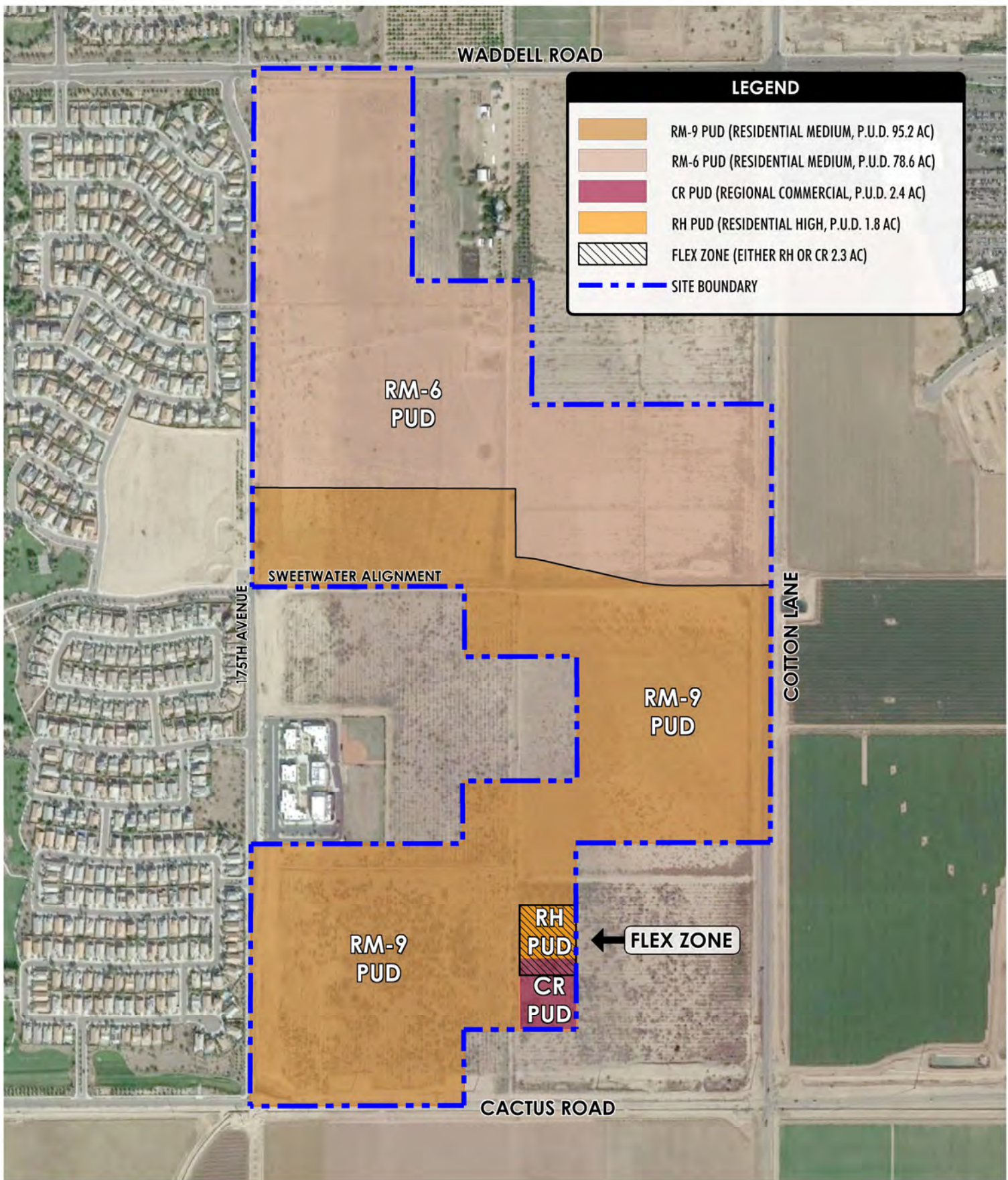
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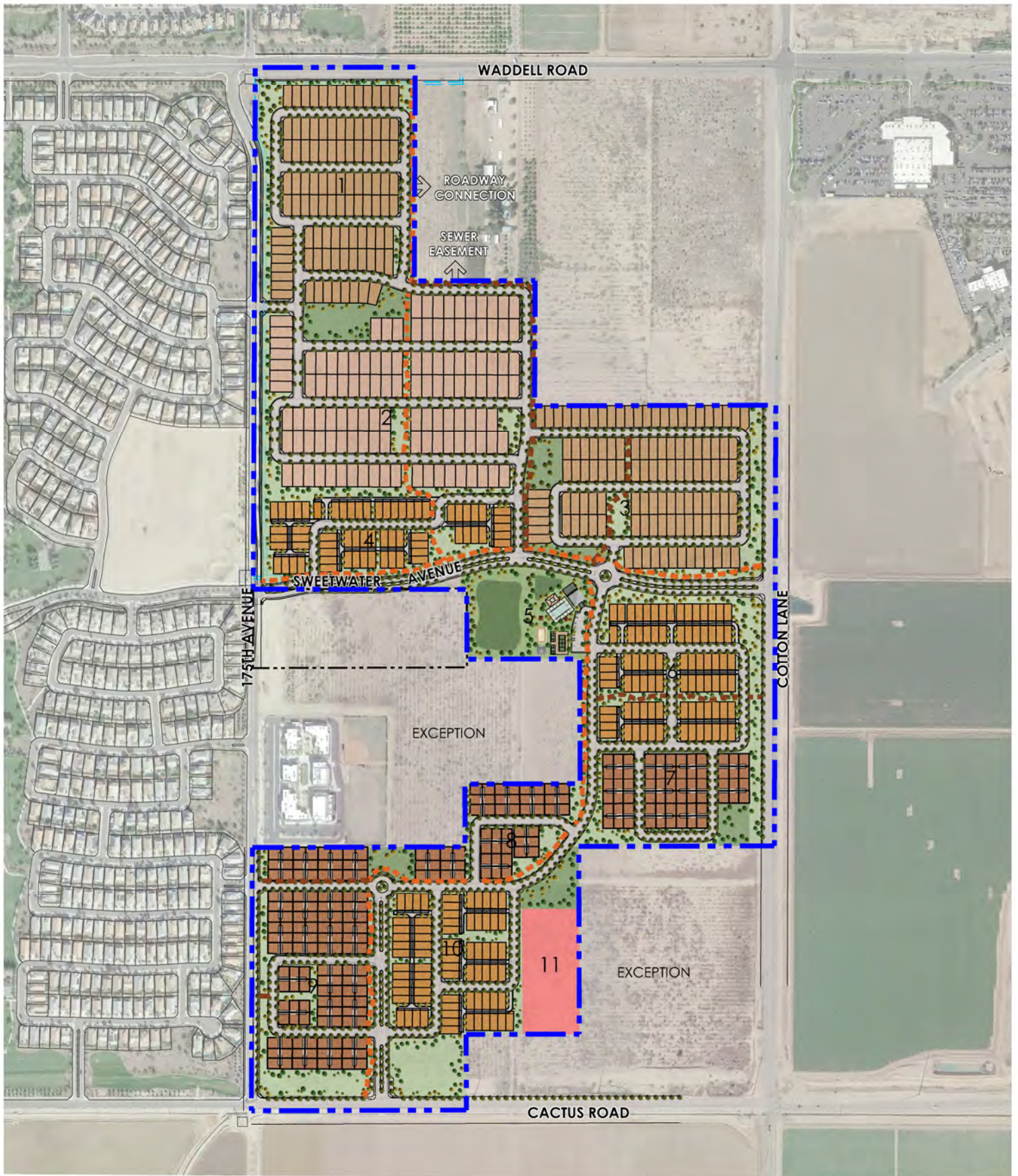
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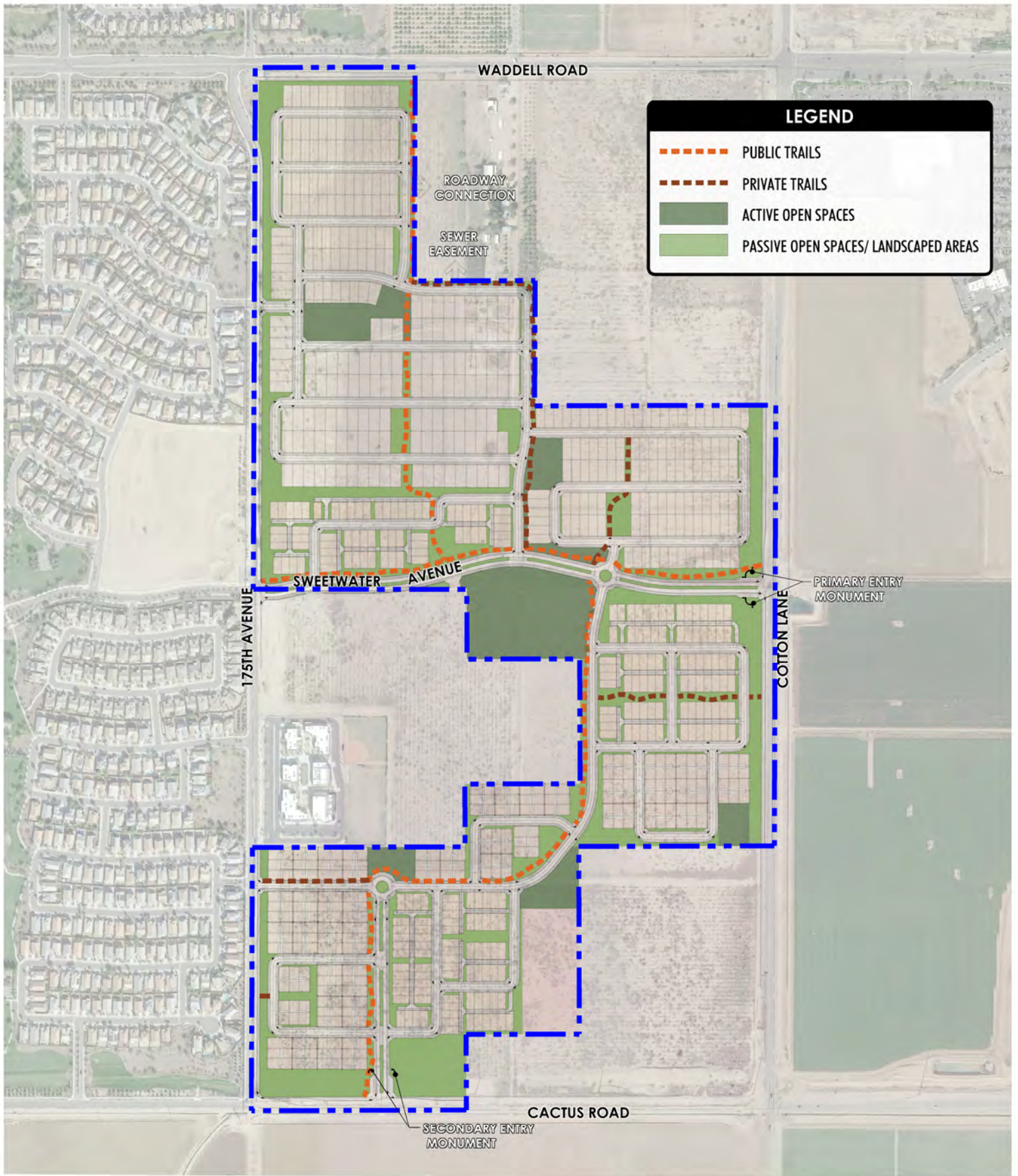
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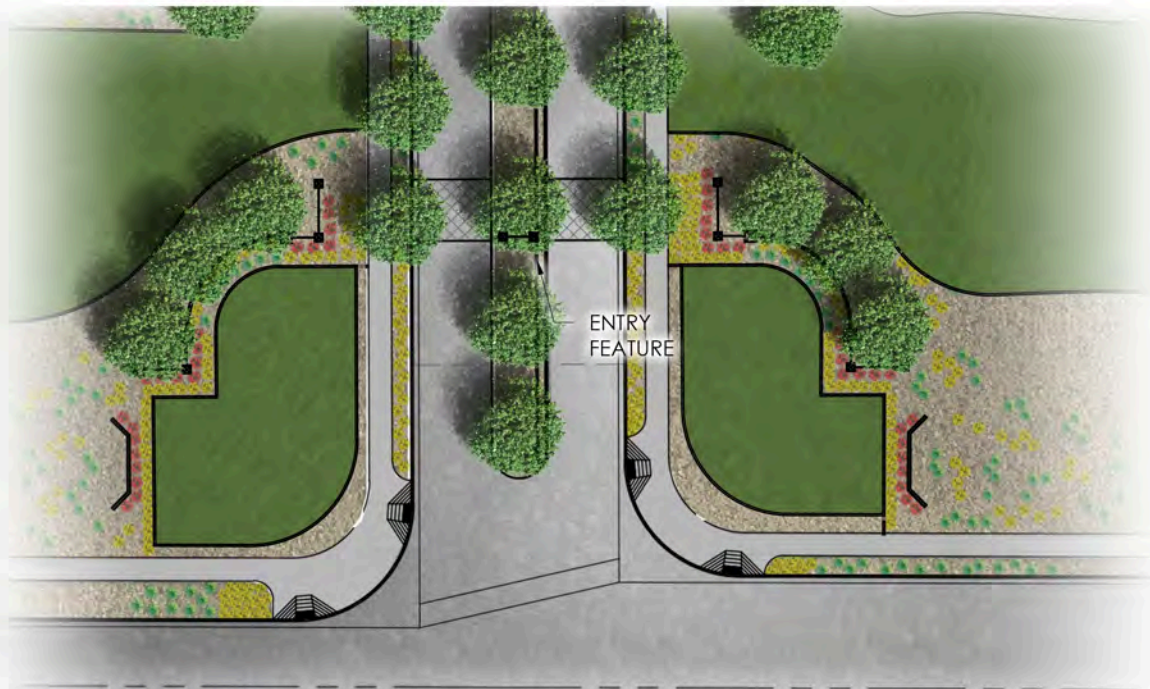




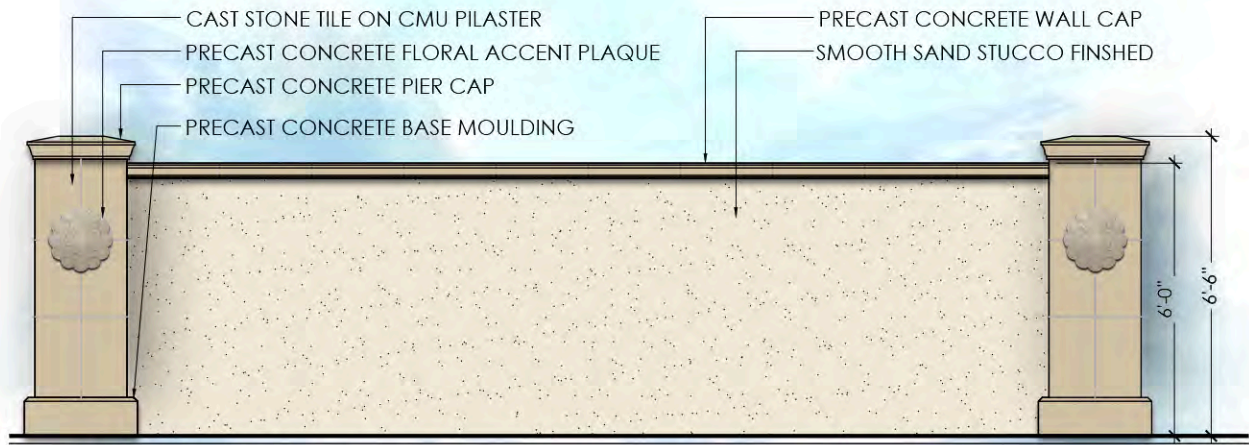
PRIMARY ENTRY MONUMENT



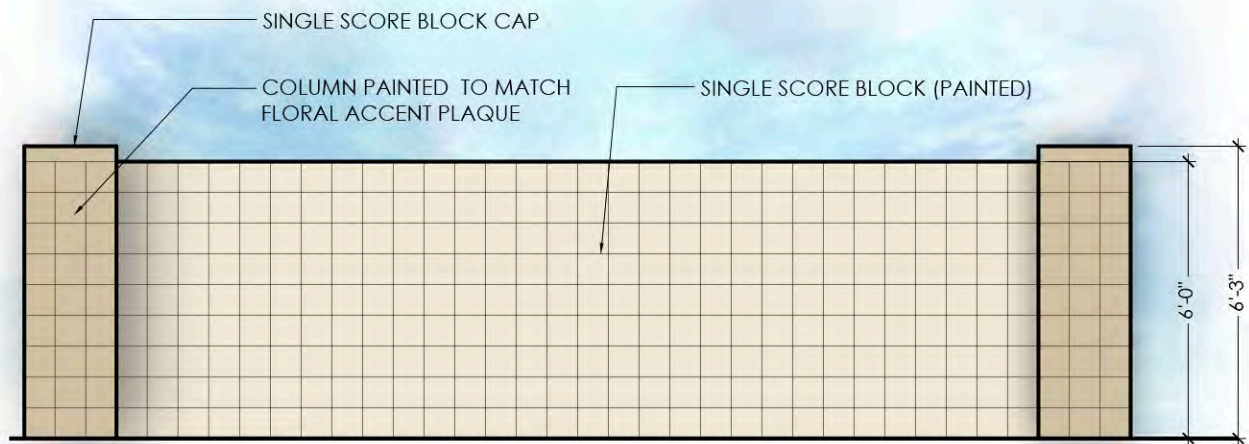
ENTRY FEATURE IN MEDIAN



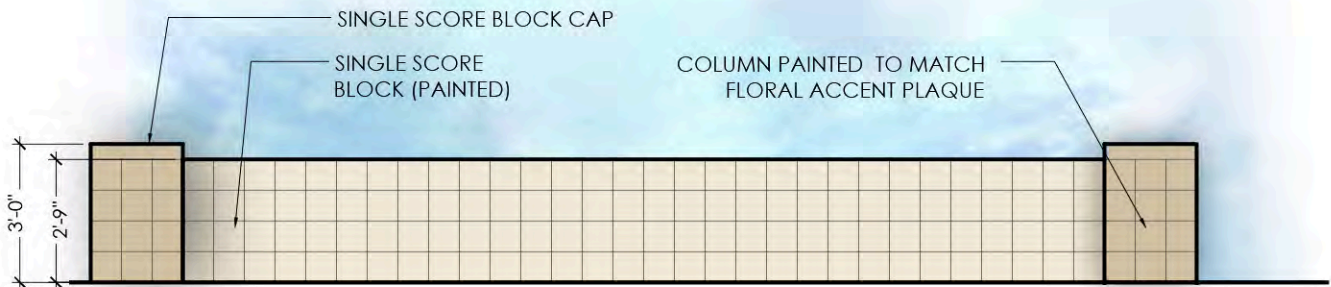
PRIMARY ENTRY PLAN VIEW (COTTON LANE & SWEETWATER AVE)



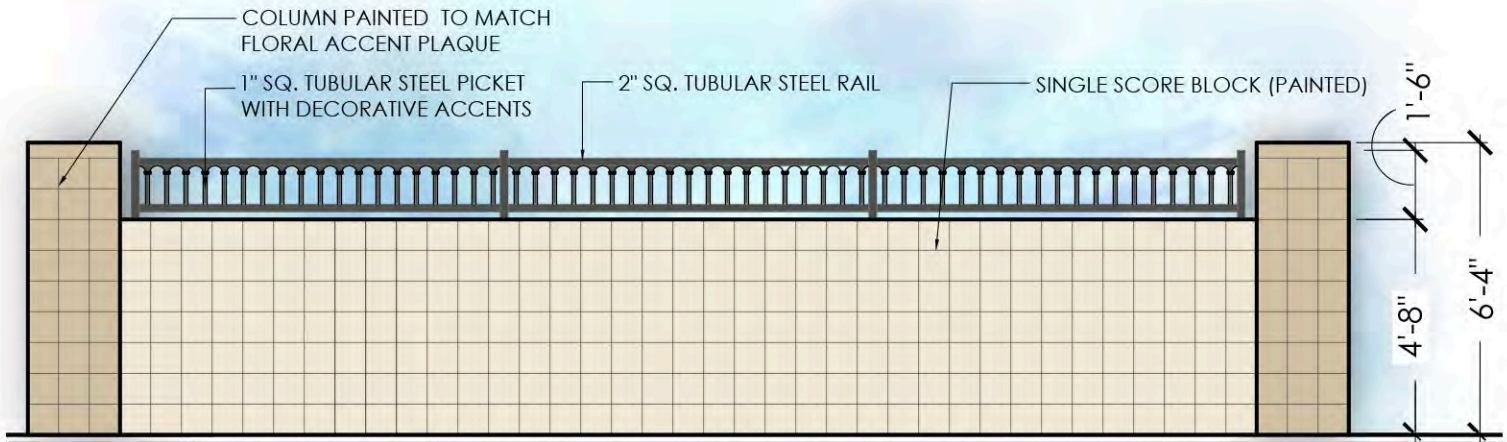
ENHANCED THEME WALL



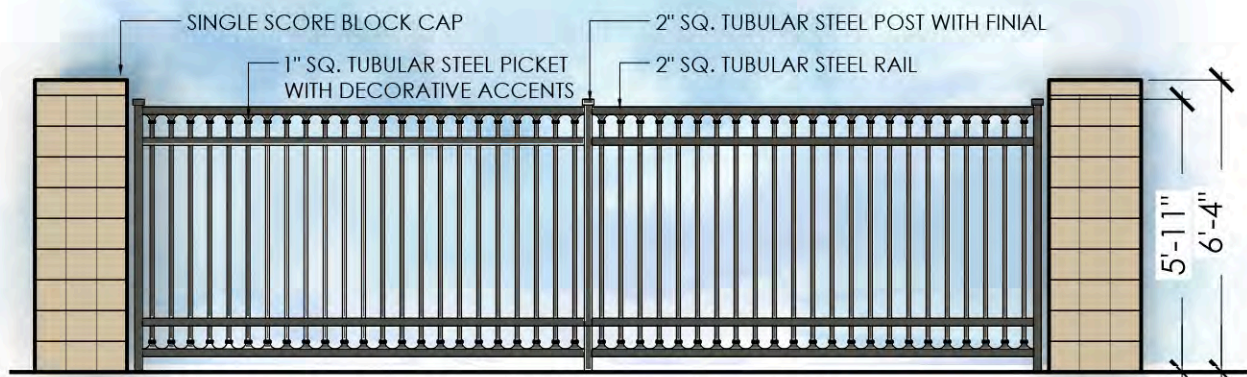
THEME WALL



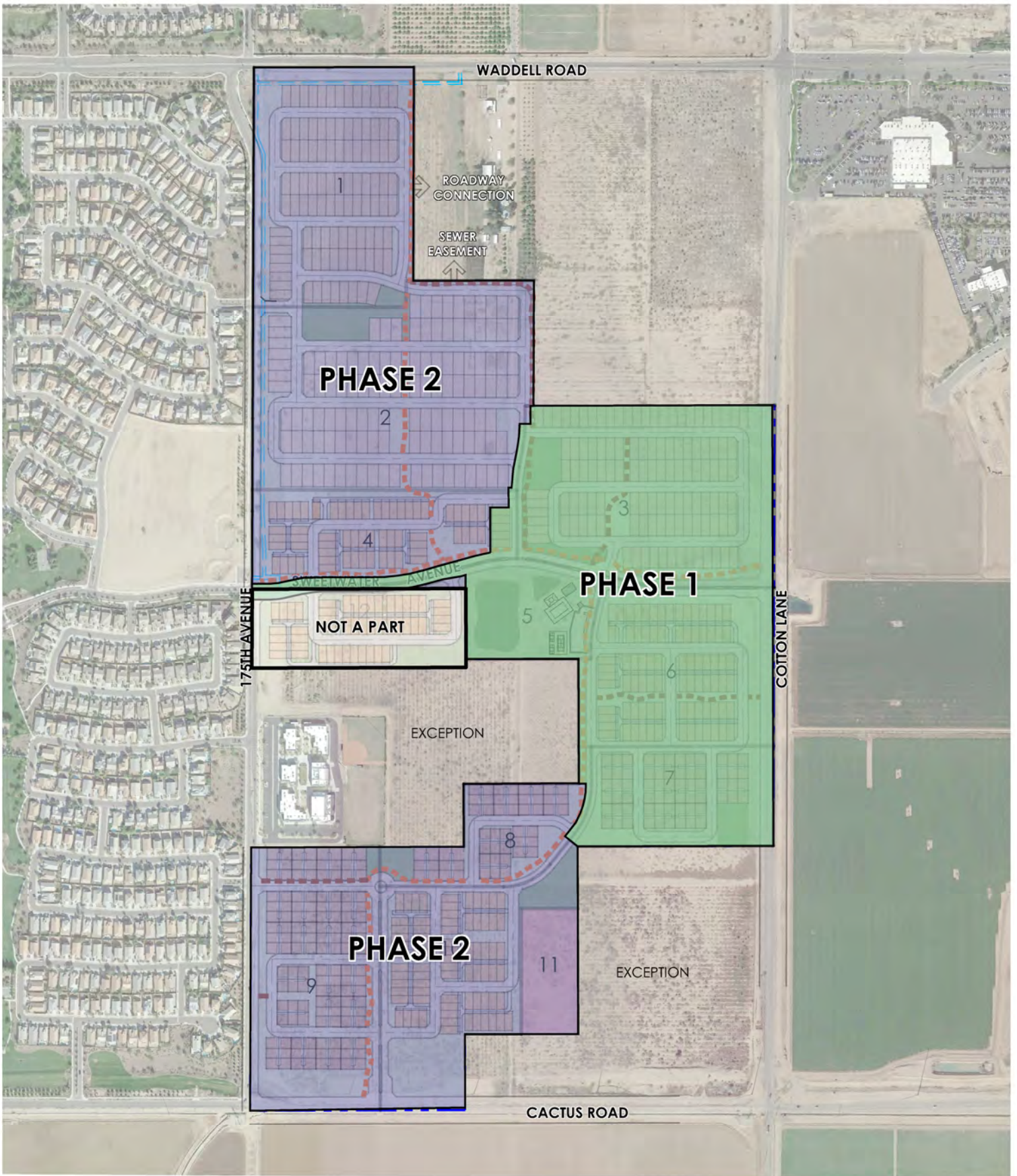
PONY WALL



PARTIAL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)



FULL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)



MAGNOLIA

FIGURE 8: CONCEPTUAL PHASING PLAN

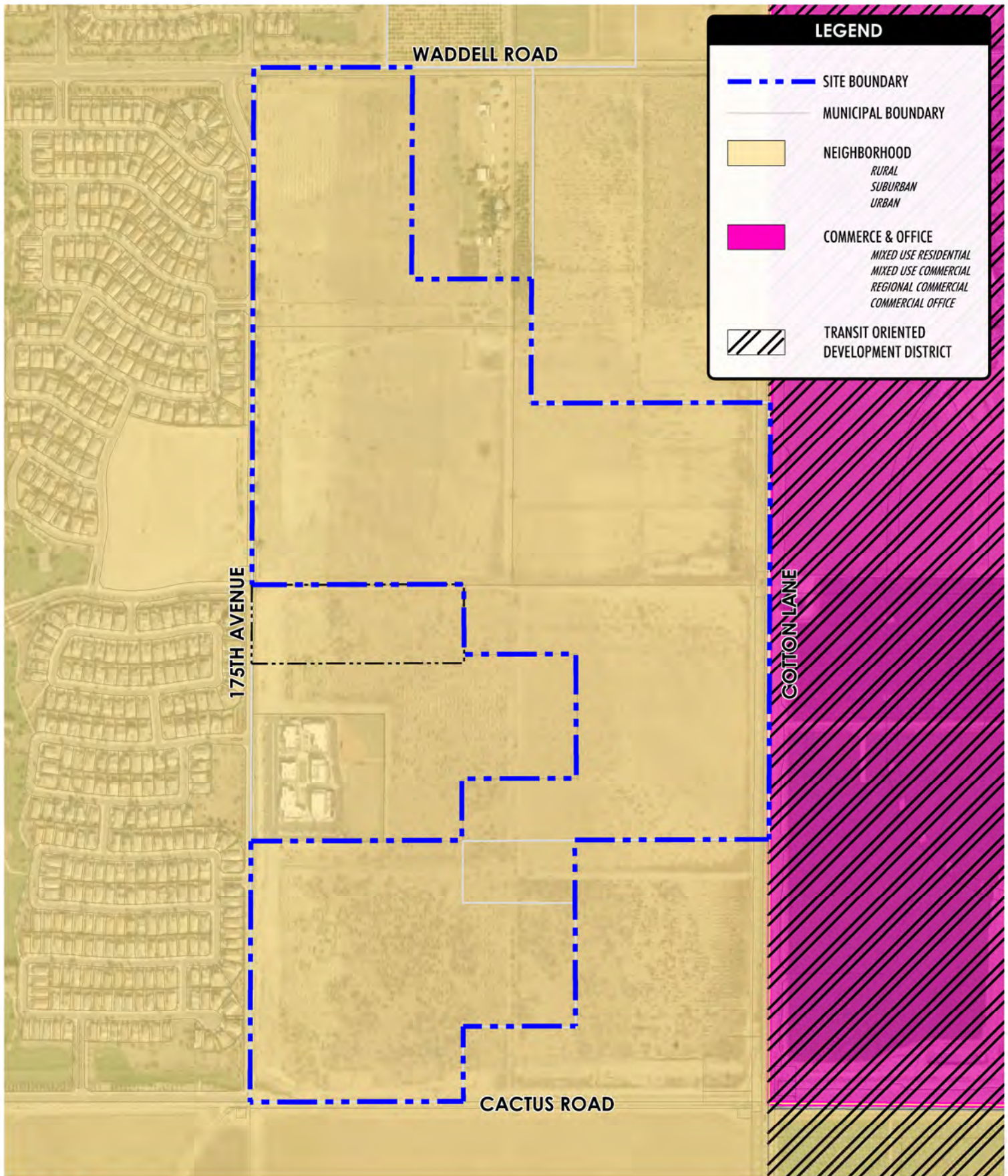
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DRAWN BY: PR



9/8/16



LVA urban design studio

land planning - development entitlements - landscape architecture

120 south ash avenue • tempe, arizona 85281 • 480.994.0994

MAGNOLIA

FIGURE 9: EXISTING GENERAL PLAN DESIGNATION MAP

APPROX. SCALE:NTS

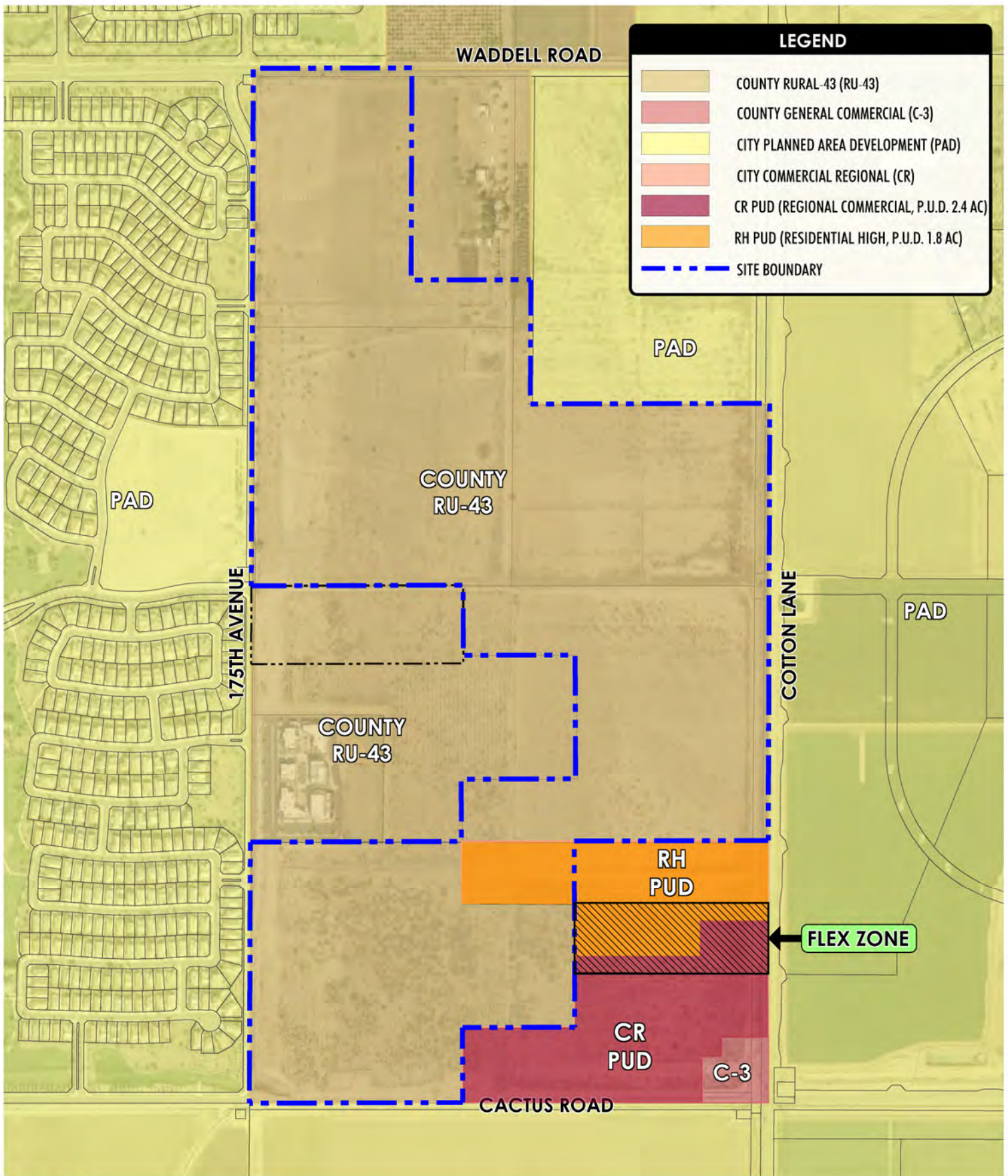
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9/1/16

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U:\1640-CACTUS & 175TH\CAD\PLANNING\LVA-1640-FIGURE 9-EXISTING GENERAL PLAN LAND USE MAP.dwg Sep 1, 2016



CITIZEN PARTICIPATION FINAL REPORT

MAGNOLIA & SWEETWATER PLANNED UNIT DEVELOPMENT

PARCEL NUMBERS: 502-04-002P, 502-04-002J, 502-04-004, 502-04-006B, 502-04-006A,
502-04-005D, 502-04-022D, 502-04-002Q, 502-04-002E, 502-04-023C, 502-04-022A,
and 502-04-002R

CITY OF SURPRISE

PREPARED BY:

LVA URBAN DESIGN STUDIO, LLC
120 E. Ash Ave.
Tempe, AZ 85281

November 2016

ANNEXATION, PUD ZONING & PRELIMINARY PLAT
(FS16-427, FS16-391 & FS16-392)

Development Team

Developer

Surprise Village Partners, LLC
c/o AZ Community Development, LLC
Mr. Joseph Kalish and Jack Hilton
11024 N. 28th Dr. Suite 170
Phoenix, AZ 85029
(602) 499-0899

Land Planner

LVA Urban Design Studio, LLC
Mr. Mark Reddie
120 South Ash Avenue
Tempe, Arizona 85281
(480) 994-0994

Civil Engineer

David Evans & Associates
Mr. Don Willie
4600 E. Washington St. Suite 250
Phoenix, AZ 85034
(602) 678-5151

Traffic Engineer

CivTech
Ms. Dawn Cartier
10605 N. Hayden Rd. Suite 140
Scottsdale, AZ 85260
(480) 659-4250

CITIZEN PARTICIPATION FINAL REPORT

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Appendices

- Appendix A: Site Posting Affidavits
- Appendix B: Neighborhood Meeting Notification Letter
- Appendix C: Daily Sun Newspaper Advertisement
- Appendix D: Meeting Exhibits
- Appendix E: Sign in Sheets & Comment Cards
- Appendix F: Scanned E-mail Comments and Responses

I. PUBLIC MEETING INFORMATION

A. Applicant Attendees:

AZ Community Development – Joseph Kalish, Jack Hilton - Owners Representatives

David Evans & Associates – Don Willie – Civil Engineer Representative

CivTech – Dawn Cartier – Traffic Engineer

LVA Urban Design Studio – Mark Reddie, Alisse Highley - Applicant/Planning Consultant

II. PROJECT DESCRIPTION

The proposed applications are requesting a zone change on 178 acres of property currently zoned R1-43 to approximately 78.6 acres of RM-6 PUD, approximately 95.2 acres of RM-9 PUD, approximately 1.8 acres of RH-PUD and approximately 2.4 acres of /CR-PUD. Note that approximately 2.3 acres within the RH-PUD and CR-PUD is in a flex zone which allows the flexibility for either zoning district based on the final site plan configuration. This request includes a PUD Overlay on the entire 178 acres located at the northeast corner of Cactus Road and 175th Avenue. Concurrent with this request, the applicant will be submitting an Annexation application and a Preliminary Plat for the property as well. Note that a companion zoning application and preliminary plat is also being processed for an additional 10-acre property at the southeast corner of 175th Avenue and Sweetwater Avenue. Upon annexation and rezoning, the intent is to include this parcel within the overall Magnolia master planned community. The public outreach activities were conducted for both projects together.

As part of the Annexation and Zoning process, a neighborhood meeting was held on October 19, 2016 as an opportunity for local residents to learn about the project, ask questions, and express their comments or concerns regarding the project.

III. MEETING LOCATION

The neighborhood meeting was held at Sunset Hills Elementary located at 17825 W. Sierra Montana Loop Surprise, Arizona on Wednesday October 19, 2016 from 6:00pm to 7:00pm.

IV. NOTIFICATION

A. REQUIRED SITE POSTING

On October 4, 2016 sixteen notification signs were posted on the subject site informing the surrounding community of the proposed applications and of the neighborhood meeting. These signs will remain in place and continue to be updated as the application advances through to City Council. **Appendix A, *Site Posting Affidavits*** includes photos of the signs, locations, and affidavits.

B. REQUIRED FIRST CLASS MAILINGS

Mailed notification letters were sent from the City of Surprise to 135 property owners and HOAs on October 6, 2016. The letters included a map of the project and details on the neighborhood meeting. A copy of the outreach letter can be found in **Appendix B, *Neighborhood Meeting Notification Letter***.

C. REQUIRED NEWSPAPER ADVERTISEMENT

An advertisement was posted in in the Daily News-Sun on September 30, 2016 with a map and details of the Citizen Review Meeting. A copy of the advertisement can be found in **Appendix C, *Daily Sun Newspaper Advertisement***.

V. PUBLIC MEETING

The applicant team arrived at Sunset Hills Elementary school to set up exhibit boards and sign in/comment card tables. Directional signs were posted in the parking lot and outdoor hallways to direct and notify residents to the meeting room. See **Appendix D, Meeting Exhibits** for a copy of all exhibits presented at the Neighborhood Meeting.

Twenty eight attendees were recorded on the sign-in sheet (See **Appendix E, Sign-In Sheet and Comment Cards**) for the open house style neighborhood meeting. Guests were greeted at the door and encouraged to walk through the exhibits with a member of the development team. Comment cards were provided throughout the meeting. The meeting came to a close at 7:15 pm.

Since the neighborhood meeting, the applicant has followed up and emailed a site plan to the six attendees who left requests via comment card. No responses have been received at this time, but the applicant will continue to accept feedback through the application process. All sent and received e-mails to date have been included with this report as **Appendix F, Scanned E-mail Comments & Responses**.

VI. MEETING PARTICIPANT FEEDBACK

Included as **Appendix E, Sign-In Sheet & Comment Cards** is a copy of all comment cards received from the October 19th meeting. Below is a response tally, brief summary of feedback, and written responses to questions and/or negative feedback in Subsection A below. Outreach response was the result of neighborhood meeting comment cards. Similar comments are grouped together.

RESPONSE TALLY

Positive Feedback – 1

Negative Feedback – 2

Informative/Suggestions/Neutral – 7

SUMMARY OF FEEDBACK

- Encouraging relocation of proposed access on to 175th Ave
- Concern about multi-family being part of the development
- Request for site plan
- Request for continual updates
- In favor of building Sweetwater
- Concern about traffic impacts

A. GENERAL COMMENTS/CONCERNS & RESPONSES

- Eliminating 175th Ave. Access
Applicant Response – A Traffic Impact Analysis was completed as part of the application. Based on the project densities, improvements and proposed mitigation, 175th Avenue is shown to operate at an acceptable level of service.
- Concern about multi-family being included in the development
Applicant Response – Multi-family is not proposed within this development. All residential is single-family detached. This addresses resident concerns regarding this issue.

- Request for Site Plan & Follow up
Applicant Response – Emails from the applicant were sent out October 21, 2016 to those who requested additional information. An open line of communication was offered as well as an attached site plan.
- Increased traffic
Applicant Response – A Traffic Impact Analysis was done as part of the zoning submittal process for both projects. The TIA's have been submitted, revised per comments, and reviewed by staff. The TIA identifies traffic impacts and improvements required to mitigate impacts. While the applicant acknowledged that traffic will increase with the proposed development, various roadway improvements and mitigation will be provided to accommodate the increased traffic in the area. The conclusions of the TIA's indicate that with the proposed improvements and mitigation, all roadways will operate at an acceptable level of service at full build out.

VII. PUBLIC CORRESPONDENCE SUMMARY AND PLAN REVISIONS

The applicant received a phone call in response to the email sent out on October 21, 2016. That call was in reference to clarification on the date of the upcoming public hearings, and the scheduled Annexation public hearing on November 15, 2016. No other correspondence has been received.

No major adjustments were necessary to address resident concerns with the project based on feedback received at the neighborhood meeting and through comment cards. The applicant remains open to resident comments, but believes the current plan does respond to all comments expressed by the residents.



**DEPARTMENT OF THE AIR FORCE
AIR EDUCATION AND TRAINING COMMAND**

3 October 2016

Mr. James R. Mitchell
Director, Community Initiatives Team
56th Fighter Wing
14185 West Falcon St.
Luke AFB AZ 85309-1629

Ms. Jamie Sullivan
Development Services Specialist
City of Surprise Planning Department
16000 N. Civic Center Plaza
Surprise AZ 85374

Re: FS16-392; Magnolia

Dear Ms. Sullivan

Thank you for the opportunity to provide comments on the Annexation, Rezone and Preliminary Plate Application for Magnolia. The project consist of 233 acres located at the northeast corner of Cactus Road and 175th Avenue in unincorporated Maricopa County. The intent of the applicant is to annex the subject property into the City of Surprise in order to zone and develop portions of the property as a residential master planned community. Magnolia will be an 181.1 acre residential master planned community within a growth area of the City of Surprise consisting of 900 single family homes with a 5.0 du/ac. The Rezone will be from Rural 43 (RU-43) to Residential medium, Planned Unit Development (MR-9 PUD) and RM-6 PUD. The development is located approximately 2.28 miles outside the Luke AFB 1988 JLUS 65 Ldn, "high noise or accident potential zone" as identified by A.R.S. § 28-8461 and is within the "territory in the vicinity of a military airport" also defined by A.R.S. § 28-8461. The site is also 5.8 miles outside the Luke AFB Auxiliary Field #1 2004 65 Ldn, "high noise or accident potential zone".

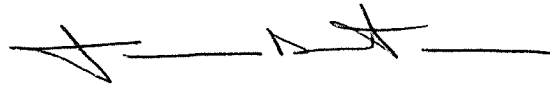
Luke AFB follows the guidelines of the Graduated Density Concept (GDC). The GDC proposes, in the absence of a more restrictive state, county or municipal general or comprehensive plan, a maximum of 2 du/acre from the 65 Ldn to 1/2 mile, a maximum of 4 du/acre from 1/2 mile to 1 mile and a maximum of 6 du/acre from 1 to 3 miles. The above density of 5.0 du/ac falls within these guidelines.

The request for annexation and construction of 900 single family homes will not negatively impact Luke AFB's flying mission. Since the site will be located within the "territory in the vicinity of a military airport," it will be subjected to approximately 165 over flights a day, with some as low as 1,500 feet above ground level. We recommend you review the sound

attenuation requirements found in A.R.S. § 28-8482. In addition, a strong notification program on the part of the applicant is essential to inform potential residents about Luke AFB operations.

If there are any questions, please contact my Community Planner, Ms. Barbara Plante, at (623) 856-9981.

Sincerely

A handwritten signature in black ink, appearing to read 'J. Mitchell', followed by a horizontal line.

JAMES R. MITCHELL

cc:

Colonel David G. Shoemaker, Vice Commander, 56th Fighter Wing

Ms. Cindy L. Calderon, GS-13, General and Environmental Law Attorney, 56th Fighter Wing

Jamie,

I have reviewed the proposed FS16-392 Magnolia residential development. The development does not affect any ADOT highway facilities.

We appreciate the opportunity to review and comment.

PETE ENO

Right Of Way Coordinator

205 South 17th Avenue Mail Drop 612E

Phoenix, AZ 85007

602-712-7348

azdot.gov



Jamie,

Thank you for providing the Electronic Submittal for Magnolia (FS16-392).

MWD has reviewed this submittal and determined that the proposed development project will impact MWD. As a result, this development will require a development agreement between MWD and the developer to address the impacts to MWD's facilities and/or property interests. Please have the developer or their consultant contact MWD to discuss this project. Additionally, the developer will need to provide copies of any subdivision plats and utility and improvement plans to MWD for review and approval pursuant to the attached *MWD Drawing Requirements*, along with payment of the applicable plan review fees pursuant to the attached *MWD Fees & Payment Schedule*. Upon our review of the plat and/or plans once they are provided by the developer, MWD will copy the City on our approval and/or comments.

Thanks again,

Debbie Trasancos

Property & Contracts Specialist

Maricopa Water District

14825 W. Grand Ave.

Surprise, AZ 85374

623/546-8266

fax 623/584-2536

debbiet@mwdaz.com

ORDINANCE 2017-03

AN ORDINANCE OF THE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA, APPROVING A REZONE FROM RESIDENTIAL RANCH (RR) TO RESIDENTIAL MEDIUM DENSITY 6 DU/AC PLANNED UNIT DEVELOPMENT (RM-6 PUD); FROM RESIDENTIAL RANCH (RR) AND RESIDENTIAL HIGH DENSITY PLANNED UNIT DEVELOPMENT (RH-PUD) TO RESIDENTIAL MEDIUM DENSITY 9 DU/AC PLANNED UNIT DEVELOPMENT (RM-9 PUD); FROM RESIDENTIAL RANCH (RR) TO RESIDENTIAL HIGH DENSITY PLANNED UNIT DEVELOPMENT (RH PUD) WITH FLEX ZONE; FROM RESIDENTIAL RANCH (RR) TO REGIONAL COMMERCIAL PLANNED UNIT DEVELOPMENT (CR PUD) WITH FLEX ZONE AND FROM RESIDENTIAL RANCH (RR) TO REGIONAL COMMERCIAL PLANNED UNIT DEVELOPMENT (CR PUD); FOR THE PROJECT KNOWN AS "MAGNOLIA", GENERALLY BOUNDED BY COTTON ROAD, 175TH AVENUE, CACTUS ROAD AND WADDELL ROAD.

WHEREAS, this Ordinance was properly noticed for public hearing and the necessary hearings and opportunity for public input were completed;

WHEREAS, the subject site is generally bounded by Cotton Road, 175th Avenue, Cactus Road and Waddell Road;

WHEREAS, portions of the subject site were annexed into the City of Surprise under Ordinance # 2017-01 and currently enjoy Residential Ranch (RR) zoning as a result of that annexation;

WHEREAS, certain portions of the subject site were not included in the aforementioned annexation and are currently zoned RH PUD;

WHEREAS, the proposed use of the subject property requires modification of the applicable zoning regulations;

WHEREAS, the proposed Rezoning satisfies the requirements set forth in Chapter 122 of the Surprise Municipal Code;

WHEREAS, this Rezone is in harmony with the purposes and intent of the zoning ordinance and the Surprise General Plan; and

WHEREAS, on January 5, 2017, the Planning and Zoning Commission recommended approval of the Magnolia development.

NOW, THEREFORE, BE IT ORDAINED by the Mayor and Council of the City of Surprise, Arizona, as follows:

Section 1. *Rezoning.* The below described parcels shall be rezoned as indicated in sections 1A, 1B, and 1C.

Section 1A. The parcel legally described on Exhibit A1 and depicted on Exhibit A2 is rezoned from Residential Ranch (RR) to Residential Medium Density, maximum six dwelling units per gross acre, planned unit development (RM-6 PUD) in a manner consistent with the Zoning Map included in Exhibit A2, subject to the stipulations contained within Section 2 herein.

Section 1B. The parcel legally described on Exhibit B1 and depicted on Exhibit B2 is rezoned from Residential Ranch (RR) and Residential High Density planned unit development (RH-PUD) to Residential Medium Density, maximum nine dwelling units per gross acre, planned unit development (RM-9 PUD) in a manner consistent with the Zoning Map included in Exhibit B2, subject to the stipulations contained within Section 2 herein.

Section 1C. The parcels legally described on Exhibit C1 and depicted on Exhibit C2 are rezoned from Residential Ranch (RR) on Parcel 1 to residential high density planned unit development with flex zone (RH PUD with Flex Zone), from Residential Ranch (RR) on Parcel 2 to regional commercial planned unit development with flex zone (CR PUD with Flex Zone), and Residential Ranch (RR) on Parcel 3 to regional commercial planned unit development (CR PUD) applied in a manner consistent with the Zoning Map included in Exhibit C2, subject to the stipulations contained within Section 2 herein.

Section 2. The following stipulations of approval shall apply:

- a. Development and use of the site shall be in substantial conformance with the project narrative entitled "Magnolia", prepared by LVA Urban Design Studio, dated revised December 2016 and stamped received December 6, 2016, except as modified by the terms of this Ordinance.
- b. Approval of this zone change request presumes the successful annexation of the subject property as being processed under FS16-427. Should said annexation request fail, the zoning of the property granted under the subject approval shall not take effect and this Ordinance shall be null and void.
- c. Non-compliance with the stipulations of approval of this case will be treated as a violation in accordance with the provisions of Article XIV of the Surprise Unified Development Code.

Section 3. *Amendment of Zoning Map.* The City of Surprise zoning map is herewith amended to reflect the change in districts referred to in Sections 1A, 1B and 1C above.

Section 4. *No Codification.* This Ordinance is not of a general nature and shall not be codified.

Section 5. *Repeal of Conflicting Ordinances.* All ordinances or parts of ordinances in conflict with the provisions of this ordinance or any part of the code adopted herein by reference are hereby repealed, upon the effective date of this Ordinance.

Section 6. *Severability.* If any section, subsection, sentence, clause, phrase or portion of this ordinance is for any reason held to be invalid or unconstitutional by the decision of any court of competent jurisdiction, such decision shall not affect the validity of the remaining portions thereof.

Section 7. *Effective Date.* This ordinance shall become effective at the time and in the manner prescribed by law.

APPROVED AND ADOPTED this _____ day of _____ 2017.

Sharon R. Wolcott, Mayor

Attest:

Approved as to form:

Sherry Aguilar, City Clerk

Robert Wingo, City Attorney

EXHIBIT "A1"

DESCRIPTION

MAGNOLIA ZONE CHANGE from RR to RM-6 PUD

A portion of the northeast quarter of Section 14, Township 3 North, Range 2 West of the Gila and Salt River Base and Meridian, City of Surprise, Maricopa County, Arizona, described as follows:

BEGINNING at the north quarter corner of said Section 14, from which the northeast corner of said Section 14 lies North 89°50'33" East 2643.35 feet;

Thence along the north line of said northeast quarter North 89°50'33" East 810.02 feet;

Thence South 00°12'48" West 1083.02 feet;

Thence North 89°50'33" East 611.78 feet;

Thence South 00°12'26" West 633.00 feet;

Thence North 89°50'33" East 1221.86 feet to the east line of said northeast quarter;

Thence along said east line South 00°12'04" West 923.54 feet to the east quarter corner of said Section 14;

Thence along the east-west midsection line of said Section 14 South 89°48'53" West 482.26 feet to the beginning of a tangent curve, concave northerly, having a radius of 1000.00 feet;

Thence departing said midsection line westerly along the arc of said curve through a central angle of 13°10'47" a distance of 230.03 feet;

Thence North 77°00'20" West 461.66 feet to the beginning of a tangent curve, concave southerly, having a radius of 700.00 feet;

Thence westerly along the arc of said curve through a central angle of 11°39'16" a distance of 142.39 feet;

Thence North 00°09'27" West 346.85 feet to the beginning of a tangent curve, concave easterly having a radius of 600.00 feet;

Thence northerly along the arc of said curve through a central angle of 01°17'08" a distance of 13.46 feet;

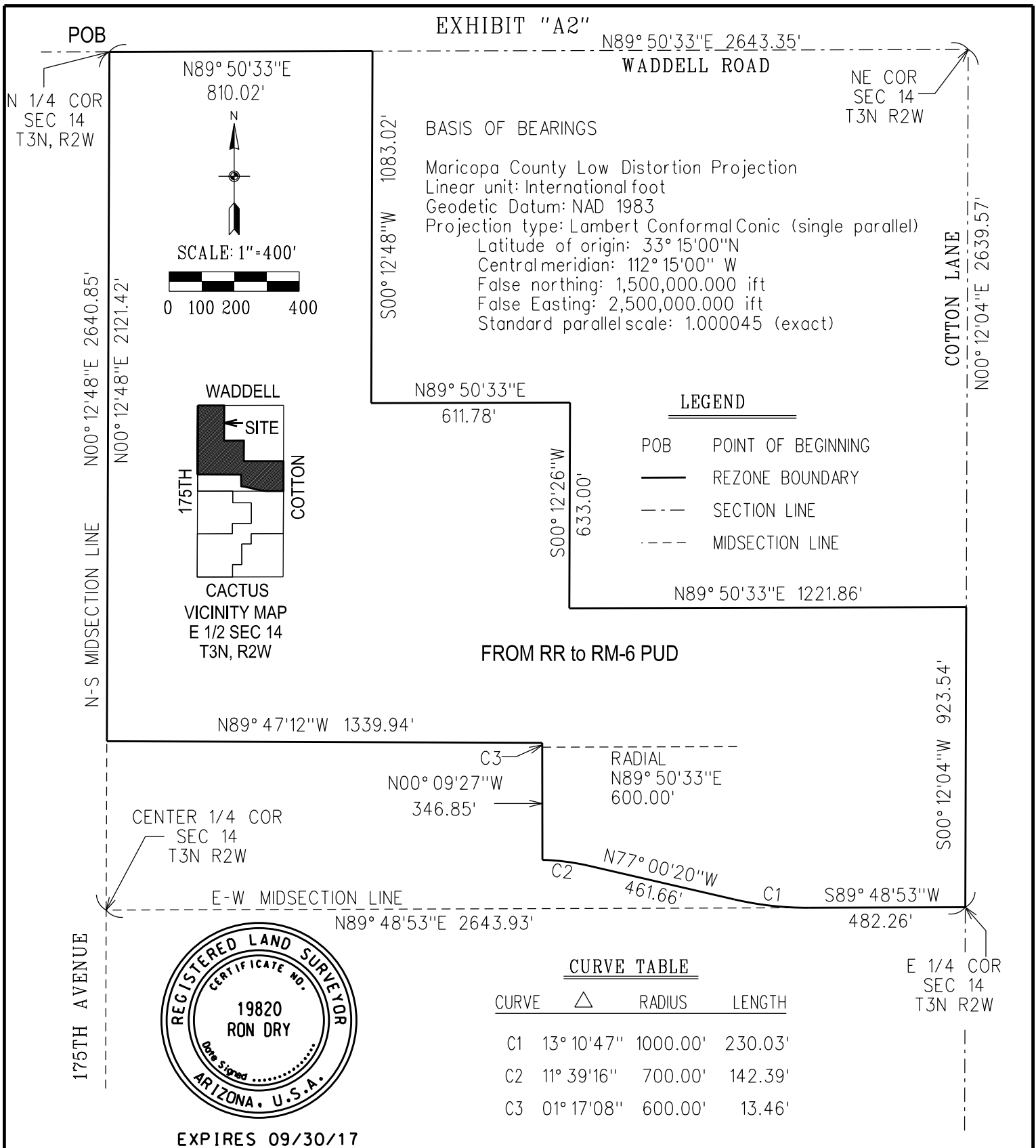
Thence North 89°47'12" West 1339.94 feet to a point on the north-south midsection line of said Section 14;

Thence North 00°12'48" East 2121.42 feet to the POINT OF BEGINNING.

Attached is EXHIBIT "A2" and by this reference is made a part hereof.

End of description

EXPIRES 09-30-2017



MAGNOLIA ZONE CHANGE
from RR to RM-6 PUD



CITY OF SURPRISE
LAND SURVEY DEPARTMENT

PROJECT # 16034

DRAWN BY RCD

DATE 01-11-17

SHEET 1 OF 1

EXHIBIT "B1"

DESCRIPTION

MAGNOLIA ZONE CHANGE from RR to RM-9 PUD and from RH PUD to RM-9 PUD

Portions of the east half of Section 14, Township 3 North, Range 2 West of the Gila and Salt River Base and Meridian, City of Surprise, Maricopa County, Arizona, described as follows:

RR to RM-9 PUD

BEGINNING at the south quarter corner of said Section 14, from which the southeast corner of said Section 14 lies North 89°48'58" East 2645.51 feet;
Thence along the north-south midsection line of said Section 14 North 00°12'46" East 1332.63 feet;
Thence departing said midsection line North 89°48'58" East 1077.57 feet to POINT "A" for purposes of this description;
Thence North 00°11'02" West 316.90 feet;
Thence North 89°48'58" East 584.03 feet;
Thence North 00°11'02" West 633.80 feet;
Thence South 89°48'58" West 570.97 feet;
Thence North 00°11'02" West 357.04 feet to a point on the east-west midsection line of said Section 14;
Thence South 89°48'53" West 1081.58 feet to the center quarter corner of said Section 14;
Thence along said north-south midsection line North 00°12'48" East 519.43 feet;
Thence departing said midsection line South 89°47'12" East 1339.94 feet to the beginning of a non-tangent curve, concave easterly, the center of which lies South 88°52'19" East 600.00 feet;
Thence southerly along the arc of said curve through a central angle of 01°17'08" 13.46 feet;
Thence South 00°09'27" East 346.85 feet to the beginning of a non-tangent curve, concave southerly, the center of which lies South 01°20'24" West 700.00 feet;
Thence easterly along the arc of said curve through a central angle of 11°39'16" a distance of 142.39 feet;
Thence South 77°00'20" East 461.66 feet to the beginning of a tangent curve, concave northerly, having a radius of 1000.00 feet;
Thence easterly along the arc of said curve through a central angle of 13°10'47" a distance of 230.03 feet to a point on the east-west midsection line of said Section 14;
Thence along said midsection line North 89°48'53" East 482.26 feet to the east quarter corner of said Section 14;
Thence along the east line of the southeast quarter of said Section 14 South 00°10'43" West 1307.81 feet;
Thence departing said east line South 89°48'58" West 908.17 feet;

DESCRIPTION continued on page 2 of 2

DESCRIPTION (continued from page 1 of 2)

Thence South 00°11'02" East 316.90 feet;
Thence South 89°48'58" West 287.98 feet;
Thence South 00°11'02" East 633.80 feet;
Thence South 89°48'58" West 285.54 feet;
Thence South 00°11'02" East 348.90 feet to a point on the south line of the southeast quarter of said Section 14;
Thence along said south line South 89°48'58" West 1089.24 feet to the POINT OF BEGINNING.

EXCEPT

BEGINNING at the aforementioned POINT "A";
Thence North 89°48'58" East 575.97 feet;
Thence South 00°11'02" East 316.90 feet;
Thence South 89°48'58" West 575.96 feet;
Thence North 00°11'02" West 316.90 feet to the POINT OF BEGINNING.

RH PUD to RM-9

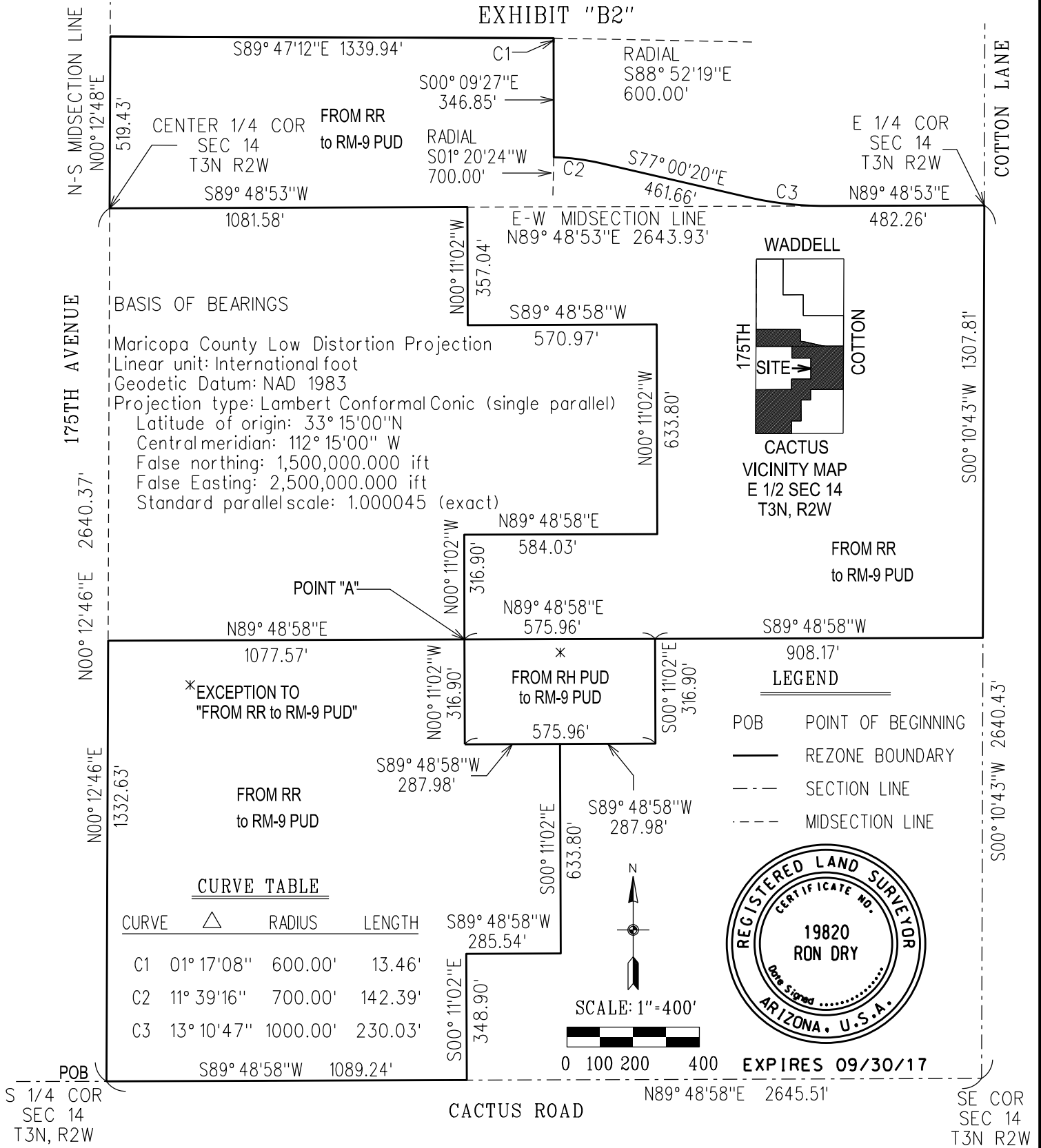
BEGINNING at the aforementioned POINT "A";
Thence North 89°48'58" East 575.97 feet;
Thence South 00°11'02" East 316.90 feet;
Thence South 89°48'58" West 575.96 feet;
Thence North 00°11'02" West 316.90 feet to the POINT OF BEGINNING.

Attached is Exhibit "B2" and by this reference is made a part hereof.

End of description

EXPIRES 09-30-2017

EXHIBIT "B2"



MAGNOLIA ZONE CHANGE
from RR to RM-9 PUD
and from RH PUD to RM-9 PUD



CITY OF SURPRISE
LAND SURVEY DEPARTMENT

EXHIBIT "C1"

DESCRIPTION

MAGNOLIA ZONE CHANGE from RR to RH PUD FLEX, CR PUD FLEX, & CR PUD

Portions of the southeast quarter of Section 14, Township 3 North, Range 2 West of the Gila and Salt River Base and Meridian, City of Surprise, Maricopa County, Arizona, described as follows:

PARCEL 1 RR to RH PUD FLEX

COMMENCING at the south quarter corner of said Section 14 from which the southeast corner of said Section 14 lies North 89°48'58" East 2645.51 feet;
Thence along the south line of said southeast quarter of said Section 14 North 89°48'58" East 1089.24 feet;
Thence departing said south line North 00°11'02" West 348.90 feet;
Thence North 89°48'58" East 285.54 feet;
Thence North 00°11'02" West 365.80 feet to the POINT OF BEGINNING;
Thence North 00°11'02" West 268.00 feet;
Thence North 89°48'58" East 287.98 feet;
Thence South 00°11'02" East 268.00 feet;
Thence South 89°48'58" West 287.98 feet to the POINT OF BEGINNING.

PARCEL 2 RR to CR PUD FLEX

COMMENCING at the south quarter corner of said Section 14 from which the southeast corner of said Section 14 lies North 89°48'58" East 2645.51 feet;
Thence along the south line of said southeast quarter of said Section 14 North 89°48'58" East 1089.24 feet;
Thence departing said south line North 00°11'02" West 348.90 feet;
Thence North 89°48'58" East 285.54 feet;;
Thence North 00°11'02" West 277.00 feet to the POINT OF BEGINNING;
Thence North 00°11'02" West 88.80 feet;
Thence North 89°48'58" East 287.98 feet;
Thence South 00°11'02" East 88.80 feet;
Thence South 89°48'58" West 287.98 feet to the POINT OF BEGINNING.

DESCRIPTION continued on page 2 of 2

DESCRIPTION continued from page 1 of 2

PARCEL 3 RR to CR PUD

COMMENCING at the south quarter corner of said Section 14 from which the southeast corner of said Section 14 lies North 89°48'58" East 2645.51 feet;
Thence along the south line of said southeast quarter of said Section 14 North 89°48'58" East 1089.24 feet;
Thence departing said south line North 00°11'02" West 348.90 feet;
Thence North 89°48'58" East 285.54 feet to the POINT OF BEGINNING;
Thence North 00°11'02" West 277.00 feet;
Thence North 89°48'58" East 287.98 feet;
Thence South 00°11'02" East 277.00 feet;
Thence South 89°48'58" West 287.98 feet to the POINT OF BEGINNING.

Attached is Exhibit "C2" and by this reference is made a part hereof.

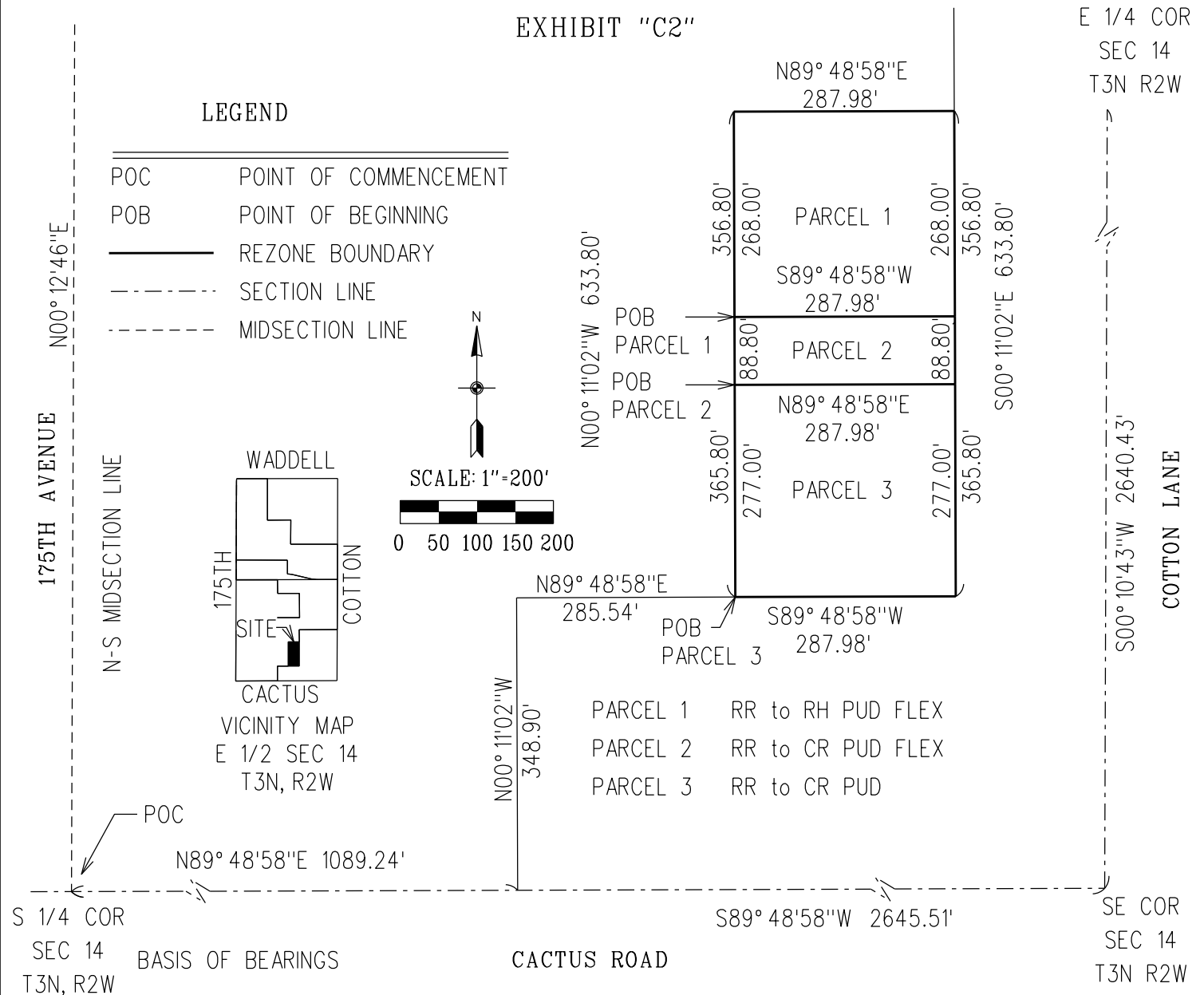
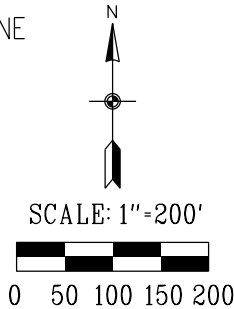
End of description

EXPIRES 09-30-2017

E 1/4 COR
SEC 14
T3N R2W

POC	POINT OF COMMENCEMENT
POB	POINT OF BEGINNING
	REZONE BOUNDARY
	SECTION LINE
	MIDSECTION LINE

 N



Maricopa County Low Distortion Projection
Linear unit: International foot
Geodetic Datum: NAD 1983
Projection type: Lambert Conformal Conic (single parallel)
Latitude of origin: 33° 15'00"N
Central meridian: 112° 15'00" W
False northing: 1,500,000.000 ift
False Easting: 2,500,000.000 ift
Standard parallel scale: 1.000045 (exact)



EXPIRES 09/30/17

MAGNOLIA ZONE CHANGE
FROM RR TO RH PUD FLEX,
CR PUD FLEX & CR PUD



CITY OF SURPRISE
LAND SURVEY DEPARTMENT

PROJECT # 16034

DRAWN BY RCD

DATE 01-11-17

SHEET 1 OF 1

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: Magnolia Rezone

OVERALL PUBLIC INVOLVEMENT LEVEL:

This activity will follow the citizen outreach and public hearing notification processes as outlined in state statute and the SUDC.

IDENTIFY STAKEHOLDERS:

Impacted residents; schools; churches; businesses; public at-large; property owners?

OBJECTIVES:

What is the purpose of the project/service/program and why is it needed? What are the impacts if the project/service/program is not achieved?

PUBLIC ENGAGEMENT STRATEGIES & TOOLS:

Public Engagement & Project timeline:

Public outreach time frame (when to when)

Future Council Work Session/Meetings target dates

Election dates (if applicable)

Project start/completion dates

Communication Tools and Technique options: (which do you plan to use?)

- ☐ Press releases
- ☐ Public meetings (video/photos, poster boards, fact sheet(s) *do you need Spanish version?)
- ☐ Presentations to boards and commissions, other interested community partners/stakeholders
- ☐ Third-party consultant/moderator (pending budget)
- ☐ Survey (online/paper/both?)
- ☐ Social media
- ☐ Surprise 11
- ☐ Notify Me email/ Council newsletters (opt-in audience)
- ☐ Paid advertising (pending budget)
- ☐ Surprise Progress (mailed quarterly and tied to print deadlines)
- ☐ Booth at city events
- ☐ Paid mailings (pending budget)
- ☐ Creation of a subcommittee/task force
- ☐ Youth/adult activities, registration, or orientation (HOA Academy)
- ☐ Website updates



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date:	January 17, 2017	Contact Person:	ROBERT KUHFUSS - COMMUNITY DEVELOPMENT
Submitting Department:	CD	District:	3
Staff Recommendations:	Approve		

Consent	Regular	Public Hearing	x	Report/Discussion
---------	---------	----------------	---	-------------------

Agenda Wording:

Consideration and action pertaining to rezoning approximately 9.9 acres of property generally located at the southeast corner of 175th Avenue and Sweetwater Road from Residential Ranch (RR) to Residential Medium Density 9 DU/Acre Planned Unit Development (RM-9 PUD); Ordinance # 2017-02.

Motion:

Motion to approve Ordinance 2017-02 zone change from RR to RM-9 PUD, subject to stipulations “a” through “c” as listed in the staff report.

Background:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of a rezone from Residential Ranch (RR) to RM-9 with a PUD Overlay to allow deviations from the base development standards. The subject request involves the rezoning of approximately 10 acres of raw land that is currently located within a County island roughly bounded by Cotton Lane, 175th Avenue, Waddell Road and Cactus Road. This request follows a related annexation case being processed under case FS16-427 and is associated with a Preliminary Plat (FS16-391) along with a companion Zone Change and Preliminary Plat being processed under FS16-392. Note: the subject request was continued at the December 15, 2016 Planning and Zoning Commission hearing to a date-certain of January 5, 2017. The results of that hearing are not known as of the writing of this report.

Objective Analysis:

The subject zone change request contemplates a change from RR to RM-9 PUD. Unlike typical “PAD” zoning, the subject request falls under the current SUDC. As such, the uses associated with each of the proposed zoning districts are per Section 122-43 of the SUDC. The proposed PUD Overlay, however, will allow certain deviations from the development standards as specified in the SUDC. The 175th & Sweetwater project is very well designed and is consistent with the General Plan and SUDC. The proposed development standards requested under the PUD Overlay will allow the applicant to develop the site in a creative manner in keeping with the intent of the SUDC. Amenities included will provide recreational opportunities for the neighborhood residents. The proposed zone change is consistent with the Surprise General Plan 2035 and the proposed development standards will allow the property to be

reasonably developed in a manner consistent with the listed companion cases.

Policy Compliant:

The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various Neighborhood types included within the character area. The subject proposal contemplates up to 55 dwelling units, which equates to approximately 5.5 DU/Ac. As such the proposed zoning most closely aligns with the Suburban Neighborhood type and is consistent with the General Plan.

Financial Impact:

All activity related to ongoing development of the City of Surprise has an economic and fiscal impact on the city and the region.

Budget Impact:

There is no anticipated budget impact related to this item.

FTE Impact:

This item does not have an impact on current staff levels.

ATTACHMENTS:

Click to download

- ☐ [00 - FS16-391 - 175 AVE & Sweetwater Ave - Zone Change - RFLS#5459 - Staff Report](#)
 - ☐ [01 - FS16-391 - 175 AVE & Sweetwater Ave - Zone Change - RFLS#5459 - Vicinity Map](#)
 - ☐ [02 - FS16-391 - 175 AVE & Sweetwater Ave - Zone Change - RFLS#5459 - Case Map](#)
 - ☐ [03 - FS16-391 - 175 AVE & Sweetwater Ave - Rezone/Zoning Amendment - Zoning Narrative - December 2016 Version](#)
 - ☐ [04 - FS16-391 - 175 AVE & Sweetwater Ave - Rezone/Zoning Amendment - Public Participation Report Excerpt](#)
 - ☐ [05 - FS16-391 - 175 AVE & Sweetwater Ave - Rezone/Zoning Amendment - Luke AFB Comments](#)
 - ☐ [06 - FS16-391 - 175 AVE & Sweetwater Ave - Rezone/Zoning Amendment - ADOT Comments](#)
 - ☐ [07 - FS16-391 - 175 AVE & Sweetwater Ave - Rezone/Zoning Amendment - MWD Comments](#)
 - ☐ [08 - Ordinance 2017-02](#)
 - ☐ [09 - FS16-391 - 175 AVE & Sweetwater Ave - Rezone/Zoning Amendment - Public Engagement Form](#)
 - ☐ [10 - FS16-391 - 175 AVE & Sweetwater Ave - Zone Change - RFLS#5459 - Presentation](#)
-

ZONE CHANGE

REPORT TO THE CITY COUNCIL

Case: FS16-391

Project Name: 175th & Sweetwater Rezone

Council District: 3

Meeting Date: January 17, 2017

Planner: Robert H. Kuhfuss, AICP

Owner: A & B Investments, Inc.

Applicant: Mark Reddie of LVA Urban Design Studio on behalf of AZ Community Development, LLC

Request: Zone change from RR to RM-9 PUD

Site Location: Generally between Cotton Lane and 175th Avenue, Waddell Road to Cactus Road

Site Size: 9.9 acres (approx.)

Density: 5.5 DU/Ac

General Plan Conformance: The proposal is consistent with the Surprise General Plan 2035

Support/Opposition: None known

Staff Recommendation: **Approve**, subject to stipulations 'a' through 'c'

Commission Recommendation: Unknown as of the writing of this report

Introduction:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of five (5) separate requests relating to the proposed development in what is currently a county island located in the western portion of Surprise, near Sarah Ann Ranch. These five requests are listed below, with the subject request highlighted in **bold font**; however, this report should be read in the context of the other four requests.

Case FS16-391 – 175th & Sweetwater

- **Zone Change from RR to RM-9 PUD**
- Preliminary Plat

Case FS16-392 – Magnolia

- Rezone from RR to RM-6 PUD; from RR to RM-9 PUD; from RH PUD to RM-9 PUD; from RR to RH PUD with Flex Zone; from RR to CR PUD with Flex Zone and from RR to CR PUD.
- Preliminary Plat

Case FS16-427 – Annexation*, **

Four of the five aforementioned requests will first be presented to the Planning and Zoning Commission, who will make a recommendation to the City Council. The first of the five requests involves the actual annexation of the property and will only be heard by the City Council. It is envisioned that all five requests will be presented to the City Council on January 17, 2017.

The following map depicts the county island status as currently existing and post-annexation.



* The annexation request was initially tied to FS16-391 and FS16-392; however, due to the differing land masses involved, the annexation was broken out from the other two cases and assigned its own case number.

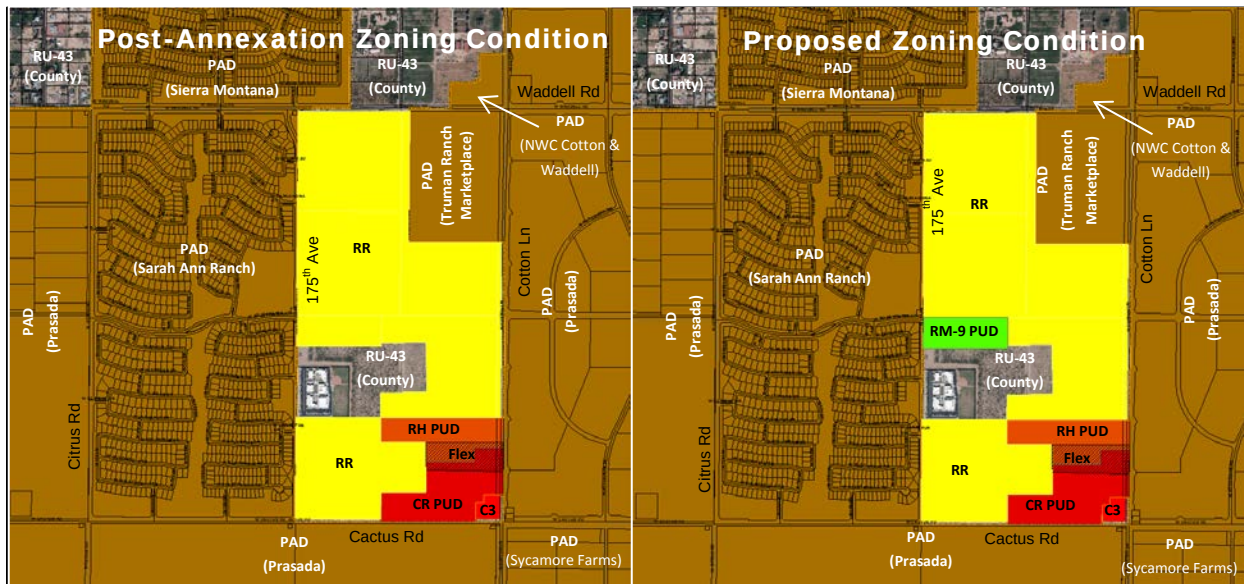
** The blank petition relating to the proposed annexation was reviewed and heard by the City Council during a public hearing conducted on November 15, 2016 and is tentatively scheduled for final action by the City Council on January 17, 2017 together with the other related requests. Information regarding the proposed annexation is discussed under separate cover.

Project Description:

The subject request involves the rezoning of approximately 10 acres of currently unincorporated land from Residential Ranch (RR) to RM-9 with a PUD Overlay to allow deviations from the base development standards. The rezone follows a related annexation case being processed under FS16-427 and precedes a related Preliminary Plat being processed under FS16-391.

Surrounding Land Zoning:

The aforementioned annexation covers essentially all of the unincorporated land located within the affected county island with the exception of any land located north of Waddell Road as well as the Paradise Honors school campus; however, the subject zone change request only covers a portion of the annexation area. The following two maps depict the post-annexation zoning condition and the proposed zoning included in the subject request.



Background:

July 28, 2016: Staff met with the applicant to discuss the project during a regularly scheduled Concept Review meeting under CR16-305.

August 8, 2016: Staff met with the applicant to discuss annexation logistics.

August 23, 2016: Staff met with the applicant to discuss product design.

September 12, 2016: The applicant filed a request for a Zone Change and Preliminary Plat under case FS16-391. The applicant filed a second request for a companion Zone Change and Preliminary Plat under case FS16-392. The latter also included an annexation request.

September 28, 2016: On behalf of the applicant, staff opened case FS16-427 relating to the annexation of the subject property.

October 19, 2015: The applicant held a neighborhood outreach meeting to discuss the project.

October 31, 2016: Staff met with the applicant to discuss review comments.

November 8, 2016: The applicant filed their second submittal for the subject case.

November 15, 2016: The City Council approved the blank annexation petition relating to the annexation of the subject property as well as other proximal properties under case FS16-427.

December 1, 2016: Staff met with the applicant to discuss the Final Plat relating to the project during a regularly scheduled Concept Review meeting under CR16-511.

December 15, 2016: The Commission continued the case to a date-certain of January 5, 2017 due to an advertising error.

January 5, 2017: The Zone Change and Preliminary Plat requests being processed under FS16-391 and FS16-392 are scheduled for review by the Planning and Zoning Commission; however, the Commission's recommendation is unknown as of the writing of this report.

Citizen Outreach:

The site was posted in accordance with the SUDC and state statute. The City of Surprise also sent notices via First Class mail in accordance with the SUDC and state statute. The applicant held a citizen outreach meeting on October 19, 2016, which was well attended. While staff has received no items of opposition or support for the project, the applicant's Citizen Participation Final Report indicates one (1) member of the public offered positive feedback and two (2) members of the public offered negative feedback. The summary report also indicated that seven (7) people offered neutral comments and suggestions. The body of the summary report is included as an attachment to this report.

Analysis and Discussion:

The subject zone change request contemplates a change from RR to RM-9 PUD. Unlike typical "PAD" zoning, the subject request falls under the current SUDC. As such, the uses associated with each of the proposed zoning districts are per Section 122-43 of the SUDC. The proposed PUD Overlay, however, will allow certain deviations from the development standards as specified in the SUDC. The following table as taken from the zoning narrative expresses the proposed residential development standards applicable to the site. Those items expressed in red font deviate from the base standard. Also of note are several footnotes which serve to clarify how certain development standards are to be applied.

Table 1: RM-9 PUD Development Standards		
Development Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35
Footnotes:		
(1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a PUE, in which case the minimum front setback shall be 10').		
(2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.		
(3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.		

Another feature of the zoning and tied to the PUD Overlay is the wall configuration. Figure 5 of the zoning narrative depict wall heights that exceed the limitations as specified in the SUDC, but is intended to be consistent with the wall design proposed under the Magnolia Rezone (FS16-392). Staff believes these features add to the amenity value of the community and exceed the requirements of the SUDC.

Figure 3 of the narrative depicts the anticipated lotting for the project. This lotting configuration is expressed in the related Preliminary Plat which is discussed under separate cover; however, staff notes that Figure 3 is intended to be a conceptual design and could change as long as such changes are implemented through the platting process.

Utility and Services Table:

Electric:	Arizona Public Service
Water:	EPCOR
Wastewater:	City of Surprise
Refuse:	City of Surprise
Natural Gas:	Southwest Gas
Irrigation:	Maricopa Water District
Schools:	Dysart USD

164 **Conformance with Adopted Plans:**

165
166 **Surprise General Plan 2035:** The Surprise General Plan 2035 shows the subject property as lying
167 within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac
168 or more, provided appropriate transitions are made between the various Neighborhood types
169 included within the character area. The subject proposal contemplates up to 55 dwelling units,
170 which equates to approximately 5.5 DU/Ac. As such the proposed zoning most closely aligns with
171 the Suburban Neighborhood type and is consistent with the General Plan.

172
173 **Reviewing Agencies:**

174
175 **Luke Air Force Base (LAFB):** In a letter dated October 3, 2015 (attached), LAFB indicated that the
176 subject development met the Graduated Density Concept and would not interfere with flight
177 operations. LAFB also requested a robust notification program.

178
179 **Arizona Department of Transportation (ADOT):** In an email dated September 20, 2016 (attached),
180 ADOT indicated the proposed development would not affect any ADOT highway facilities.

181
182 **Maricopa Water District (MWD):** In a memo dated October 19, 2016 (attached), MWD indicated
183 the property covered by this application is subject to certain MWD interests including existing
184 facilities and other property interests. MWD requires that prior to Final Plat approval, certain
185 comments must be addressed.

186
187 **Summary:**

188
189 The 175th & Sweetwater project is very well designed and is consistent with the General Plan and
190 SUDC. The proposed development standards requested under the PUD Overlay will allow the
191 applicant to develop the site in a creative manner in keeping with the intent of the SUDC.
192 Amenities included will provide recreational opportunities for the neighborhood residents.

193
194 **Findings:**

- 195
196
 - The proposed zone change is consistent with the Surprise General Plan 2035.
 - The proposed development standards will allow the property to be reasonably developed.

197
198
199 **Commission Recommendation:**

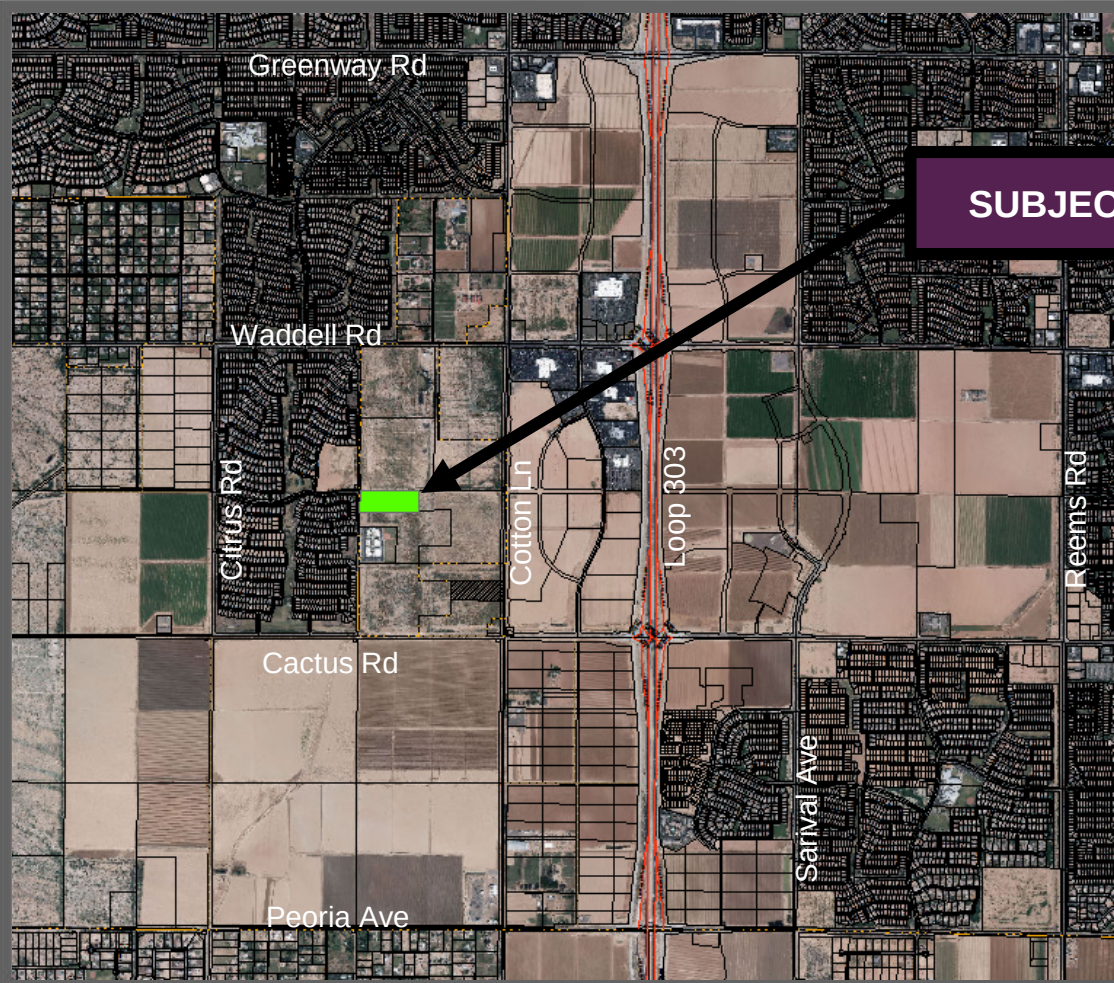
200
201 The Planning and Zoning Commission's recommendation is unknown as of the writing of this report;
202 however, based on the findings noted above, staff recommended the Commission forward a
203 recommendation of **approval** of the subject rezone request to the City Council, subject to
204 stipulations 'a' through 'c' as outlined below:
205

- 206 a. Development and use of the site shall be in substantial conformance with the project
207 narrative entitled “175th & Sweetwater”, prepared by LVA Urban Design Studio, dated
208 revised December 2016 and stamped received December 6, 2016, except as modified by
209 the following stipulations.
210
211 b. Approval of this zone change request presumes the successful annexation of the subject
212 property as being processed under FS16-427. Should said annexation request fail, the
213 zoning of the property granted under the subject approval is null and void.
214
215 c. Non-compliance with the stipulations of approval of this case will be treated as a violation in
216 accordance with the provisions of Article XIV of the Surprise Unified Development Code.
217

218 Staff will advise the City Council of the Commission’s recommendation at a later date. The Council
219 is free to accept the Commission’s findings and recommendation; however, should the City Council
220 wish to deny the request, the Council should make its own findings and base its decision on those
221 alternative findings.
222

223 **Attachments:**
224

- 225 01 Vicinity Map (1 page)
226 02 Case Map (1 page)
227 03 Project Narrative (17 pages)
228 04 Citizen Participation Final Report (excerpt, 6 pages)
229 05 Luke AFB comments (2 pages)
230 06 ADOT comments (1 page)
231 07 MWD comments (1 page)
232 08 Draft Adopting Ordinance w/ Exhibits (4 pages)



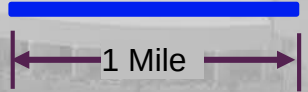
SUBJECT SITE

FS16-391
175th & Sweetwater
Rezone

Vicinity Map



North





S U R P R I S E

ARIZONA

City Council

January 17, 2017



175th & Sweetwater



FS16-427

- ✓ Annexation

FS16-391 175th & Sweetwater

- ✓ Zone Change
- ✓ Preliminary Plat

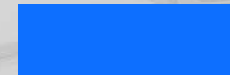
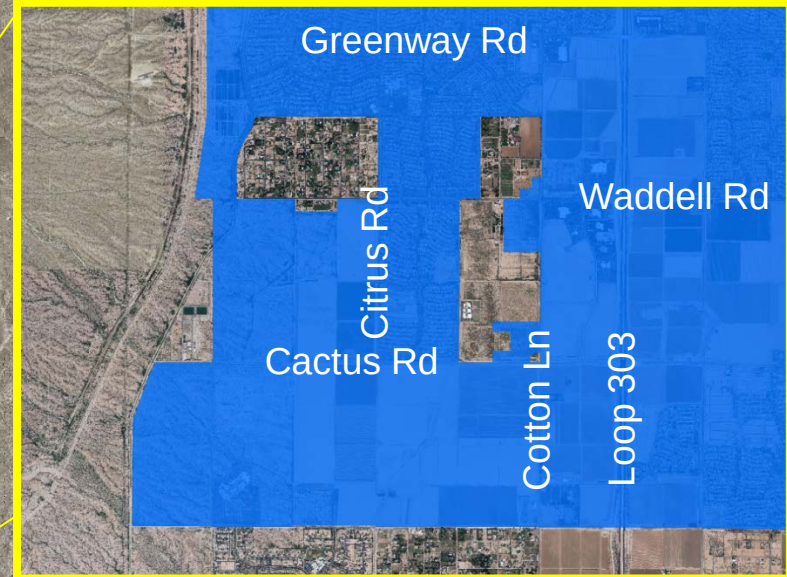
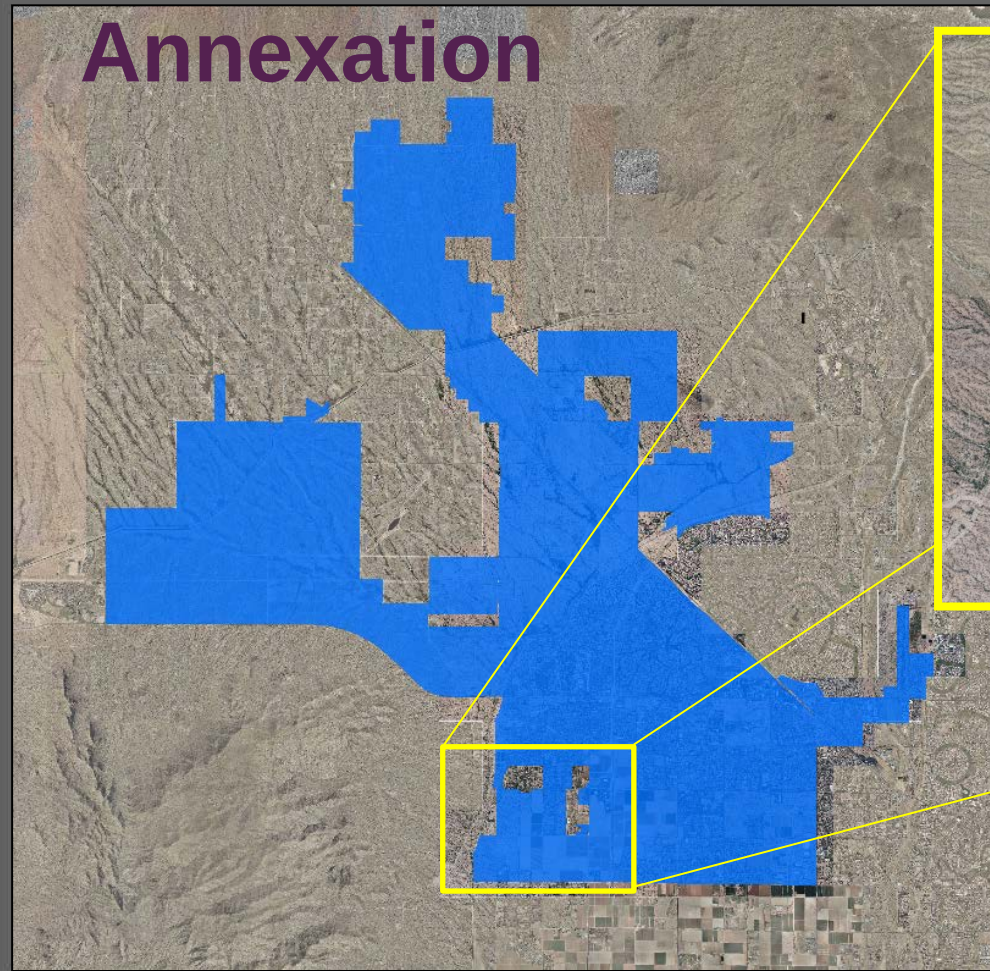
FS16-392 Magnolia

- ✓ Zone Change
- ✓ Preliminary Plat



175th & Sweetwater

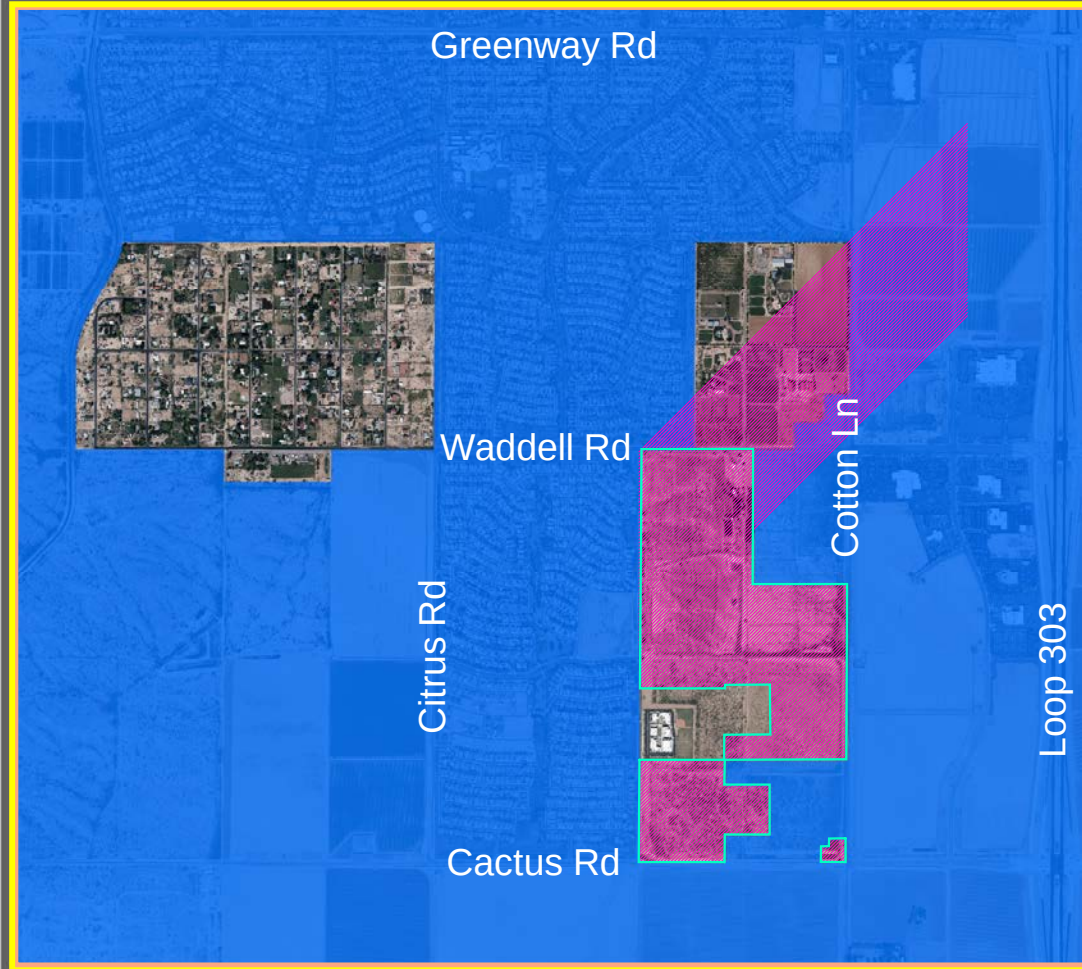
Annexation



Existing Surprise
Annexation

FS16-427

Annexation



FS16-427

Greenway Rd

Waddell Rd

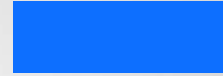
Citrus Rd

Cactus Rd

Cotton Ln

Loop 303

Annexation



Existing Surprise
Annexation

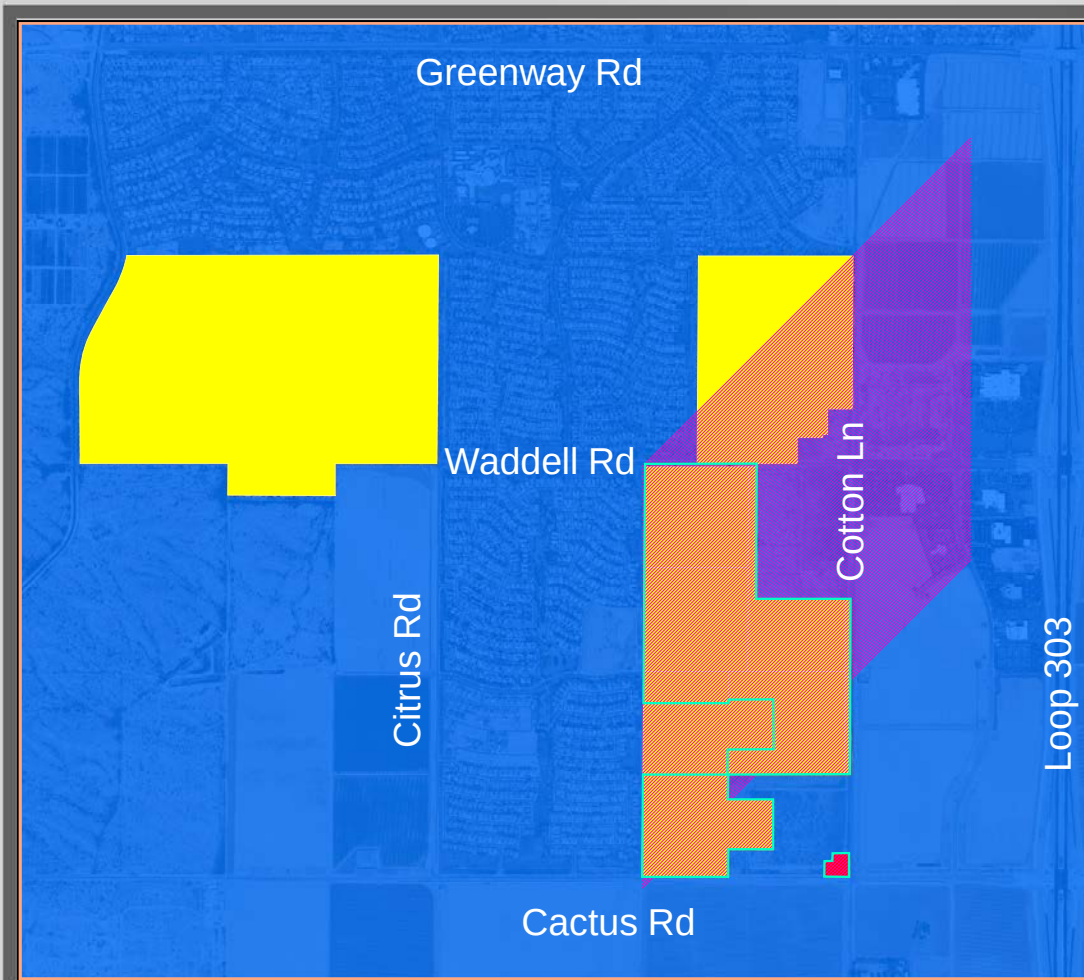


Existing County
RU-43 Zoning

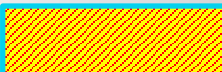
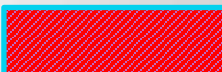


Existing County
C3 Zoning

FS16-427



Annexation

-  Existing Surprise Annexation
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning

FS16-427

Financial Impact Analysis

➤ Operating Funds

- Negative impact
- Expenses greater than revenue by \$8,851,300 over 20 years
- \$442,600 annually

➤ Enterprise Funds

- Positive Impact
- \$1,387,200 over 20 years
- \$69,400 annually

FS16-427

Alternative Actions:

- **Approve** the Annexation
- **Deny** the Annexation



Zone Changes:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia

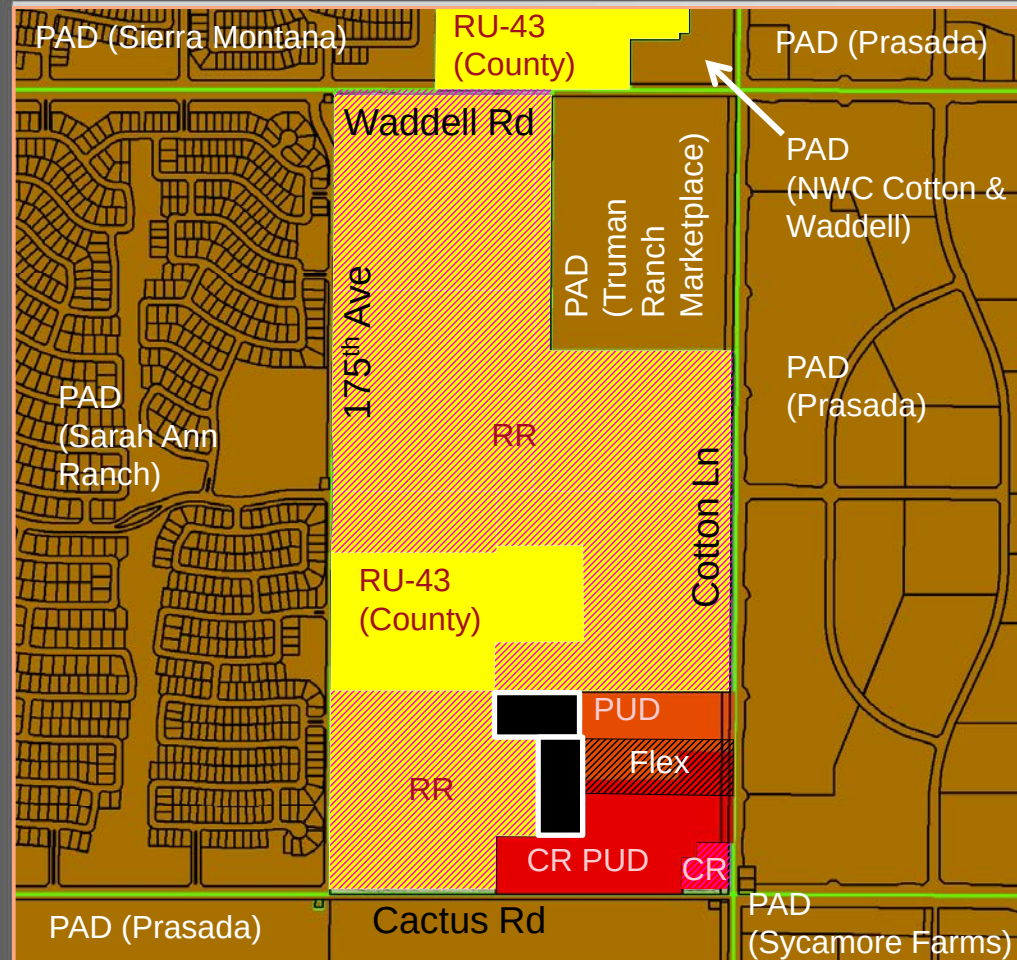


Zone Changes:

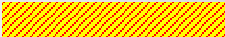
1st Zone Change Request:

➤ FS16-392 Magnolia

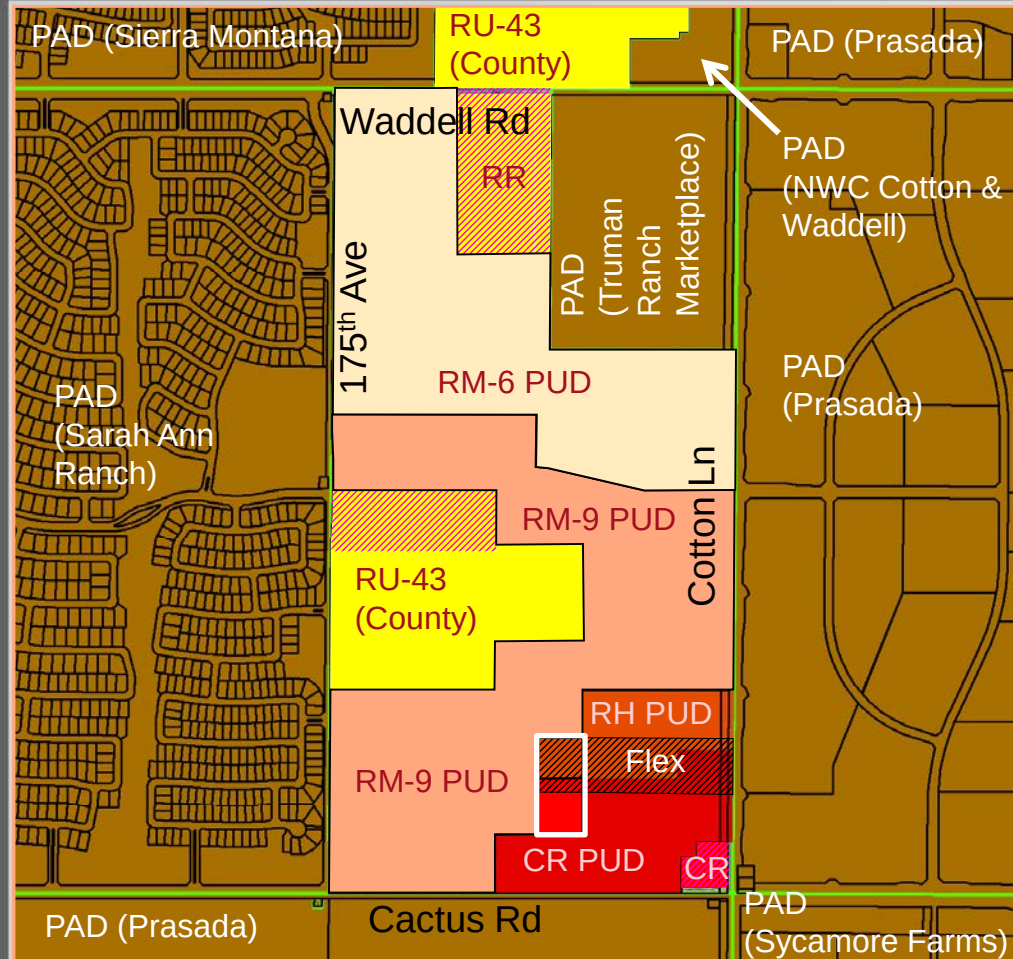




Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning*
-  Post-Annexation Surprise CR Zoning*
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning



- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning

Zone Change



FS16-392

Table 1: RM-6 FUD and RM-9 FUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 FUD Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a FUE, in which case the minimum front setback for RM-9 shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.
- (4) For RM-6 FUD, single-story minimum setback is 15', and two-story minimum setback is 20'.
- (5) For cluster product in the RM-9 FUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.





PRIMARY ENTRY MONUMENT



ENTRY FEATURE IN MEDIAN



PRIMARY ENTRY PLAN VIEW (COTTON LANE & SWEETWATER AVE)

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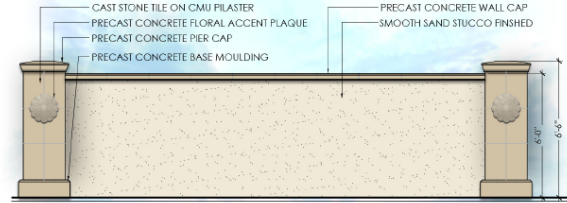
MAGNOLIA

FIGURE 6: COMMUNITY ENTRY MONUMENT

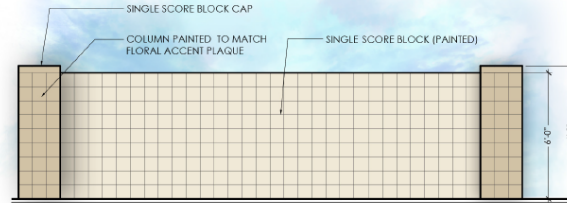
1640

DRAWN BY: PR

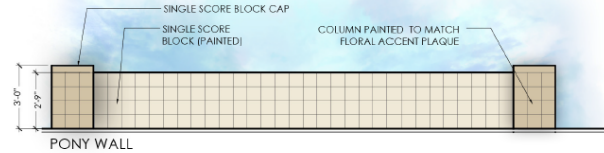
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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 6 COMMUNITY ENTRY MONUMENT.dwg Sep 7, 2016



ENHANCED THEME WALL



THEME WALL



PONY WALL

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MAGNOLIA

FIGURE 7: WALL DETAILS

APPROX. SCALES

1640

DRAWN BY: PR



11/16/16

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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



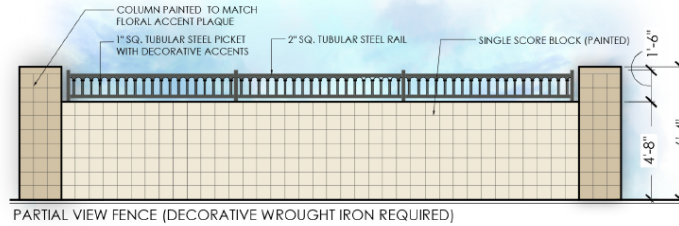
FS16-392

Monuments and Walls

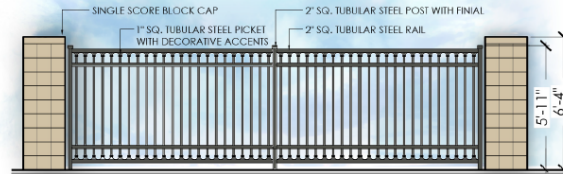


FS16-392

Monuments and Walls



PARTIAL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)



FULL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)

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MAGNOLIA

FIGURE 7A: WALL DETAILS

APPROX. SCALE(S)

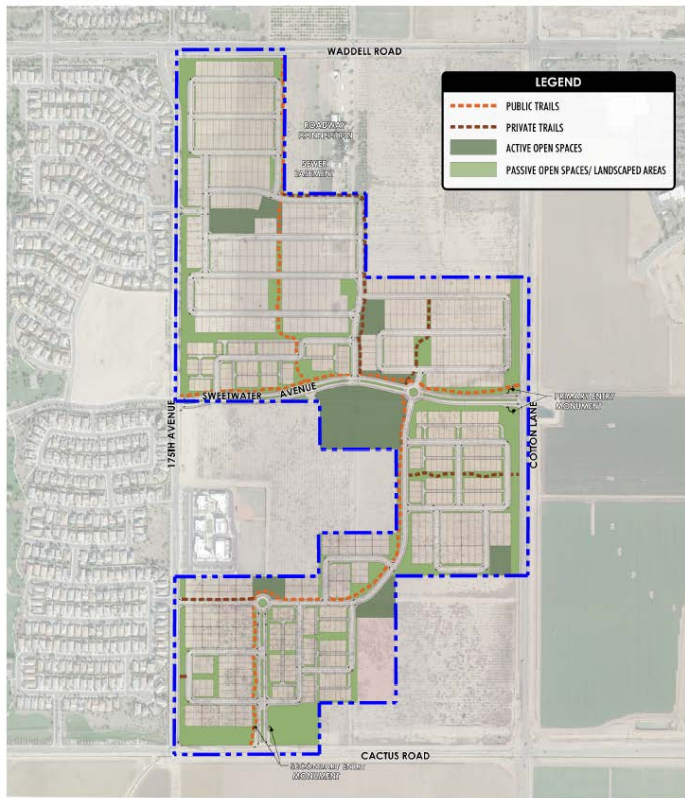
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DRAWN BY: PE



11/0/16

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 6/1/16 MAGNOLIA/CD/PLANNING/LVA-1600 FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\UVA-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016



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175TH & SWEETWATER

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

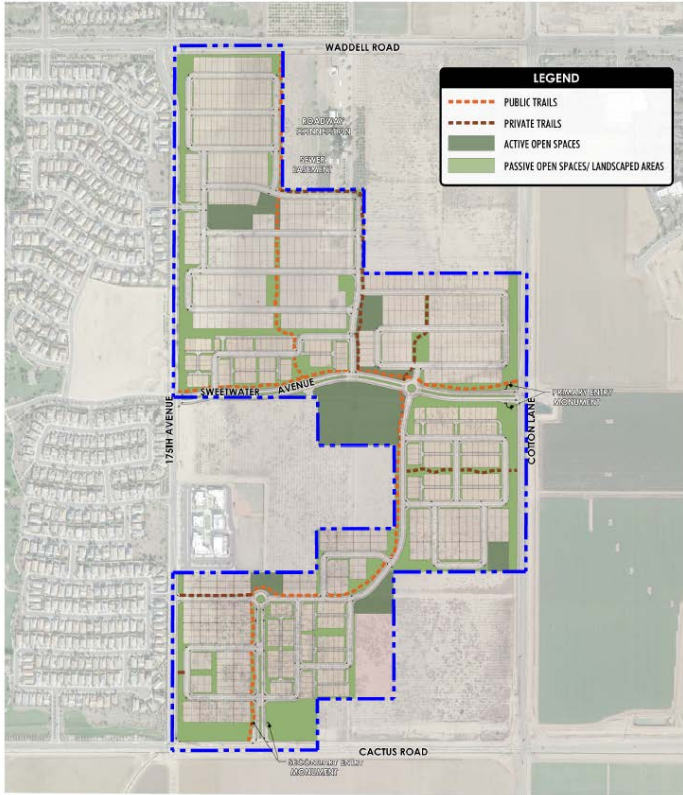
1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\UVA-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016

Amenities



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE(S)

1640 DRAWN BY: PR



11/2/14

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U:\1040-MAGNOLIA\LAND PLANNING\1040-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Rev 2, 2015



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MAGNOLIA

FIGURE 5: TRUMAN COMMUNITY CENTER SKETCH CONCEPT

APPROX. SCALE(S)

1640 DRAWN BY: PR



11/2/14

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U:\1040-MAGNOLIA\LAND PLANNING\1040-1040-FIGURE 5-TRUMAN COMMUNITY CENTER SKETCH.dwg Aug 20, 2015



FS16-392

Amenities

Commission Recommendation:

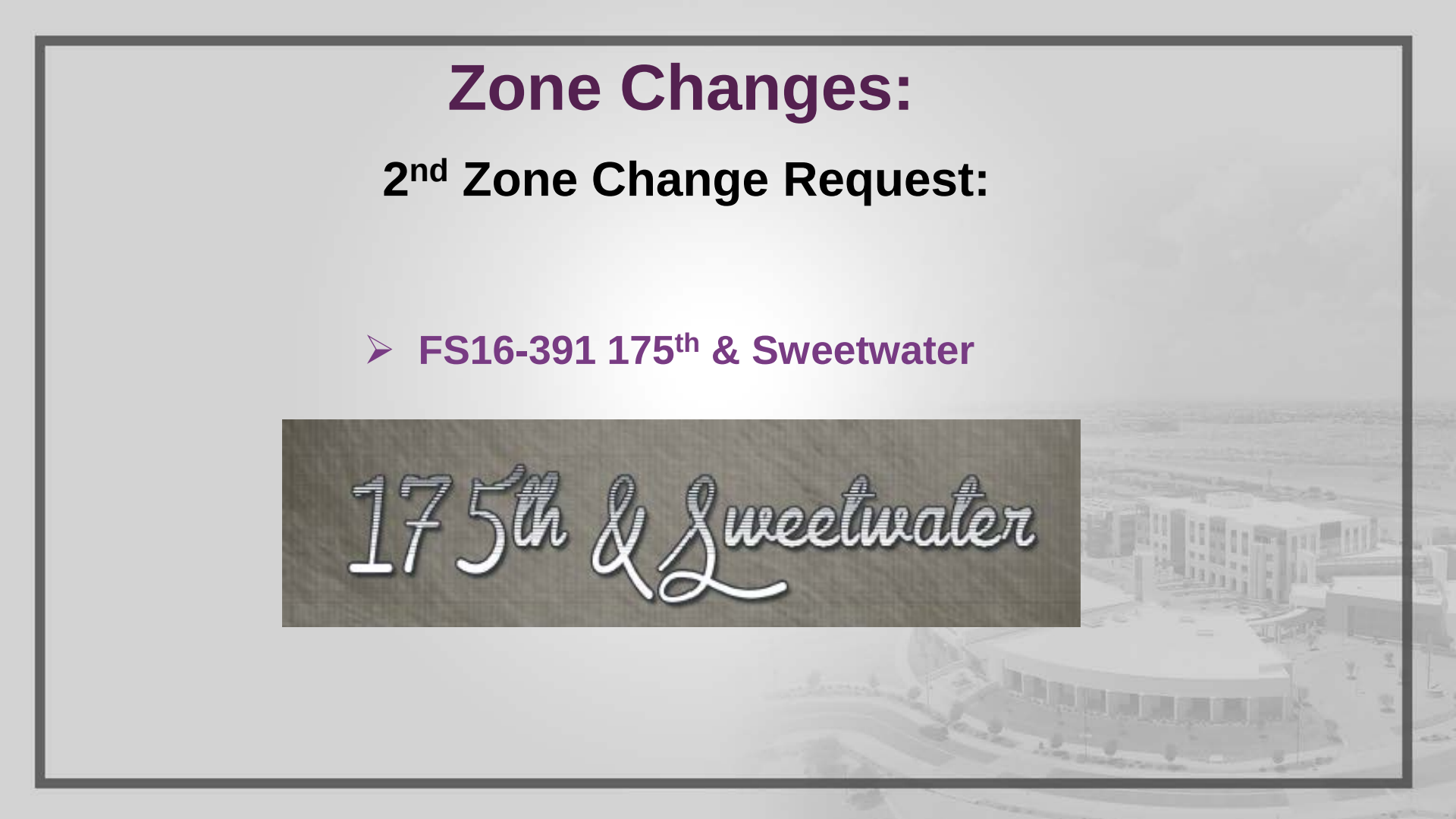


- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”

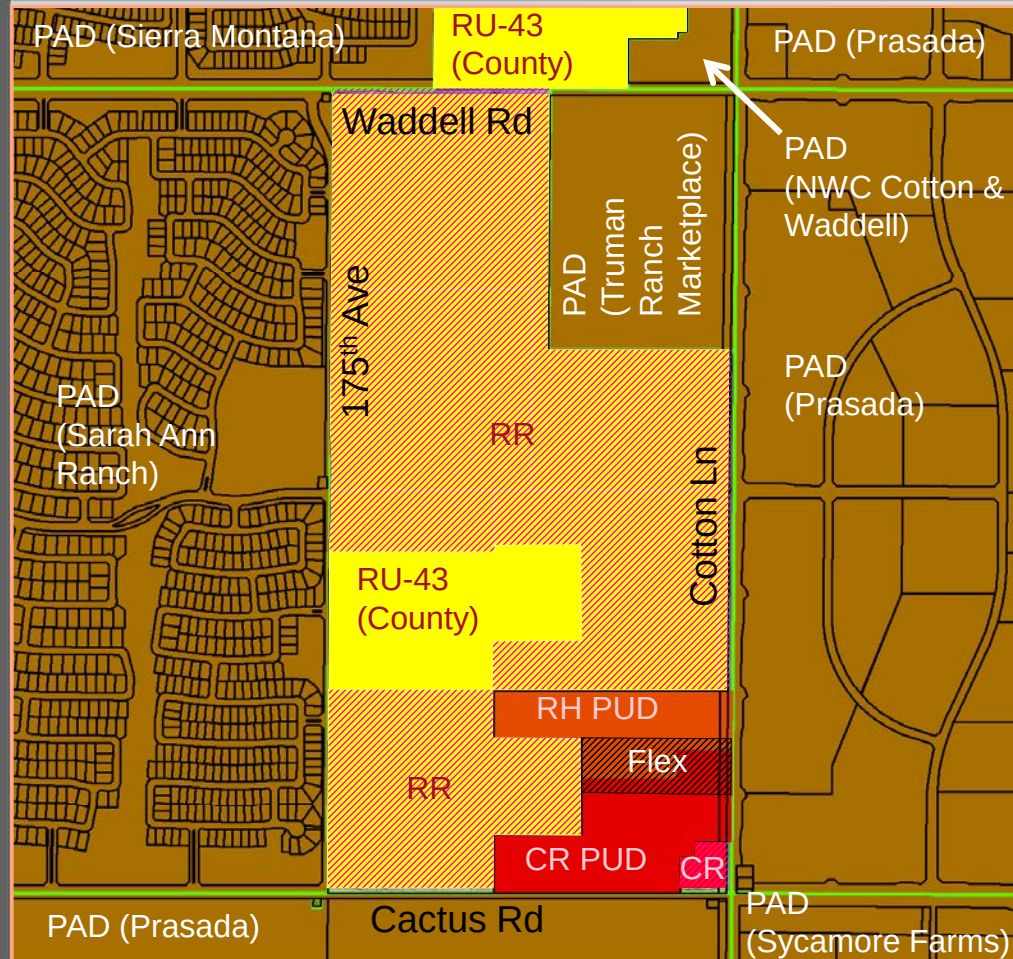
Zone Changes:

2nd Zone Change Request:

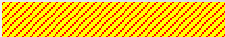
- FS16-391 175th & Sweetwater



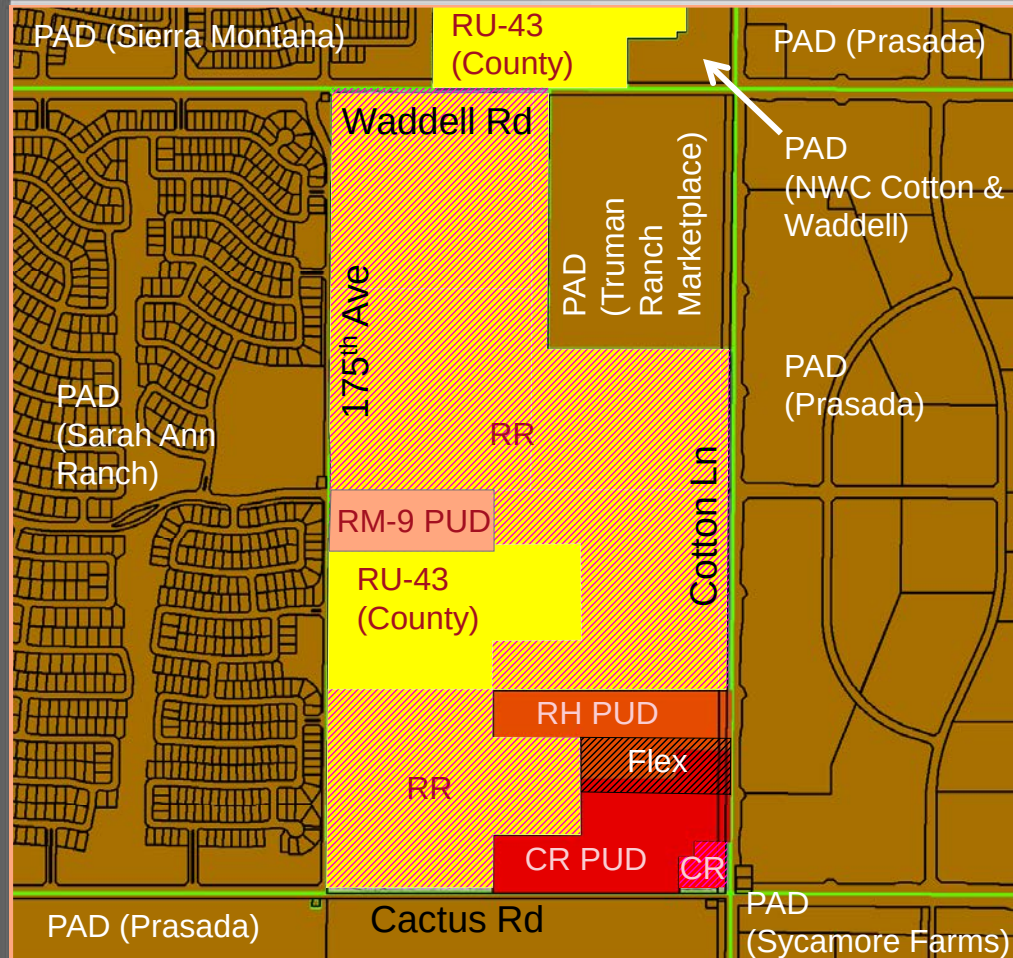
175th & Sweetwater



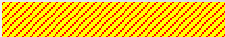
Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning*
-  Post-Annexation Surprise CR Zoning*
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

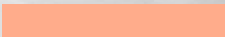
*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

175th & Sweetwater
FS16-391

-  Proposed RM-9 PUD Zoning

Zone Change

175th & Sweetwater
FS16-391



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175TH & SWEETWATER

FIGURE 3: DEVELOPMENT PLAN CONCEPT

APPROX. SCALE: 1/8" = 1' - 0"

1640 DRAWN BY: PK



11/2/14

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11/16/14 ANR0014/CAD/P/ANN0014-1405-FIGURE 3 DEVELOPMENT PLAN CONCEPT.dwg, Nov. 2, 2014

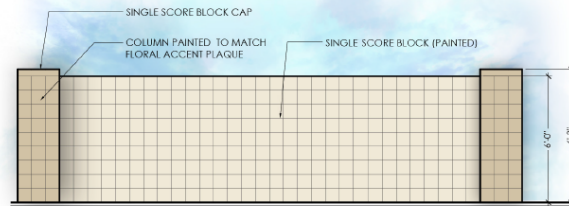
Table 1: RM-9 FUD Development Standards

Development Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35

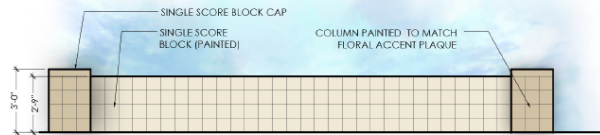
Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a FUE, in which case the minimum front setback shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.

Monuments and Walls



THEME WALL



PONY WALL

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”

Preliminary Plats:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia



Preliminary Plats:

1st Pre-Plat request:

➤ **FS16-392 Magnolia**



LEGAL DESCRIPTION

THAT PORTION OF THE NORTHEAST QUARTER AND THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2, WEST OF THE GILA AND SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA DESCRIBED AS FOLLOWS:

COMMENCING AT A BRASS CAP FOUND AT THE SOUTHWEST CORNER OF SAID SECTION 14, FROM WHICH A BRASS CAP FOUND AT THE SOUTH QUARTER CORNER OF SAID SECTION 14 BEARS SOUTH 89°48'58" WEST, 2,645.91 FEET.

THENCE ALONG THE SOUTH LINE OF SAID SOUTHWEST QUARTER, SOUTH 89°48'58" WEST, 1,566.22 FEET TO A POINT THAT LIES 1,566.24 FEET EASTERN OF THE SOUTH QUARTER CORNER OF SAID SECTION 14, THENCE NORTH 00°12'02" WEST, 33.00 FEET TO A POINT ON THE NORTH LINE OF THAT 33.00 FOOT WIDE SECTION 14, THENCE ALONG THE NORTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, MARICOPA COUNTY, ARIZONA, SAID POINT BEING THE POINT OF BEGINNING.

THENCE ALONG THE NORTH LINE OF SAID DEDICATED RIGHT OF WAY, SOUTH 89°48'58" WEST, 1,089.01 FEET TO A POINT ON THE WEST LINE OF SAID SOUTHWEST QUARTER.

THENCE ALONG THE WEST LINE OF SAID SOUTHWEST QUARTER, NORTH 00°12'48" EAST, 1,295.63 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE SOUTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 1,089.01 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA, NORTH 89°48'58" EAST, 1,077.57 FEET, TO THE MOST SOUTHWESTLY SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 316.90 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 89°48'58" EAST, 594.03 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 633.80 FEET TO THE NORTHEAST CORNER OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE WESTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 570.93 FEET TO A POINT ON THE WEST LINE OF THAT REAL PROPERTY DESCRIBED AS PARCEL NO. 2 IN DOCUMENT NO. 2009-1021524, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE WESTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2009-1021524, NORTH 00°12'02" WEST, 357.04 FEET TO A POINT ON THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14, SOUTH 89°48'58" WEST, 1,089.01 FEET TO AN ALUMINUM CAP, MARKED PLEN PLUS 421377 FOUND AT THE CENTER OF SAID SECTION 14.

THENCE ALONG THE WEST LINE OF SAID NORTHEAST QUARTER, NORTH 00°12'48" EAST, 2,607.85 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 33.0 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 810.02 FEET TO A POINT ON THE EAST LINE OF THE WEST 810.02 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'48" WEST, 1,050.02 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1053.0 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 811.78 FEET TO A POINT ON THE EAST LINE OF THE WEST 1053.0 FEET OF THE EAST HALF OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'02" WEST, 633.80 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1715.99 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 1,188.86 FEET TO A POINT ON THE WEST LINE OF THE EAST 33.0 FEET OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 823.34 FEET.

THENCE CONTINUING ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 1,308.02 FEET TO A POINT ON THE NORTH LINE OF THE SOUTH 1,333.80 FEET OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 89°48'58" WEST, 958.17 FEET.

THENCE SOUTH 89°48'58" WEST, 287.98 FEET.

THENCE SOUTH 00°12'02" EAST, 633.80 FEET.

THENCE SOUTH 89°48'58" WEST, 285.94 FEET.

THENCE SOUTH 00°12'02" EAST, 348.90 FEET TO THE POINT OF BEGINNING.

SAID PARCEL CONTAINING 3,752,358 SQUARE FEET OR 173.838 ACRES, MORE OR LESS.

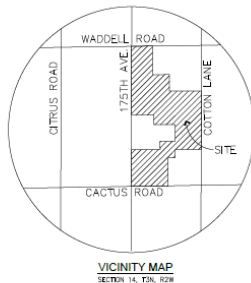
MAGNOLIA PRELIMINARY PLAT SURPRISE, ARIZONA

A PORTION OF THE EAST HALF OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA & SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA

SITE DATA

EXISTING ZONING: 110.0 A
GRID AREA: 101.4
NET AREA: 101.4
GROSS AREA: 101.4
NET AREA: 101.4
GROSS AREA: 101.4

89-48 PUD 6 89-48 PUD
110.0 A (89-48, 74.5 A) (89-48, 35.5 A)
101.4 (89-48, 74.5 A) (89-48, 35.5 A)
101.4
101.4
101.4
101.4



VICINITY MAP
SECTION 14, T3N, R2W
N10E

FLOOD ZONE CERTIFICATION

THIS IS TO CERTIFY THAT A PORTION OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE FLOOD HAZARD AREA AS SHOWN ON THE PLAT OF SURVEY AND THAT THE REMAINDER OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE UNSHADDED ZONE. FLOOD HAZARD AREA (FHA) PARCEL NUMBER: 010130148, DATED OCTOBER 16, 2013, AS PROVIDED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA). THE FLOOD ZONE BOUNDARY IS LOCATED BY SCALED MAP LOCATION AND GRAPHIC PLOTTING ONLY.

ZONE "A" AS DEFINED BY FEMA IS: SPECIAL FLOOD HAZARD AREAS INUNDATED BY THE 1% ANNUAL CHANCE FLOOD, NO LONGER FLOOD DEPENDENT.

SHADDED ZONE "X" AS DEFINED BY FEMA IS: AREAS OF 1% ANNUAL CHANCE FLOOD AREAS OF 1% ANNUAL CHANCE FLOOD WITH AVERAGE DEPTH OF LESS THAN 1 FOOT OR WITH GRAVITATIONAL AREAS LESS THAN 1 SQUARE MILE, AND AREAS PROTECTED BY LEVEES FROM 1% ANNUAL CHANCE FLOOD.

DEVELOPER

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PHOENIX, ARIZONA 85034

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CONTACT: JOSEPH HADWIN
PLANNER

LIA LORAN DESIGN STUDIO
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TULSA, ARIZONA 85029

PHONE: (480) 994-0984
CONTACT: LIA LORAN
ENGINEER

SAUNDERS AND ASSOCIATES, INC.
4600 EAST WASHINGTON STREET, SUITE 250
PHOENIX, ARIZONA 85034

PHONE: (602) 478-5151
FAX: (602) 478-5151
EMAIL: ryan@saunders.com

SHEET INDEX

1 COVER SHEET
2 DETAIL AND CROSS SECTIONS
3-14 PRELIMINARY PLAT
15-17 BORING AND MARKING PLANS
18-20 SOLID WASTE COLLECTION ROUTE

BASIS OF BEARING

SOUTH 89°48'58" WEST, THE MEASURED BEARING BETWEEN A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND COTTON LAKE AND A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND 175TH AVENUE AS SHOWN HEREIN, UTILIZING THE LIDAR SMARTNET GPS NETWORK.

RELATIVE TO MARICOPA COUNTY, ARIZONA LOW DESCRIPTION PROJECTION.

LINEAR UNIT: INTERNATIONAL FEET
ANGULAR UNIT: DEGREES
PROJECTION TYPE: LAMBERT CONFORMAL CONIC (SINGLE PARALLEL)

LATITUDE OF ORIGIN: 33°15'00" N
CENTRAL MERIDIAN: 112°15'00" W
FALSE NORTHING: 1,500,000.000 IN
FALSE EASTING: 2,500,000.000 IN
STANDARD PARALLEL SCALE: 1.000000 (EXACT)

BENCHMARK

2 INCH CITY OF SURPRISE BRASS OR WITH RAISED DATUM POINT - MARKED CITY OF SURPRISE BENCHMARK 2017 1008.7 - LOCATED ON TOP OF GRANITE CURB APPROXIMATELY 700 FEET NORTH OF THE INTERSECTION OF CACTUS ROAD AND COTTON LAKE ON THE EAST SIDE OF COTTON LAKE.

ELEVATION 1246.65 NORTH AMERICAN VERTICAL DATUM 1988 (NAV88)

LEGEND

- CENTERLINE
- RIGHT OF WAY
- PROPERTY LINE
- EASEMENT
- ELECTRICAL
- GAS
- SANITARY SEWER
- TELEPHONE
- WATER
- OVERHEAD ELECTRICAL
- FLOW LINE
- IRRIGATION LINE
- PUD
- VALVE
- STORM DRAIN
- SEWER MANHOLE
- SEWER CLEANOUT
- EXISTING ELEVATION CONTOUR
- FLOW ARROW
- SIGN
- WATER VALVE
- FIRE HYDRANT
- GRADE BREAK
- MATCH LINE
- PARCEL LINE
- FLOODPLAIN UNITS



FS16-392
Preliminary Plat

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

ANNEAL CASE #
F16-477
DRAWING CASE #
F16-392

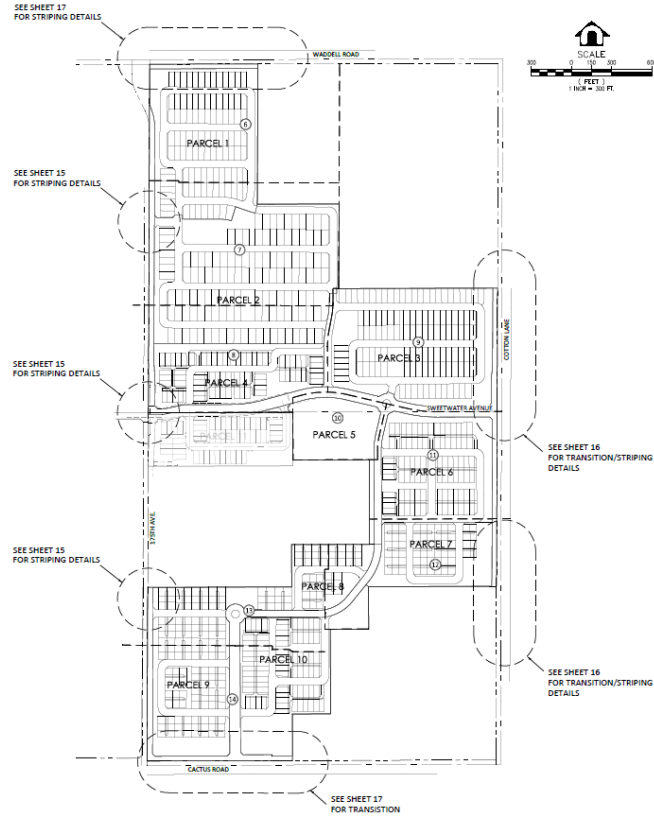
SECTION 14
TOWNSHIP 3N
RANGE 2W

JOB NO.
A00000002

1 SHEET
OF 20



Primary Plat

[illegible]

Preliminary Plat



FS16-392

- 812 Lots Total
 - 215, 45' x 110 Standard Lots in the RM-6 PUD Zoning District
 - 125, 55' x 115' Standard Lots in the RM-6 PUD Zoning District
 - 224, Alley Loaded Lots in the RM-9 PUD Zoning District
 - 248, Cluster Lots in the RM-9 PUD Zoning District

Preliminary Plat



FS16-392

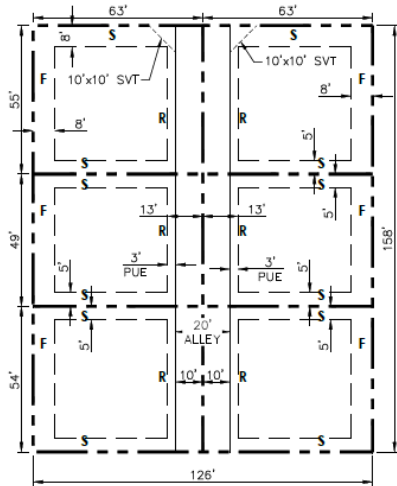
- Will integrate with 175th & Sweetwater Project
- Phase I must plat concurrently with 175th & Sweetwater Project or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities with the 175th & Sweetwater project and be part of a combined Magnolia HOA

Preliminary Plat

FS16-392



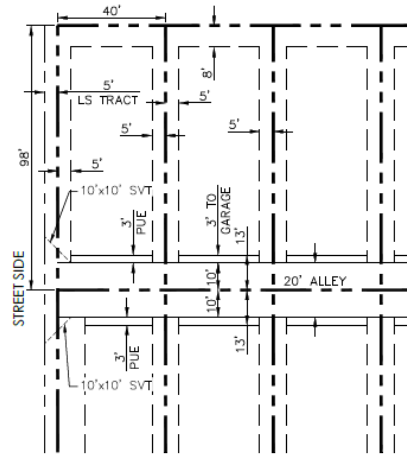
CLUSTER PRODUCT



F	= FRONT YARD
R	= REAR YARD
S	= SIDE YARD

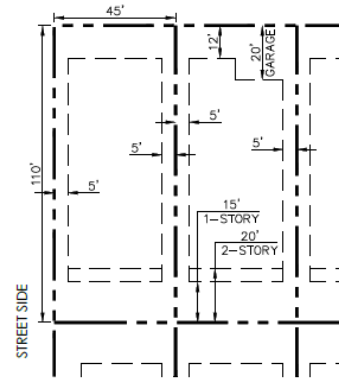
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
STREET SIDE:	8' (10' WHERE ADJACENT TO AN 8' PUE)
REAR: (ALLEY)	13'

ALLEY PRODUCT (3,920 S.F.)



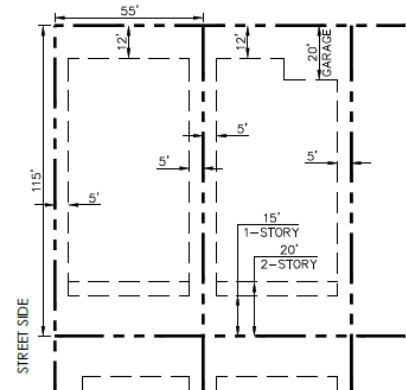
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
REAR: (ALLEY)	13'

45' X 110' LOT SIZE (4,950 S.F.)



FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

55' X 115' LOT SIZE (6,325 S.F.)

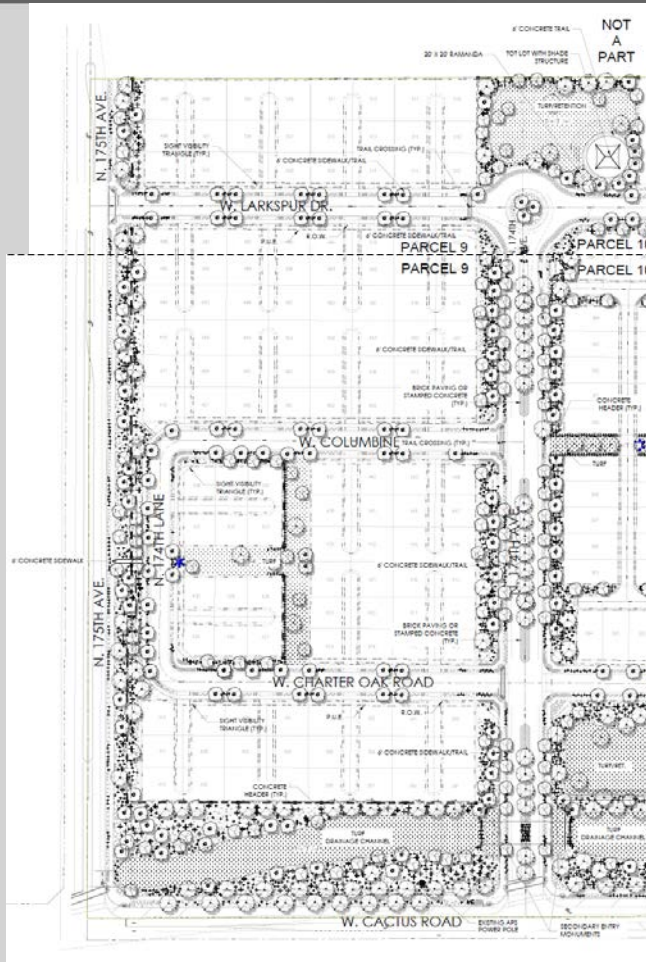


FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

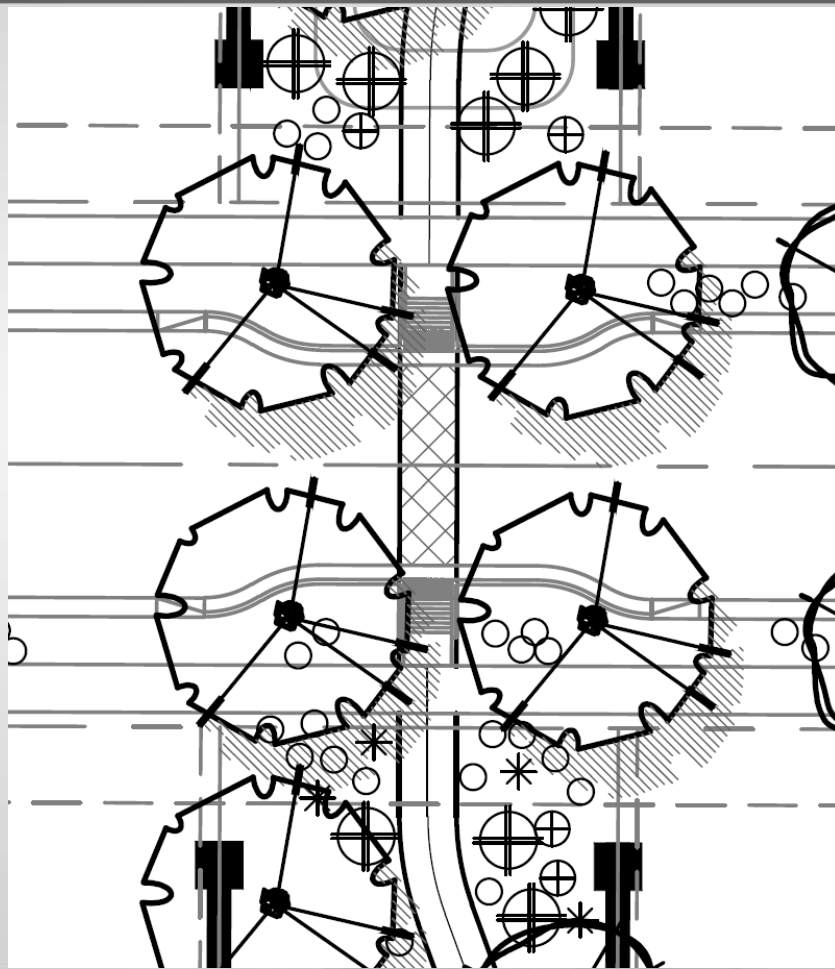
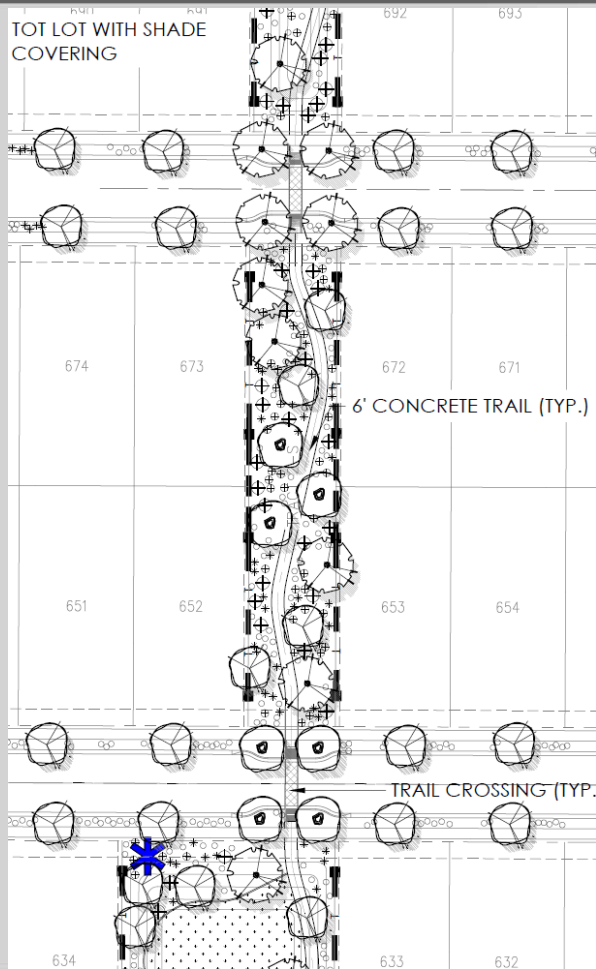


FS16-392

Preliminary Plat

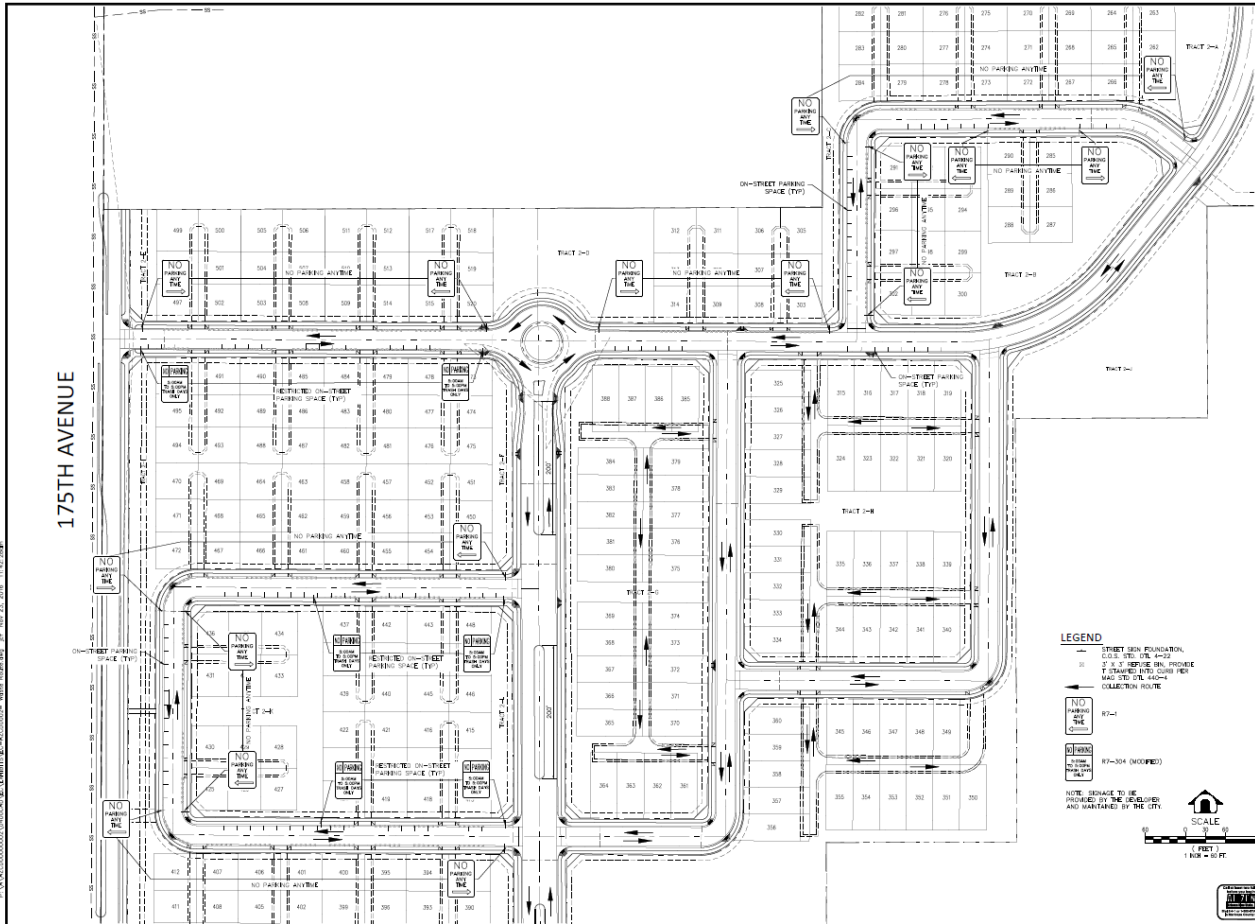


TOT LOT WITH SHADE
COVERING



FS16-392

Preliminary Plat



FS16-392

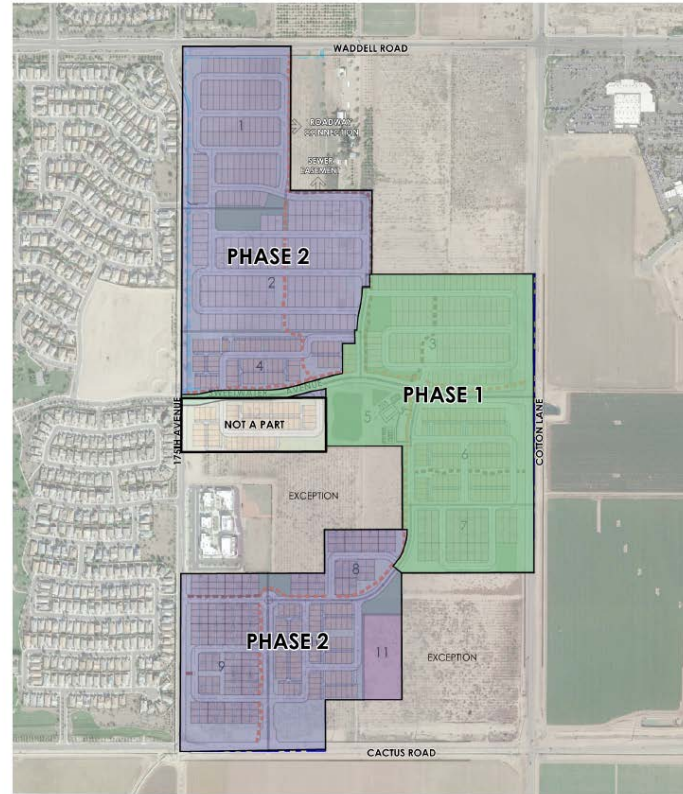
Preliminary Plat

[illegible]



FS16-392

Preliminary Plat



LVA urban design studio
land planning • development entitlements • landscape architecture
120 south oak avenue • tempe, arizona 85281 • 480.794.0994

MAGNOLIA

FIGURE 8: CONCEPTUAL PHASING PLAN

APPROX. SCALE: 1/8" = 1' 1/4"

1/8" = 1' 1/4" DRAWN BY: PR



9/8/16

PRELIMINARY - NOT FOR CONSTRUCTION - SUBJECT TO ENGINEERING AND CITY REVIEW AND APPROVAL - © COPYRIGHT LVA URBAN DESIGN STUDIO, L.L.C.
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of and/or reproduction of this document without written authorization and citation to LVA Urban Design Studio, L.L.C. shall be without liability to LVA Urban Design Studio, L.L.C.
U:\1640-MAGNOLIA\CD\PLANNING\1640-FIGURE 8-CONCEPTUAL PHASING PLAN.dwg Sep 8, 2016

Commission Recommendation:



- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

Preliminary Plats:

2nd Pre-plat request:

- ## ➤ FS16-391 175th & Sweetwater

17 5th & Sweetwater

Preliminary Plat

Preliminary Plat

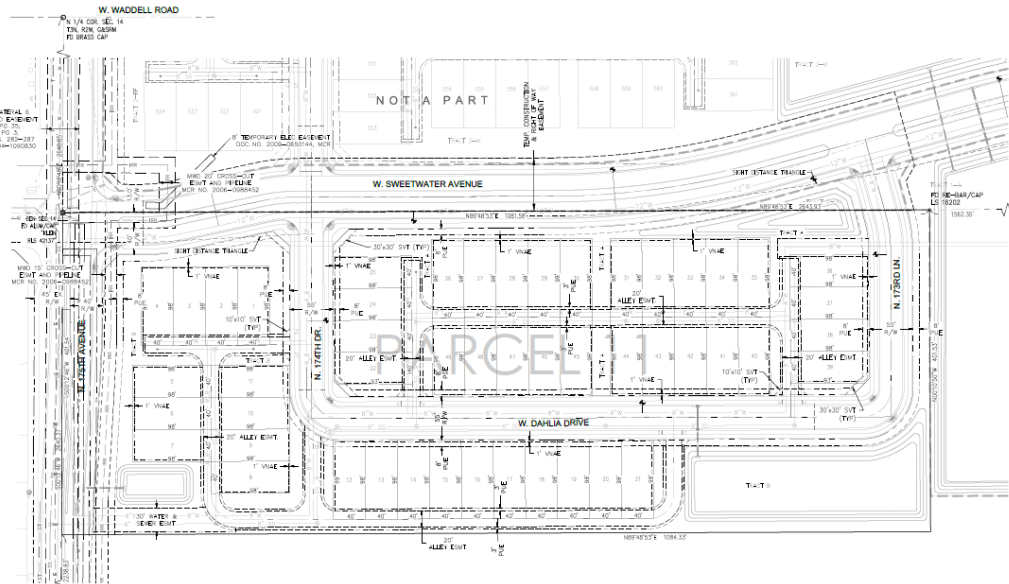
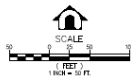
175th & Sweetwater
FS16-391

- 49 Alley Loaded Lots in RM-9 PUD Zoning District
- Will integrate with Magnolia
- Must plat concurrently with Magnolia Phase I or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities and be part of the Magnolia HOA

Preliminary Plat

175th & Sweetwater
FS16-391

PRELIMINARY PLAT	DATE: 1/1/2016	BY: [Signature]
SEC 175TH AVE & SWEETWATER	DATE: 1/1/2016	BY: [Signature]
CITY OF SURPRISE, ARIZONA	DATE: 1/1/2016	BY: [Signature]
PRELIMINARY PLAT	DATE: 1/1/2016	BY: [Signature]
SEC 175TH AVE & SWEETWATER	DATE: 1/1/2016	BY: [Signature]
CITY OF SURPRISE, ARIZONA	DATE: 1/1/2016	BY: [Signature]
PRELIMINARY PLAT	DATE: 1/1/2016	BY: [Signature]
SEC 175TH AVE & SWEETWATER	DATE: 1/1/2016	BY: [Signature]
CITY OF SURPRISE, ARIZONA	DATE: 1/1/2016	BY: [Signature]
PRELIMINARY PLAT	DATE: 1/1/2016	BY: [Signature]
SEC 175TH AVE & SWEETWATER	DATE: 1/1/2016	BY: [Signature]
CITY OF SURPRISE, ARIZONA	DATE: 1/1/2016	BY: [Signature]



TRACT TABLE

TRACT NAME	AREA (AC)	PURPOSE
A	0.794	OPEN SPACE, ALLEY EASEMENT, SIDEWALK EASEMENT, DRAINAGE, AND COMMUNITY AMENITIES
B	2.374	OPEN SPACE, ALLEY EASEMENT, SIDEWALK EASEMENT, DRAINAGE, AND COMMUNITY AMENITIES
TOTAL	3.168	

NOTE:
MINIMUM LOT THICKS TO BE PROVIDED
ON FINAL PLAT



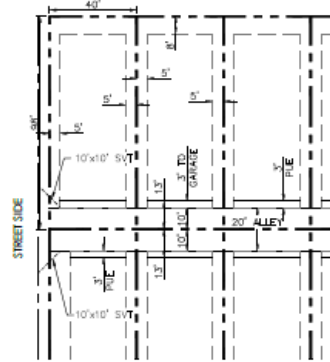
P:\A\2015\175th & Sweetwater\175th & Sweetwater.dwg 1/1/2016 10:00 AM

Preliminary Plat

175th & Sweetwater
FS16-391

ALLEY PRODUCT (3,920 S.F.)

FRONT STREET



FRONT:	8' 110' WHERE ADJACENT TO AN 8' PUEL
SIDE:	5'
REAR: (ALLEY)	13'

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



Commission Recommendations*:

*** Assumes prior City Council approval of related annexation)**



175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

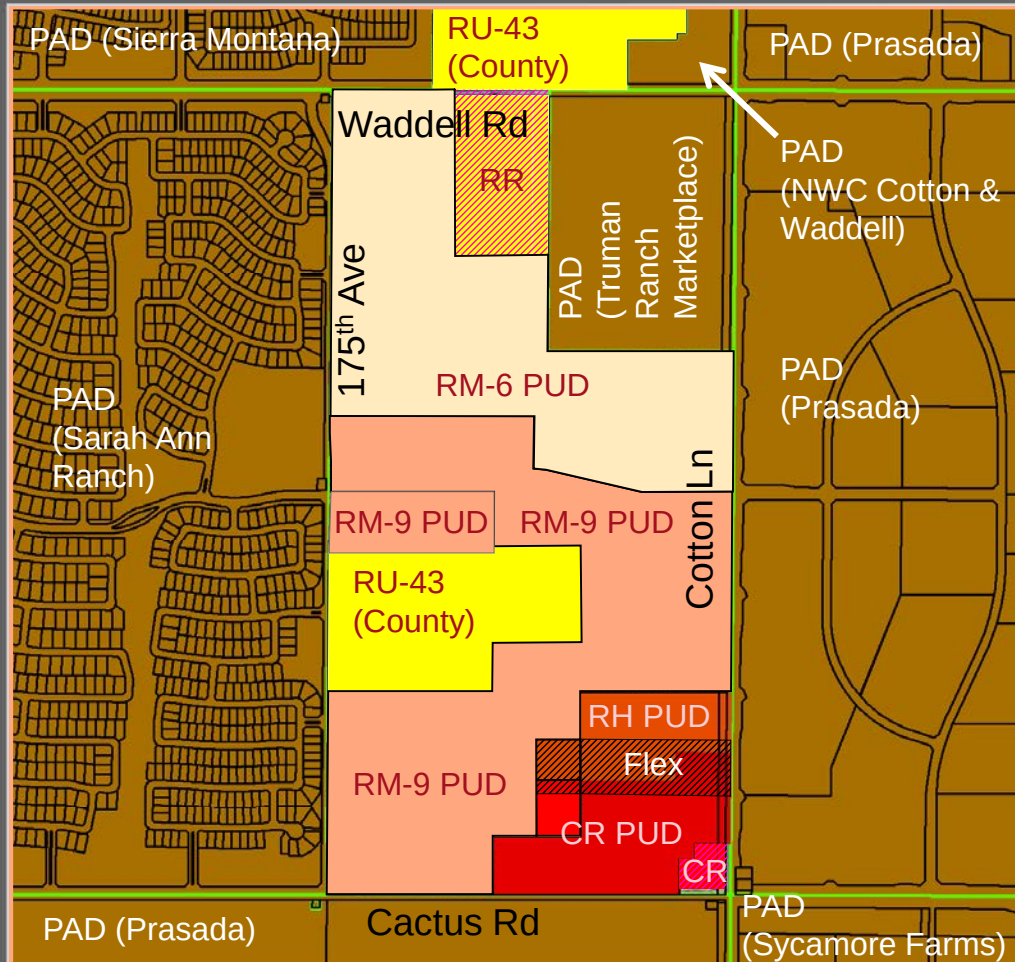


SURPRISE

ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning

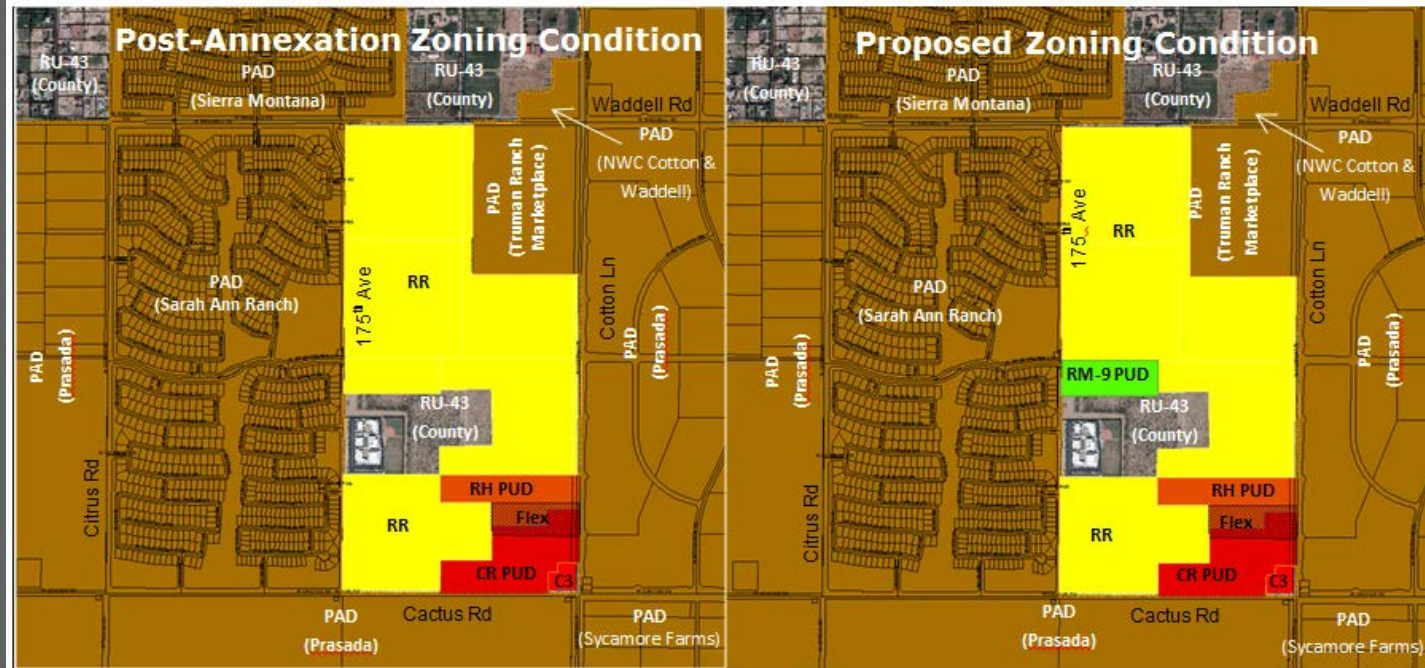


175th & Sweetwater
FS16-391

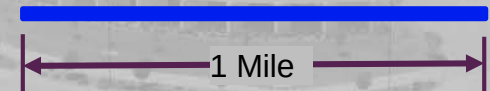
- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning

**FS16-391
175th &
Sweetwater
Rezone**

Case Map



North



175th & Sweetwater

A RESIDENTIAL DEVELOPMENT
SURPRISE, ARIZONA

PUD ZONING APPLICATION
DECEMBER 2016

PROJECT TEAM

Developer: Surprise Village Partners, LLC
c/o AZ Community Development, LLC
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(602) 499-0899

Land Planner: LVA Urban Design Studio, LLC
Mr. Mark Reddie
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Traffic: CivTech
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10605 N. Hayden Road, Suite 140
Scottsdale, AZ 85260
(480) 659-4250



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- A. Legal Description and ALTA Survey
- B. Traffic Impact Analysis
- C. Master Drainage Report
- D. Master Water Report
- E. Master Wastewater Report

1.0 DESCRIPTION OF REQUEST

1.1 Introduction

On behalf of Surprise Village Partners, LLC, Managed by AZ Community Development, LLC, LVA Urban Design Studio, LLC is requesting a zone change from 10 acres of R1-43 to 10 acres of RM-9 PUD. This request includes a PUD Overlay on 10-acres located at the southeast corner of 175th Avenue and Sweetwater Avenue. The site is a rectangular-shaped parcel located $\frac{3}{4}$ mile west of the Loop 303 freeway, and is bounded by the Paradise Honor School property to the south, the planned Magnolia development to the east, Sweetwater Avenue to the north, and 175th Avenue to the west. See **Figure 1, Vicinity Map** for the property boundary and general location and **Appendix A, Legal Description and ALTA Surveys** for the legal boundaries of the property. Concurrent with this request, the applicant will be submitting an Annexation application and a Preliminary Plat for the property as well. Note that a companion zoning application and preliminary plat is also being processed for an additional 178-acre property surrounding this site. Upon annexation, rezoning and platting, the intent is to include this parcel within the overall Magnolia master planned community.

1.2 Project Overview and Zoning Request

The proposed project will be developed as a single-family residential development within an active growth area of the City of Surprise. While being zoned separately, the intent is to include this property within the overall Magnolia master planned community, which will include a blend of various lot sizes, a centralized community center, an abundance of active and passive open spaces, a connected trail system, and attractive landscaping throughout. The residential zoning for the property is RM-9 PUD using the Conventional Character Pattern. See **Figure 2, Proposed Zoning Map** for the location of the zoning district boundary. The RM-9 PUD zoning designation is affiliated with a 3,000 square foot minimum lot size.

175th & Sweetwater Avenue will include up to 55 residential units which translates to a maximum gross density of 5.5 dwelling units per acre. This is consistent with the 2-8 dwelling units per acre density range permitted within the Neighborhood General Plan Land Use designation. While lot sizes may vary with the final development plan, the concept plan includes a proposed 40' x 98' alley product.

1.3 Residential Zoning Designations and Development Standards

The residential zoning designation affiliated with the property will use the Conventional Character Pattern in accordance with **Section 122-33** of the Surprise Unified Development Code as may subsequently amended. The PUD overlay designation shall be applied to the property to allow modification of various development standards proposed within the development. Unless specifically modified herein, the development of the property shall comply with **Chapter 122** of the Surprise Municipal Code. In the event of a conflict between a development standard, provision or regulation between the rezoning application and the Surprise Municipal Code, the standard within this rezoning application shall prevail.

The property will be zoned RM-9 PUD. The proposed residential development standards affiliated with the RM-9 PUD zoning district will be modified as provided in **Table 1, RM-9 PUD Development Standards** below. Note that only “red” text items include modified standards. These amended development standards were created based on the anticipated

lot size and product type proposed within the community in concert with the creation of meaningful, connected open space and a community design that emphasizes a high quality visual appearance throughout the community. One of the possible features that may be provided is an alley-loaded product where the vehicle garages are accessed off a rear alley, de-emphasizing the garage from public view, creating an attractive, pedestrian-oriented environment from the public realm. If provided, the alleys will be a minimum of 20' in width (10' on either side of the lot line) with 3' concrete ribbon on either side (26' minimum between structures), with the garage door at the back of the concrete ribbon. This design standard supports the 13' rear setback requirement proposed in the RM-9 PUD standards.

Table 1: RM-9 PUD Development Standards

Development Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35

Footnotes:

(1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a PUE, in which case the minimum front setback shall be 10').

(2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.

(3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.

1.4 Residential Development Plan Concept

The development plan concept represented in **Figure 3** is non-regulatory and subject to change without triggering an amendment to the zoning, but has been provided to graphically illustrate how the property may be developed, including roadway access and

connectivity, relationship between surrounding properties, general lot configuration, and location and size of open spaces. The development plan concept represented in **Figure 3** identifies a 40' x 98' alley-loaded product that provides vehicle access from a rear alley and pedestrian access from the public street or common open space courtyard. This product option allows for a smaller lot size while ensuring that garages do not dominate the streetscape. The front doors and livable space within this product type will face the public street or common open space, creating an attractive streetscape environment that is oriented toward pedestrians rather than vehicles and garage doors. Garage doors are located within an alley, and are shielded from public street view. While Sweetwater Avenue begins to curve to the north, two points of access will be provided along Sweetwater at the east and west ends of the site. Additional right-of-way will be dedicated on the Magnolia property to provide the eastern connection to Sweetwater Avenue. See **Figure 3, Development Plan Concept** for a visual representation of the conceptual development plan option for the property.

1.5 Circulation Plan

The site is bounded by 175th Avenue to the east and the future Sweetwater Avenue alignment to the north, both of which are classified as Residential Collector streets with a 40' half street right-of-way. Where Sweetwater Avenue begins to curve north, additional right-of-way will be provided to ensure the connection to the local street within the development.

Primary access to the property will be from Sweetwater Avenue, with a looped local street system connecting on the east and west sides of the property. Internal alleys will provide access to garages for each of the residential lots. As part of the larger adjacent Magnolia development, Sweetwater Avenue will be constructed from 175th avenue to Cotton Lane, providing additional access to and from the property.

A Traffic Statement for the property has been prepared and is included with this rezoning application as an Appendix under separate cover.

Bicycle lanes will be provided on Sweetwater Avenue and 175th Avenue in accordance with the City's standard detail for Residential Collector Streets to facilitate bicycle movements within and adjacent to the property. Pedestrian circulation will include setback sidewalks along public streets, and a 6-foot trail that will connect the internal open space to Sweetwater Avenue. The trail is shown on **Figure 4, Open Space and Trails Master Plan**.

1.6 Landscape Theme and Community Character

The overall landscape theme will use elegant and traditional old-world trees and shrubs that are found on the low-water use plant list. Primary trees include Oak and Ash; with secondary trees including Evergreen Elm, Italian Cypress, Ficus, Vitex, Bahuania, and pollen free Swan-Hill Olive trees. Aromatic white-flowering plants may include Jasmine, Citrus, Natal Plum, Gardenia, and Plumeria. Old-fashioned garden-style plants may include English Ivy, Lily, White Lantana, Indian Hawthorn, Boxwood, Pentas, Vinca, Lady Bank's Rose, Myrtle, Rosemary, Guara, and Verbena. While many of these aromatic and old-fashioned plants may be included in select locations throughout the community, due to the harsh desert climate, selected colorful desert shrubs and groundcover plants will also be included throughout. A complete list of plant materials will be provided at the time of preliminary plat, and shall conform to Chapter 122 of the Surprise Municipal Code as may be subsequently amended.

The property's character and hardscape elements will include formal tones and elegant simplicity that are characteristic of traditional architecture. Theme walls and signage will use simple forms of stucco, single scored block, cast stone and ornamental iron. Precast concrete floral accent plaques and brick may be used as accent materials for walls and paving. To provide a pleasing contrast with the many shades of green and white present in the plant materials, the hardscape color scheme will build a white, gray and black foundation palette, accented with bright bursts of color at focal points and in site furniture. See **Figure 5**, *Wall Details* for the design concept for the various wall types proposed within the development.

1.7 Open Space, Trails and Amenities Plan

175th & Sweetwater will provide perimeter and internal open spaces, a pocket park and 6-foot trail that will encourage walking and pedestrian connectivity within the larger surrounding community. A minimum 40' wide landscape buffer will be provided along 175th Avenue to include landscaping and neighborhood entry monuments at the roadway entry into the community. This exceeds the minimum landscape buffer requirement of 15' by more than double. The pocket park will include active and passive recreational amenities such as shade ramadas, picnic areas, informal play field and landscaping to serve the residents within the development. The property will provide a minimum of 25% open space, a 5% increase in the 20% requirement per the Conventional Character Pattern standard.

1.8 Drainage Master Plan

The site generally slopes in a southeasterly direction. 175th Avenue is an improved half street adjacent to the site. There is street median with full section fronting the school site and there is full section at the intersection of 175th Avenue and Waddell Road. The road slopes in a southerly direction and there is a large catch basin south of the intersection of 175th Avenue and Waddell Road that captures the street runoff into the street storm drain system. The site is located mostly in Zone X according to FIRM Panel 04013C1660L, revised October 2013.

The intent of the grading design is to convey the runoff generated onsite during a 100-year 2-hour storm event or smaller into retention basins, located within the subdivision. The roadways will convey the street runoff to the different basins, proposed in different locations of the subdivision. When the street capacity is exceeded, catch basins with a storm drain system will be installed to allow the runoff to stay within the street right way of way section.

The finish floor elevations for the site will be set higher than the adjacent 100-year water elevations and the cascading outfall elevations for the site in case of storm events beyond the 100-year storm events.

1.9 Water & Sewer Master Plans

Water

The existing water infrastructure around the site is located in pressure zone 3, per EPCOR information. Zone 3 will connect to an existing 12 inch water line at Sweetwater Avenue and 175th Avenue. The 12 inch main will be extended easterly along Sweetwater Avenue. This will serve an 8 inch loop that will be located in the roadway sections. A fire flow test was conducted and shows high static pressures at approximately 90 psi. PRVs will need

to be installed at the individual water meters. Public hydrants will be spaced along the local roadways and Sweetwater Avenue. A Master Water Report has been completed for the project and contains detailed water modeling information and results.

Sewer

The sewer will connect to an existing 12 inch sewer line in 175th Avenue to the west of the site with an 8 inch sewer at the road just south of the existing school site. The 8 inch sewer main is designed to exceed the minimum slopes required to provide 2 feet per second velocity when flowing full, and less than 0.65 d/D during the peak day demand. A master Sewer report has been prepared for this project and contains detailed modeling information and results.

1.10 Future Home Owners Association Responsibility

The community will include a home owners association (HOA) that will own and maintain all common community amenities, including signage, parks, trails, open space tracts, private alleys, and other common areas within the development. The HOA will include a formal governance structure to be established by the HOA bylaws and community Covenants, Conditions and Restrictions (CC&R's). In the early phases of the project, the HOA will be managed by the master developer or homebuilder until such time as there are enough homeowners take over the management responsibilities. The purchasers of property within the community will automatically become members of the HOA and will be required to pay annual dues for the ongoing operation and maintenance of community facilities owned by the HOA. It is the intent that this development will become part of the adjacent Magnolia community and HOA after annexation and zoning approval, however, if that does not happen, an agreement related to the dedication of all necessary right-of-way for the construction of Sweetwater Avenue will be required prior to the first phase of development of either project.

2.0. EXISTING CONDITIONS ANALYSIS

2.1 Property Location and Description

The proposed site is located on the southeast corner of 175th Avenue and Sweetwater Avenue within unincorporated Maricopa County (currently within a County island), but within City of Surprise General Planning area. More specifically, the property is a rectangular-shaped parcel generally bounded by 175th Avenue to the west, Sweetwater Avenue to the north, the planned Magnolia community to the east, and the Paradise Honors School to the south. The subject site is defined in **Appendix 1, *Legal Description and ALTA Survey***. The intent is to annex the property into the City of Surprise concurrent with this rezoning application.

The following Assessor Parcel Numbers are included with this zoning application:

502-04-002P, A&B Investments

502-04-002J, A&B Investments

2.2 Existing Land Use, General Plan Designation and Zoning

The subject property is currently vacant land that was once used for agricultural purposes. Properties surrounding the site include vacant land to the north, vacant land to

the east, vacant land and the future expansion of the Paradise Honor School to the south, and single family residential property to the west. Paradise Honors School, a K-12 charter school is located immediately adjacent to the property along 175th Avenue, and has plans to expand up to the southern property line with new classroom buildings, parking, athletic fields and other associated improvements. See **Table 2** below and **Figure 1**, *Vicinity Map* for the existing land uses on the site and surrounding area.

The proposed site is currently within the City of Surprise 2035 General Plan boundary and is designated as *Neighborhood Character Area*. The site is also within the *Residential (Citrus and Cactus) Growth Area* as defined within the Anticipated Growth map in the General Plan. The Neighborhood land use designation allows for densities up to 8+ dwelling units per acre and supports a wide variety of residential development opportunities. The proposed zoning is in conformance with the Neighborhood General Plan designation, and will utilize the *Suburban Development Type* (2-8 du/ac) throughout the community. See **Table 2** below and **Figure 6**, *Existing General Plan Land Use Map* for the general plan land use designation on the site and surrounding area.

Currently, the property is zoned RU-43 (Rural 43) in unincorporated Maricopa County, permitting 1 dwelling units per acre. The intent of this zoning district is to conserve open land use and permit farming and rural residential uses. See **Table 2** below and **Figure 7**, *Existing Zoning Map* for the existing zoning on the site and surrounding area.

Table 2: Existing Land Use, General Plan Designation and Zoning

	LAND USE	GENERAL PLAN DESIGNATION	ZONING DESIGNATION
SITE	Vacant	Neighborhood	County RU-43
NORTH	agricultural & vacant	Neighborhood	County RU-43
EAST	agricultural and vacant	Neighborhood	County RU-43
SOUTH	Vacant (future Paradise Honors School expansion)	Neighborhood	County RU-43
WEST	Single family residential	Neighborhood	PAD

2.3 Regional Facilities and Services

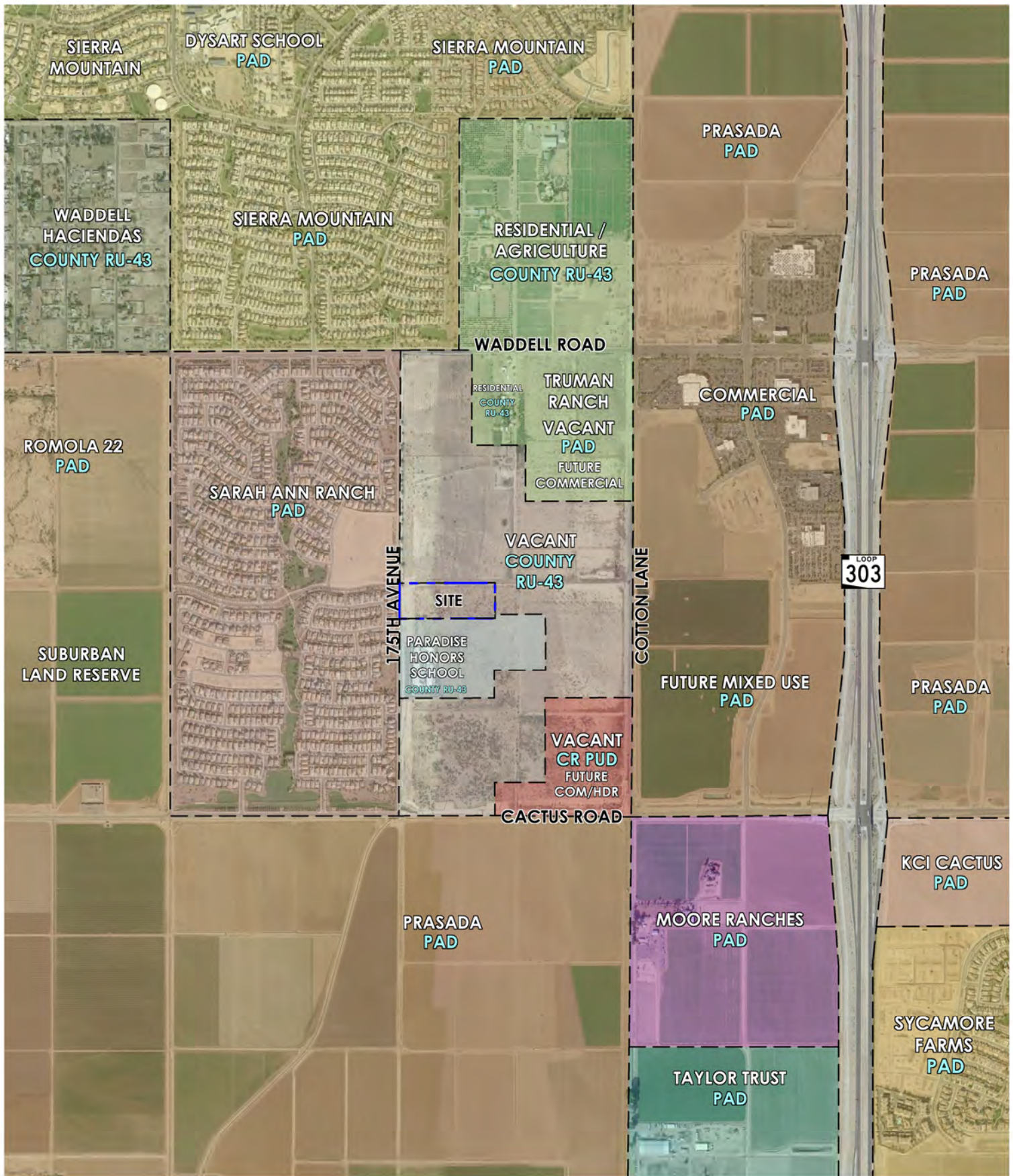
The site falls within the City of Surprise Planning Boundary, but is currently located in unincorporated Maricopa County. The site is within an area generally surrounded by the City of Surprise jurisdictional limits, making this property part of a County island. **Figure 1**, *Vicinity Map* shows the jurisdictional limits of the City of Surprise city limits in relation to lands within unincorporated Maricopa County.

The proposed property is approximately ¾ mile west of the Loop 303 Freeway, with direct access to both the Cactus Road and Waddell Road interchanges, providing excellent access to the site along the regional freeway system. The site is bounded by two residential collector roads, including 175th Avenue and the future Sweetwater Avenue alignment.

The subject property is within the Dysart Unified School District (SUSD). The property is within the boundary of the Sonoran Heights Elementary School, located at 11405 N.

Greer Ranch Parkway, and the Shadow Ridge High School, located at 10909 N. Perryville Road. Paradise School, a K-12 charter school, is also located immediately adjacent to the property at 12775 N. 175th Avenue.

Upon annexation into the City of Surprise, fire & emergency services, law enforcement services, and refuse collection will all be provided by the City. The nearest fire station, Surprise Fire-Medical Station #307, is located 2 miles east of the site near Sarival Avenue and Cactus Road. The nearest Police Station is located in Surprise City Hall, approximately 6 miles northeast of the site.





175TH & SWEETWATER

FIGURE 2: PROPOSED ZONING MAP



175TH & SWEETWATER

FIGURE 3: DEVELOPMENT PLAN CONCEPT

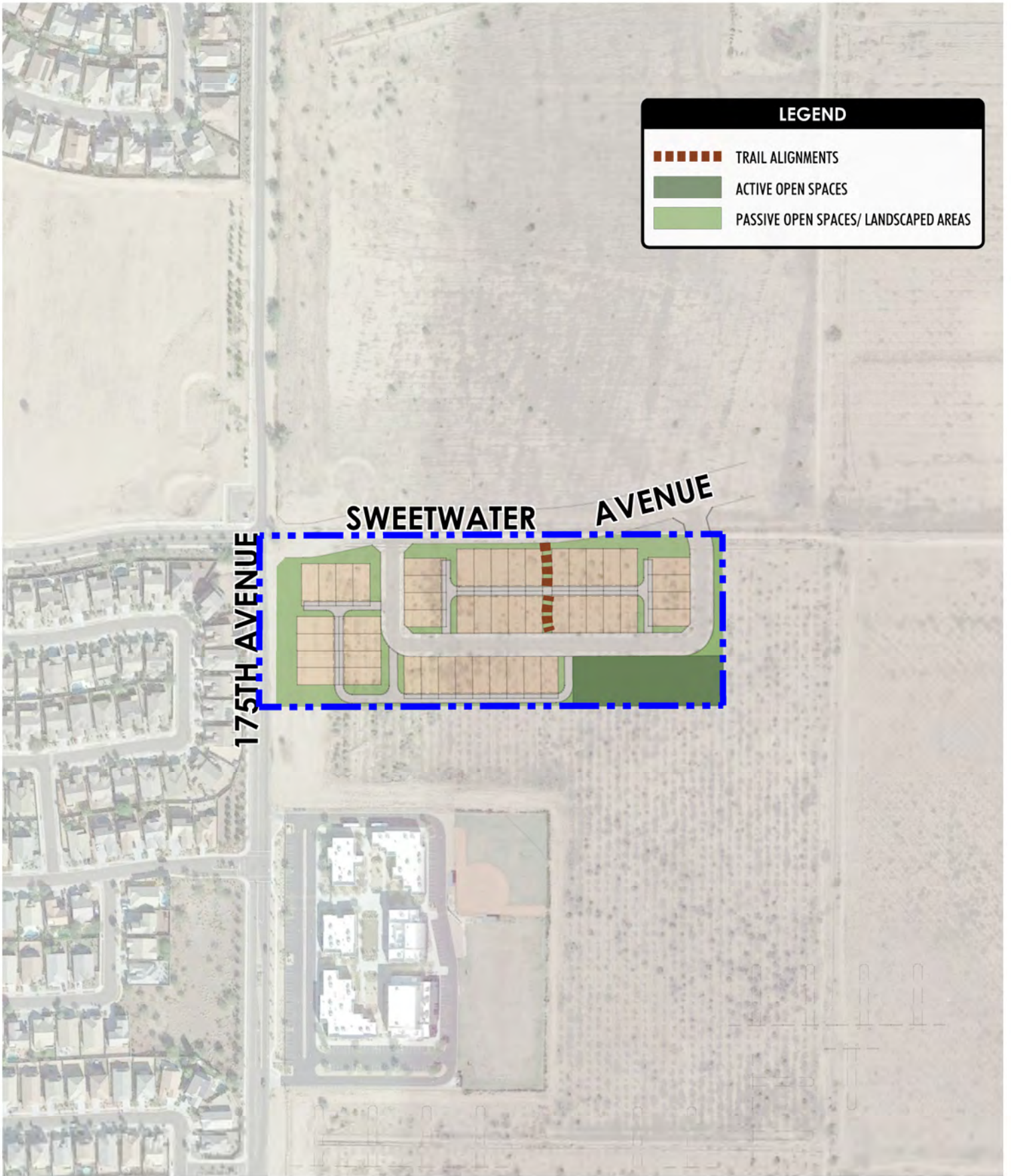
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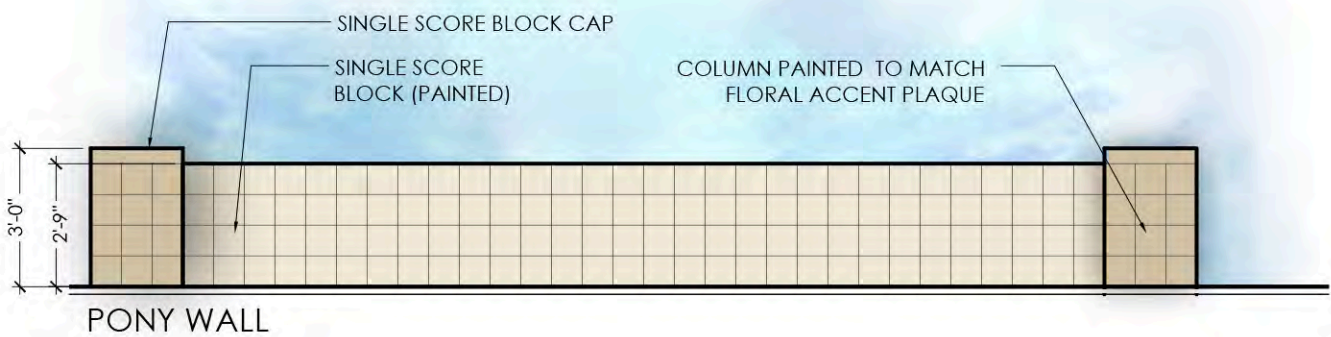
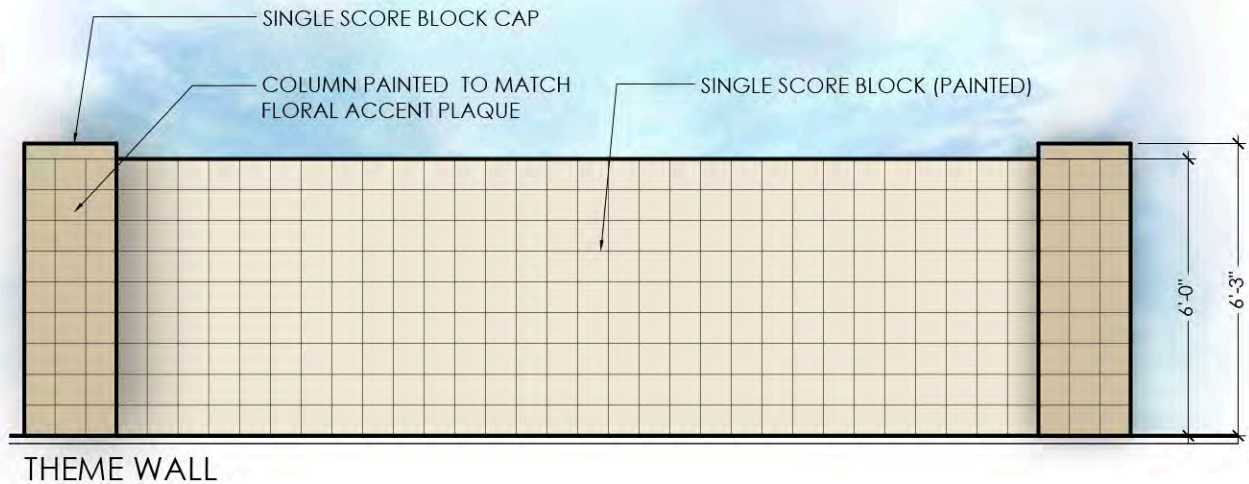
1640

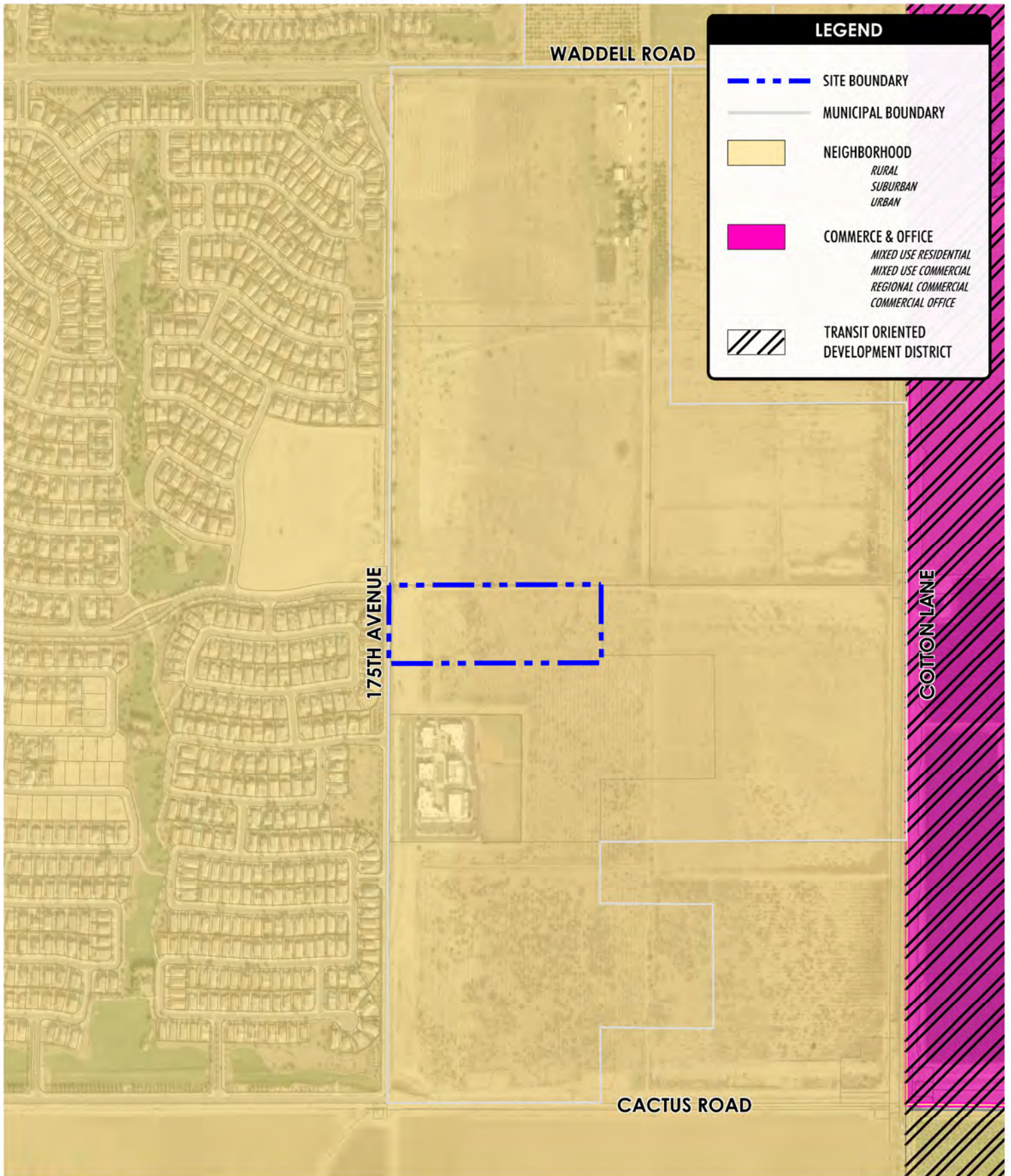
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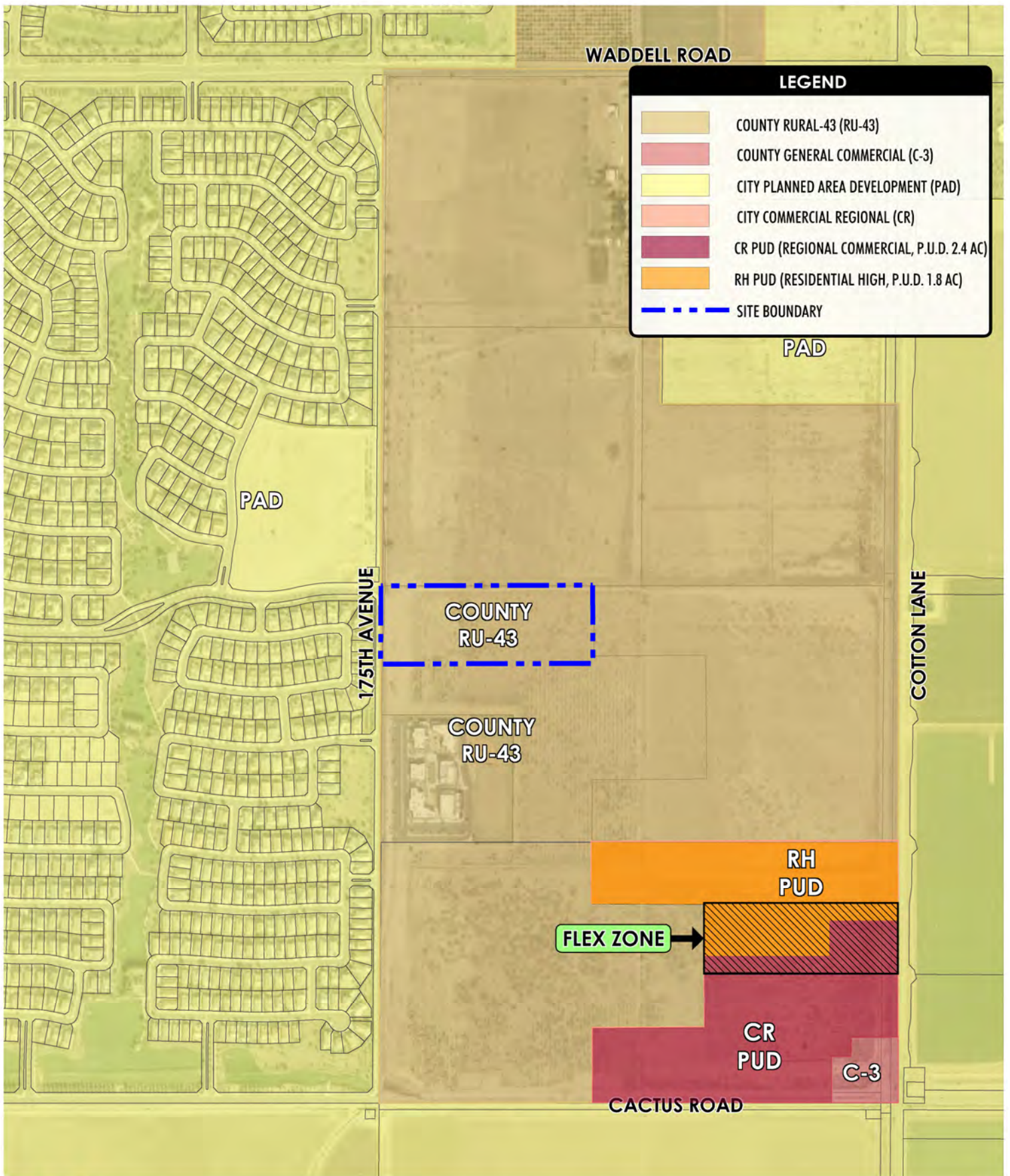


11/2/16









CITIZEN PARTICIPATION FINAL REPORT

MAGNOLIA & SWEETWATER PLANNED UNIT DEVELOPMENT

PARCEL NUMBERS: 502-04-002P, 502-04-002J, 502-04-004, 502-04-006B, 502-04-006A,
502-04-005D, 502-04-022D, 502-04-002Q, 502-04-002E, 502-04-023C, 502-04-022A,
and 502-04-002R

CITY OF SURPRISE

PREPARED BY:

LVA URBAN DESIGN STUDIO, LLC
120 E. Ash Ave.
Tempe, AZ 85281

November 2016

ANNEXATION, PUD ZONING & PRELIMINARY PLAT
(FS16-427, FS16-391 & FS16-392)

Development Team

Developer

Surprise Village Partners, LLC
c/o AZ Community Development, LLC
Mr. Joseph Kalish and Jack Hilton
11024 N. 28th Dr. Suite 170
Phoenix, AZ 85029
(602) 499-0899

Land Planner

LVA Urban Design Studio, LLC
Mr. Mark Reddie
120 South Ash Avenue
Tempe, Arizona 85281
(480) 994-0994

Civil Engineer

David Evans & Associates
Mr. Don Willie
4600 E. Washington St. Suite 250
Phoenix, AZ 85034
(602) 678-5151

Traffic Engineer

CivTech
Ms. Dawn Cartier
10605 N. Hayden Rd. Suite 140
Scottsdale, AZ 85260
(480) 659-4250

CITIZEN PARTICIPATION FINAL REPORT

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Appendices

- Appendix A: Site Posting Affidavits
- Appendix B: Neighborhood Meeting Notification Letter
- Appendix C: Daily Sun Newspaper Advertisement
- Appendix D: Meeting Exhibits
- Appendix E: Sign in Sheets & Comment Cards
- Appendix F: Scanned E-mail Comments and Responses

I. PUBLIC MEETING INFORMATION

A. Applicant Attendees:

AZ Community Development – Joseph Kalish, Jack Hilton - Owners Representatives

David Evans & Associates – Don Willie – Civil Engineer Representative

CivTech – Dawn Cartier – Traffic Engineer

LVA Urban Design Studio – Mark Reddie, Alisse Highley - Applicant/Planning Consultant

II. PROJECT DESCRIPTION

The proposed applications are requesting a zone change on 178 acres of property currently zoned R1-43 to approximately 78.6 acres of RM-6 PUD, approximately 95.2 acres of RM-9 PUD, approximately 1.8 acres of RH-PUD and approximately 2.4 acres of /CR-PUD. Note that approximately 2.3 acres within the RH-PUD and CR-PUD is in a flex zone which allows the flexibility for either zoning district based on the final site plan configuration. This request includes a PUD Overlay on the entire 178 acres located at the northeast corner of Cactus Road and 175th Avenue. Concurrent with this request, the applicant will be submitting an Annexation application and a Preliminary Plat for the property as well. Note that a companion zoning application and preliminary plat is also being processed for an additional 10-acre property at the southeast corner of 175th Avenue and Sweetwater Avenue. Upon annexation and rezoning, the intent is to include this parcel within the overall Magnolia master planned community. The public outreach activities were conducted for both projects together.

As part of the Annexation and Zoning process, a neighborhood meeting was held on October 19, 2016 as an opportunity for local residents to learn about the project, ask questions, and express their comments or concerns regarding the project.

III. MEETING LOCATION

The neighborhood meeting was held at Sunset Hills Elementary located at 17825 W. Sierra Montana Loop Surprise, Arizona on Wednesday October 19, 2016 from 6:00pm to 7:00pm.

IV. NOTIFICATION

A. REQUIRED SITE POSTING

On October 4, 2016 sixteen notification signs were posted on the subject site informing the surrounding community of the proposed applications and of the neighborhood meeting. These signs will remain in place and continue to be updated as the application advances through to City Council. **Appendix A, *Site Posting Affidavits*** includes photos of the signs, locations, and affidavits.

B. REQUIRED FIRST CLASS MAILINGS

Mailed notification letters were sent from the City of Surprise to 135 property owners and HOAs on October 6, 2016. The letters included a map of the project and details on the neighborhood meeting. A copy of the outreach letter can be found in **Appendix B, *Neighborhood Meeting Notification Letter***.

C. REQUIRED NEWSPAPER ADVERTISEMENT

An advertisement was posted in in the Daily News-Sun on September 30, 2016 with a map and details of the Citizen Review Meeting. A copy of the advertisement can be found in **Appendix C, *Daily Sun Newspaper Advertisement***.

V. PUBLIC MEETING

The applicant team arrived at Sunset Hills Elementary school to set up exhibit boards and sign in/comment card tables. Directional signs were posted in the parking lot and outdoor hallways to direct and notify residents to the meeting room. See **Appendix D, Meeting Exhibits** for a copy of all exhibits presented at the Neighborhood Meeting.

Twenty eight attendees were recorded on the sign-in sheet (See **Appendix E, Sign-In Sheet and Comment Cards**) for the open house style neighborhood meeting. Guests were greeted at the door and encouraged to walk through the exhibits with a member of the development team. Comment cards were provided throughout the meeting. The meeting came to a close at 7:15 pm.

Since the neighborhood meeting, the applicant has followed up and emailed a site plan to the six attendees who left requests via comment card. No responses have been received at this time, but the applicant will continue to accept feedback through the application process. All sent and received e-mails to date have been included with this report as **Appendix F, Scanned E-mail Comments & Responses**.

VI. MEETING PARTICIPANT FEEDBACK

Included as **Appendix E, Sign-In Sheet & Comment Cards** is a copy of all comment cards received from the October 19th meeting. Below is a response tally, brief summary of feedback, and written responses to questions and/or negative feedback in Subsection A below. Outreach response was the result of neighborhood meeting comment cards. Similar comments are grouped together.

RESPONSE TALLY

Positive Feedback – 1

Negative Feedback – 2

Informative/Suggestions/Neutral – 7

SUMMARY OF FEEDBACK

- Encouraging relocation of proposed access on to 175th Ave
- Concern about multi-family being part of the development
- Request for site plan
- Request for continual updates
- In favor of building Sweetwater
- Concern about traffic impacts

A. GENERAL COMMENTS/CONCERNS & RESPONSES

- Eliminating 175th Ave. Access
Applicant Response – A Traffic Impact Analysis was completed as part of the application. Based on the project densities, improvements and proposed mitigation, 175th Avenue is shown to operate at an acceptable level of service.
- Concern about multi-family being included in the development
Applicant Response – Multi-family is not proposed within this development. All residential is single-family detached. This addressed resident concerns regarding this issue.

- Request for Site Plan & Follow up
Applicant Response – Emails from the applicant were sent out October 21, 2016 to those who requested additional information. An open line of communication was offered as well as an attached site plan.
- Increased traffic
Applicant Response – A Traffic Impact Analysis was done as part of the zoning submittal process for both projects. The TIA's have been submitted, revised per comments, and reviewed by staff. The TIA identifies traffic impacts and improvements required to mitigate impacts. While the applicant acknowledged that traffic will increase with the proposed development, various roadway improvements and mitigation will be provided to accommodate the increased traffic in the area. The conclusions of the TIA's indicate that with the proposed improvements and mitigation, all roadways will operate at an acceptable level of service at full build out.

VII. PUBLIC CORRESPONDENCE SUMMARY AND PLAN REVISIONS

The applicant received a phone call in response to the email sent out on October 21, 2016. That call was in reference to clarification on the date of the upcoming public hearings, and the scheduled Annexation public hearing on November 15, 2016. No other correspondence has been received.

No major adjustments were necessary to address resident concerns with the project based on feedback received at the neighborhood meeting and through comment cards. The applicant remains open to resident comments, but believes the current plan does respond to all comments expressed by the residents.



**DEPARTMENT OF THE AIR FORCE
AIR EDUCATION AND TRAINING COMMAND**

3 October 2016

Mr. James R. Mitchell
Director, Community Initiatives Team
56th Fighter Wing
14185 West Falcon St.
Luke AFB AZ 85309-1629

Ms. Jamie Sullivan
Development Services Specialist
City of Surprise Planning Department
16000 N. Civic Center Plaza
Surprise AZ 85374

Re: FS16-391; 175th Ave & Sweetwater Avenue

Dear Ms. Sullivan

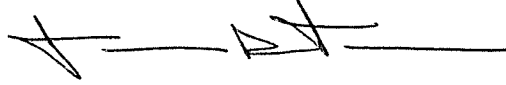
Thank you for the opportunity to provide comments on the Rezone and Preliminary Plat Application for 175th and Sweetwater Avenues. The site is on 10 net acres located at the southeast corner of 175th and Sweetwater Avenues within unincorporated Maricopa County however is within the City of Surprise General Planning Area. This request is a rezoning with a preliminary plat for a planned residential community consisting of 55 units, for an overall density of 5.5 dwelling units per acre. The subject property is currently vacant zoned Rural 43 (R-43), requested zoning for the property will be Residential Medium, Planned Unit Development (RM-9 PUD). The site is approximately 2.7 miles outside the 1988 JLUS 65 Ldn, "high noise or accident potential zone" as defined by A.R.S. § 28-8461 and is outside the "territory in the vicinity of a military airport" also defined by A.R.S. § 28-8461.

Luke AFB follows the guidelines in the Graduated Density Concept (GDC). The GDC proposes, in the absence of a more restrictive state, county or municipal general or comprehensive plan, graduating densities away from the 65 Ldn as follows: a maximum of 2 du/acre from the 65 Ldn to 1/2 mile, a maximum of 4 du/acre from 1/2 to 1 mile, and a maximum of 6 du/acre from 1 to 3 miles. The density of 5.5 du/ac meets these guidelines.

This request, as stated in the application, will not negatively impact the flying operations at Luke AFB. Since the site will be located inside the "territory in the vicinity of a military airport," it will be subjected to approximately 165 over flights a day, with some as low as 1,500 feet above ground level. We recommend you review the sound attenuation requirements found in A.R.S. § 28-8482. In addition, a strong notification program on the part of the applicant is essential to inform potential residents about Luke AFB operations.

If there are any questions, please contact my Community Planner, Ms. Barbara Plante,
at (623) 856-9981.

Sincerely

A handwritten signature in black ink, consisting of a stylized 'J' followed by a horizontal line and a small 'M'.

JAMES R. MITCHELL

cc:

Colonel David G. Shoemaker, Vice Commander, 56th Fighter Wing

Ms. Cindy L. Calderon, GS-13, General and Environmental Law Attorney, 56th Fighter Wing

Jamie,

I have reviewed the proposed FS16-391 175th Ave & Sweetwater residential development. The development does not affect any ADOT highway facilities.

We appreciate the opportunity to review and comment.

PETE ENO

Right Of Way Coordinator

205 South 17th Avenue Mail Drop 612E

Phoenix, AZ 85007

602-712-7348

azdot.gov



Jamie,

Thank you for providing the Electronic Submittal for 175th Ave. & Sweetwater (FS16-391).

MWD has reviewed this submittal and determined that the proposed development project will impact MWD. As a result, this development will require a development agreement between MWD and the developer to address the impacts to MWD's facilities and/or property interests. Please have the developer or their consultant contact MWD to discuss this project. Additionally, the developer will need to provide copies of any subdivision plats and utility and improvement plans to MWD for review and approval pursuant to the attached *MWD Drawing Requirements*, along with payment of the applicable plan review fees pursuant to the attached *MWD Fees & Payment Schedule*. Upon our review of the plat and/or plans once they are provided by the developer, MWD will copy the City on our approval and/or comments.

Thanks again,

Debbie Trasancos

Property & Contracts Specialist

Maricopa Water District

14825 W. Grand Ave.

Surprise, AZ 85374

623/546-8266

fax 623/584-2536

debbiet@mwdaz.com

ORDINANCE 2017-02

AN ORDINANCE OF THE MAYOR AND COUNCIL OF THE CITY OF SURPRISE, ARIZONA, APPROVING A REZONE APPROXIMATELY 9.9 ACRES FROM RESIDENTIAL RANCH (RR) TO RESIDENTIAL MEDIUM DENSITY 9 DU/AC PLANNED UNIT DEVELOPMENT (RM-9 PUD) FOR THE PROJECT KNOWN AS “175TH & SWEETWATER”, GENERALLY LOCATED AT THE SOUTHEAST CORNER OF 175TH AVENUE AND SWEETWATER ROAD.

WHEREAS, this Ordinance was properly noticed for public hearing and the necessary hearings and opportunity for public input were completed;

WHEREAS, the subject site is generally located at the southeast corner of 175th Avenue and Sweetwater Road;

WHEREAS, the subject site was annexed into the City of Surprise under Ordinance # 2017-01 and currently enjoys Residential Ranch (RR) zoning as a result of that annexation;

WHEREAS, the proposed use of the subject site requires modification of the applicable zoning regulations;

WHEREAS, the proposed Rezone to, Residential Medium Density , maximum 9 dwelling units per gross acre (RM-9 PUD) satisfies the requirements set forth in Chapter 122 of the Surprise Municipal Code;

WHEREAS, this Rezone is in harmony with the purposes and intent of the zoning ordinance and the Surprise General Plan; and

WHEREAS, on January 5, 2017, the Planning and Zoning Commission recommended approval of the 175th & Sweetwater development.

NOW, THEREFORE, BE IT ORDAINED by the Mayor and Council of the City of Surprise, Arizona, as follows:

Section 1. *Rezoning.* The parcel legally described on Exhibit A and depicted on Exhibit B, known as “175th & Sweetwater” is rezoned from Residential Ranch (RR) to Residential Medium Density, maximum 9 dwelling units per gross acre (RM-9 PUD) in a manner consistent with the Zoning Map included in Exhibit B subject to the following stipulations:

- a. Development and use of the site shall be in substantial conformance with the project narrative entitled “175th & Sweetwater”, prepared by LVA Urban Design Studio, dated revised December 2016 and stamped received December 6, 2016, except as modified by the following stipulations.
- b. Approval of this zone change request presumes the successful annexation of the subject property as being processed under FS16-427. Should said annexation request fail, the zoning of the property granted under this ordinance shall not take effect and this ordinance shall be null and void.
- c. Non-compliance with the stipulations of approval of this case will be treated as a violation in accordance with the provisions of Article XIV of the Surprise Unified Development Code.

Section 2. *Amendment of Zoning Map.* The City of Surprise zoning map is herewith amended to reflect the change in districts referred to in Section 1 above.

Section 3. *Codification.* This Ordinance is not of a general nature and shall not be codified.

Section 4. *Repeal of Conflicting Ordinances.* All ordinances or parts of ordinances in conflict with the provisions of this ordinance or any part of the code adopted herein by reference are hereby repealed, upon the effective date of this Ordinance.

Section 5. *Severability.* If any section, subsection, sentence, clause, phrase or portion of this ordinance is for any reason held to be invalid or unconstitutional by the decision of any court of competent jurisdiction, such decision shall not affect the validity of the remaining portions thereof.

Section 6. *Effective Date.* This ordinance shall become effective at the time and in the manner prescribed by law.

APPROVED AND ADOPTED this _____ day of _____ 2017.

Sharon R. Wolcott, Mayor

Attest:

Approved as to form:

Sherry Aguilar, City Clerk

Robert Wingo, City Attorney

EXHIBIT "A"

DESCRIPTION

175th & SWEETWATER ZONE CHANGE from RR to RM-9 PUD

A portion of the southeast quarter of Section 14, Township 3 North, Range 2 West of the Gila and Salt River Base and Meridian, City of Surprise, Maricopa County, Arizona described as follows;

BEGINNING at the center quarter corner of said Section 14 from which the south quarter corner of said Section 14 lies South 00°12'46" West 2640.37 feet;

Thence along the east-west midsection line of said Section 14 North 89°48'53" East 1081.58 feet;

Thence departing said midsection line South 00°11'02" East 401.53 feet;

Thence South 89°48'53" West 1084.33 feet to the north-south midsection line of said Section 14;

Thence along said midsection line North 00°12'46" East 401.54 feet to the POINT OF BEGINNING.

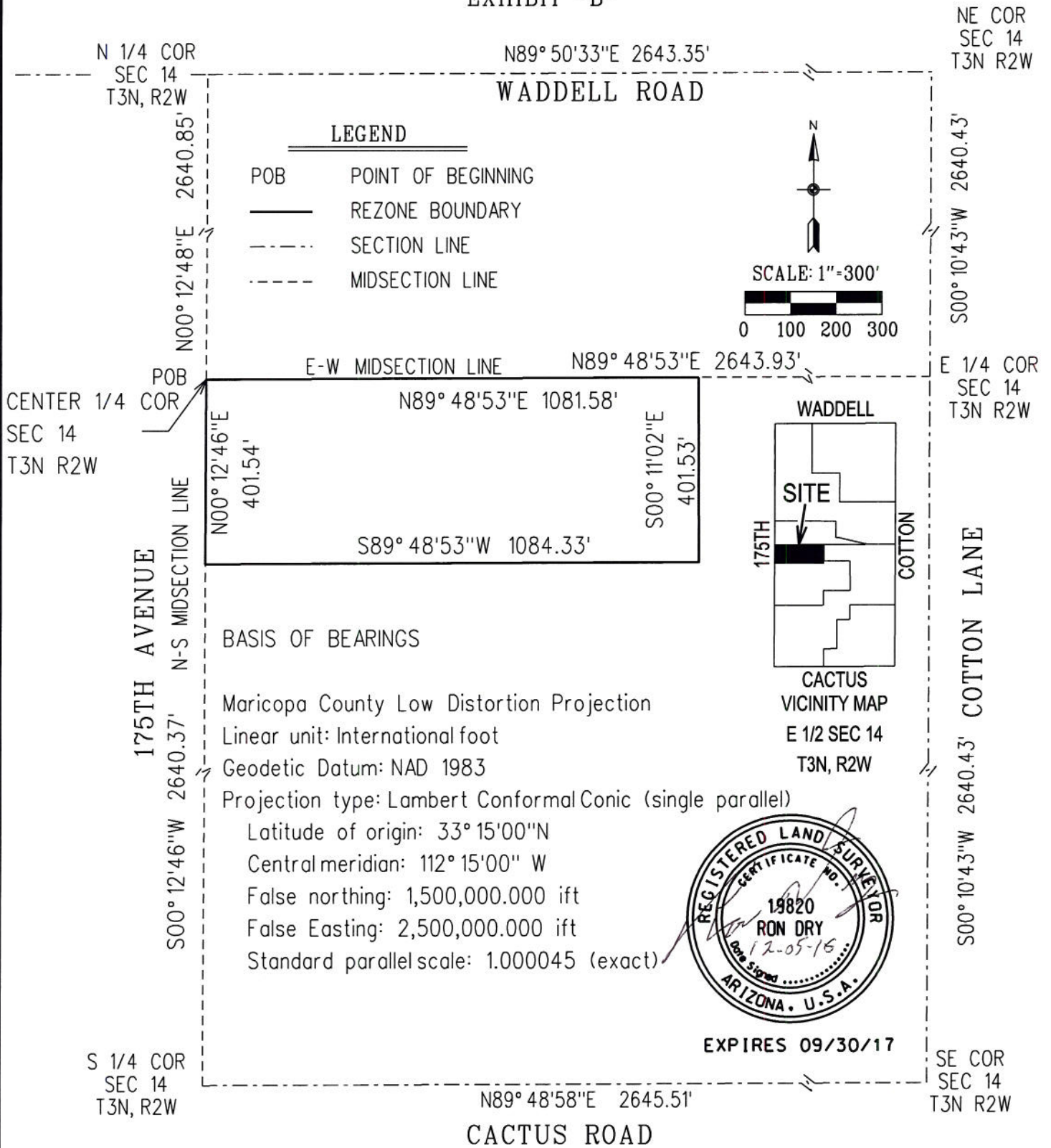
Attached is EXHIBIT "B" and by this reference is made a part hereof.

End of description



EXPIRES 09-30-2017

EXHIBIT "B"



175TH & SWEETWATER
 ZONE CHANGE
 from RR to RM-9 PUD



CITY OF SURPRISE
LAND SURVEY DEPARTMENT

PROJECT # 16034

DRAWN BY RCD

DATE 12-05-16

SHEET 1 OF 1

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: 175th & Sweetwater Rezone

OVERALL PUBLIC INVOLVEMENT LEVEL:

This activity will follow the citizen outreach and public hearing notification processes as outlined in state statute and the SUDC.

IDENTIFY STAKEHOLDERS:

Impacted residents; schools; churches; businesses; public at-large; property owners?

OBJECTIVES:

What is the purpose of the project/service/program and why is it needed? What are the impacts if the project/service/program is not achieved?

PUBLIC ENGAGEMENT STRATEGIES & TOOLS:

Public Engagement & Project timeline:

Public outreach time frame (when to when)

Future Council Work Session/Meetings target dates

Election dates (if applicable)

Project start/completion dates

Communication Tools and Technique options: (which do you plan to use?)

- ☐ Press releases
- ☐ Public meetings (video/photos, poster boards, fact sheet(s) *do you need Spanish version?)
- ☐ Presentations to boards and commissions, other interested community partners/stakeholders
- ☐ Third-party consultant/moderator (pending budget)
- ☐ Survey (online/paper/both?)
- ☐ Social media
- ☐ Surprise 11
- ☐ Notify Me email/ Council newsletters (opt-in audience)
- ☐ Paid advertising (pending budget)
- ☐ Surprise Progress (mailed quarterly and tied to print deadlines)
- ☐ Booth at city events
- ☐ Paid mailings (pending budget)
- ☐ Creation of a subcommittee/task force
- ☐ Youth/adult activities, registration, or orientation (HOA Academy)
- ☐ Website updates



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

Back Print

Council Meeting Date:	January 17, 2017	Contact Person:	ROBERT KUHFUSS - COMMUNITY DEVELOPMENT
Submitting Department:	CD	District:	3
Staff Recommendations:	Approve		

Consent	Regular	Public Hearing	x	Report/Discussion
---------	---------	----------------	---	-------------------

Agenda Wording:

Consideration and action pertaining to approval of the Preliminary Plat entitled, "Magnolia" dated November 28, 2016, an approximately 174 acre property generally located between Cotton Lane, 175th Avenue, Waddell Road, and Cactus Road.

Motion:

I move to approve the Preliminary Plat entitled, "Magnolia" dated November 28, 2016, subject to stipulations "a" through "h" as listed in the staff report.

Background:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of a 174-acre, 812-lot Preliminary Plat. This request follows a related annexation case being processed under case FS16-427 and is associated with a Zone Change (FS16-392) along with a companion Zone Change and Preliminary Plat being processed under FS16-391. Note: the subject request was continued at the December 15, 2016 Planning and Zoning Commission hearing to a date-certain of January 5, 2017. The results of that hearing are not known as of the writing of this report.

Objective Analysis:

The subject request involves a 174-acre, 812-lot Preliminary Plat in the proposed RM-6 PUD and RM-9 PUD zoning districts and anticipates four (4) lot product types, provides 45 acres of open space and implements the development standards, amenities, and other design features of the PUD Overlay. The Magnolia project is very well designed and is consistent with the General Plan and SUDC. The proposed development standards requested under the PUD Overlay are implemented in this Preliminary Plat and will allow the applicant to develop the site in a creative manner in keeping with the intent of the SUDC. Amenities included will provide recreational opportunities for the neighborhood residents.

Policy Compliant:

The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various Neighborhood types included within the character area. The

subject proposal contemplates up to 812 dwelling units, which equates to approximately 4.7 DU/Ac. As such the proposed zoning most closely aligns with the Suburban Neighborhood type and is consistent with the General Plan.

Financial Impact:

All activity related to ongoing development of the City of Surprise has an economic and fiscal impact on the city and the region.

Budget Impact:

There is no anticipated budget impact related to this item.

FTE Impact:

This item does not have an impact on current staff levels.

ATTACHMENTS:

Click to download

- ☐ [00 - FS16-392 Magnolia - Preliminary Plat - Staff Report](#)
 - ☐ [01 - FS16-392 Magnolia - Preliminary Plat - Vicintiy Map](#)
 - ☐ [02 - FS16-392 Magnolia - Preliminary Plat - Case Map](#)
 - ☐ [03 - FS16-392 Magnolia - Preliminary Plat](#)
 - ☐ [04a - FS16-392 Magnolia - Preliminary Plat - Landscape Plan](#)
 - ☐ [04b - FS16-392 Magnolia - Preliminary Plat - Landscape Plan](#)
 - ☐ [05 - FS16-392 Magnolia - Preliminary Plat - Luke AFB Comments](#)
 - ☐ [06 - FS16-392 Magnolia - Preliminary Plat - ADOT Comments](#)
 - ☐ [07 - FS16-392 Magnolia -Preliminary Plat - MWD Comments](#)
 - ☐ [08 - FS16-392 Magnolia - Preliminary Plat - Presentation](#)
-

PRELIMINARY PLAT

REPORT TO THE CITY COUNCIL

Case: **FS16-392**

Project Name: Magnolia Preliminary Plat

Council District: 3

Meeting Date: **January 17, 2017**

Planner: Robert H. Kuhfuss, AICP

Owner: S & S Cotton, LLC et. al.

Applicant: Mark Reddie of LVA Urban Design Studio on behalf of AZ Community Development, LLC

Request: Preliminary Plat

Site Location: Generally between Cotton Lane and 175th Avenue, Waddell Road to Cactus Road

Site Size: 174 acres (approx.)

Density: 4.7 DU/Ac

General Plan Conformance: The proposal is consistent with the Surprise General Plan 2035

Support/Opposition: None known

Staff Recommendation: **Approve**, subject to stipulations 'a' through 'h'

Commission Recommendation: Unknown as of the writing of this report

Introduction:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of five (5) separate requests relating to the proposed development in what is currently a county island located in the western portion of Surprise, near Sarah Ann Ranch. These five requests are listed below, with the subject request highlighted in **bold font**; however, this report should be read in the context of the other four requests.

Case FS16-391 – 175th & Sweetwater

- Zone Change from RR to RM-9 PUD
- Preliminary Plat

Case FS16-392 – Magnolia

- Rezone from RR to RM-6 PUD; from RR to RM-9 PUD; from RH PUD to RM-9 PUD; from RR to RH PUD with Flex Zone; from RR to CR PUD with Flex Zone and from RR to CR PUD.
- **Preliminary Plat**

Case FS16-427 – Annexation* **

Four of the five aforementioned requests will first be presented to the Planning and Zoning Commission, who will make a recommendation to the City Council. The first of the five requests involves the actual annexation of the property and will only be heard by the City Council. It is envisioned that all five requests will be presented to the City Council on January 17, 2017.

The following map depicts the county island status as currently existing and post-annexation.



* The annexation request was initially tied to FS16-391 and FS16-392; however, due to the differing land masses involved, the annexation was broken out from the other two cases and assigned its own case number.

** The blank petition relating to the proposed annexation was reviewed and heard by the City Council during a public hearing conducted on November 15, 2016 and is tentatively scheduled for final action by the City Council on January 17, 2017 together with the other related requests. Information regarding the proposed annexation is discussed under separate cover.

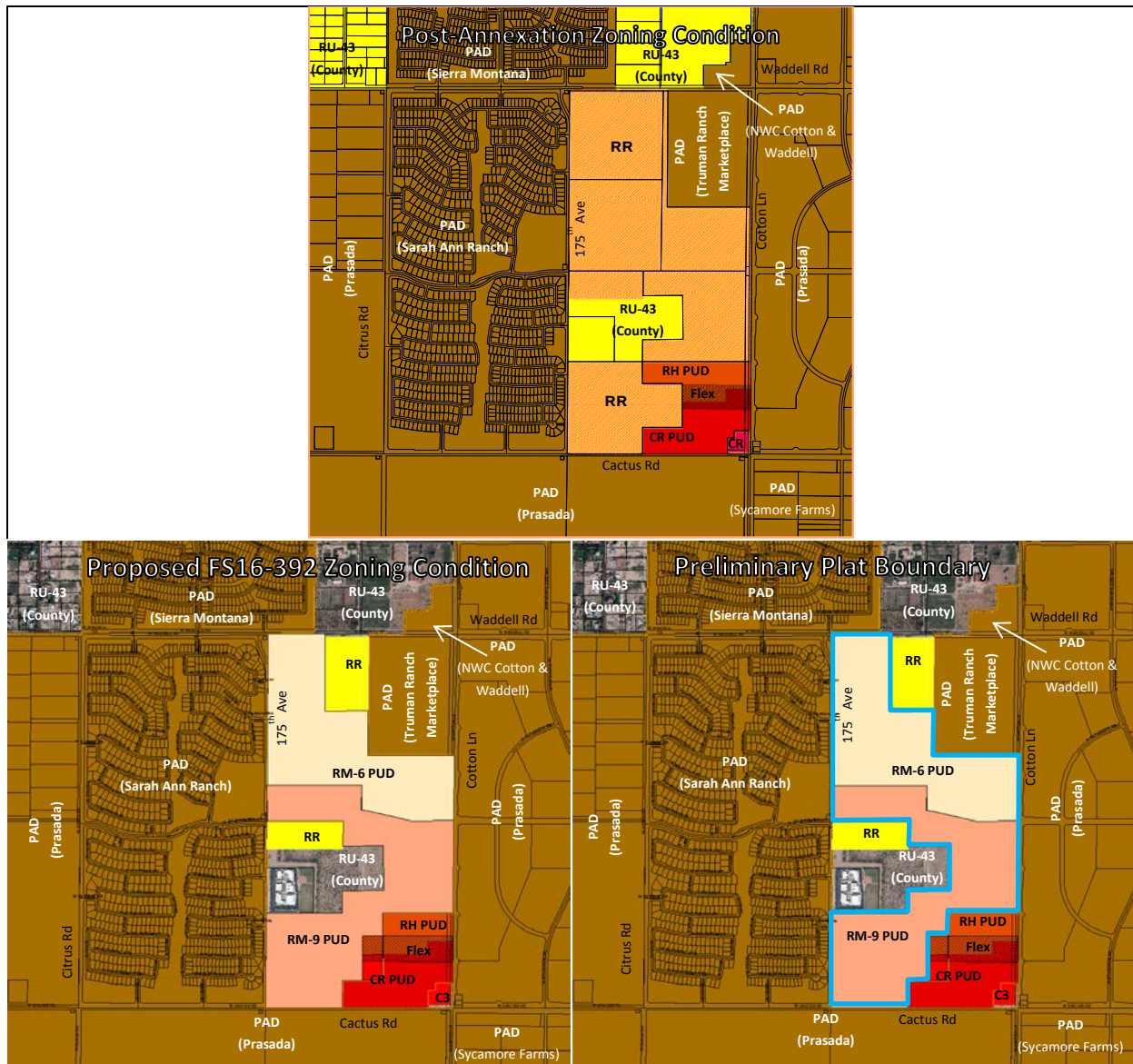
72 **Project Description:**

73
74 The subject request involves a 174-acre, 812-lot Preliminary Plat in the proposed RM-6 PUD and
75 RM-9 PUD zoning districts and anticipates the prior approval of the aforementioned annexation
76 case proposed under FS16-427, as well as the related zone change request under FS16-392. This
77 Preliminary Plat also anticipates the approval of the Preliminary Plat sought under case FS16-391
78 for the 175th & Sweetwater project as the two are interconnected as will be discussed later in this
79 report. This Preliminary Plat also anticipates four (4) lot product types, provides 45 acres of open
80 space and implements the development standards, amenities, and other design features of the
81 PUD Overlay. Note that the subject Preliminary Plat does not include the CR PUD, RH PUD, or Flex
82 Zones which are included as part of the companion zone change.

83
84 **Surrounding Land Zoning:**

85
86 The aforementioned annexation covers a large portion (approximately 203 acres) of the
87 unincorporated land located within the affected county island with the exception of any land
88 located north of Waddell Road as well as the Paradise Honors school campus. Similarly, the FS16-
89 392 zone change only encompasses a portion of the annexation area (approximately 181 acres),
90 while the subject Preliminary Plat only covers a portion of the zone change area (approximately 174
91 acres). The following three (3) maps depict the pre and post-annexation zoning condition, the
92 proposed zoning condition assuming the FS16-392 zone change is approved, and the subject
93 Preliminary Plat.

94
95 [See map set on following page.]



Background:

July 28, 2016: Staff met with the applicant to discuss the project during a regularly scheduled Concept Review meeting under CR16-305.

August 8, 2016: Staff met with the applicant to discuss annexation logistics.

August 23, 2016: Staff met with the applicant to discuss product design.

September 12, 2016: The applicant filed a request for a Zone Change and Preliminary Plat under case FS16-391. The applicant filed a second request for a companion Zone Change and Preliminary Plat under case FS16-392. The latter also included an annexation request.

September 28, 2016: On behalf of the applicant, staff opened case FS16-427 relating to the annexation of the subject property.

October 19, 2015: The applicant held a neighborhood outreach meeting to discuss the project.

October 31, 2016: Staff met with the applicant to discuss review comments.

November 8, 2016: The applicant filed their second submittal for the subject case.

November 15, 2016: The City Council approved the blank annexation petition relating to the annexation of the subject property as well as other proximal properties under case FS16-427.

December 1, 2016: Staff met with the applicant to discuss the Final Plat relating to the project during a regularly scheduled Concept Review meeting under CR16-511.

December 15, 2016: The Commission continued the case to a date-certain of January 5, 2017 due to an advertising error.

January 5, 2017: The Zone Change and Preliminary Plat requests being processed under FS16-391 and FS16-392 are scheduled for review by the Planning and Zoning Commission; however, the Commission's recommendation is unknown as of the writing of this report.

Citizen Outreach:

The site was posted in accordance with the SUDC and state statute. The City of Surprise also sent notices via First Class mail in accordance with the SUDC and state statute. The applicant held a citizen outreach meeting on October 19, 2016, which was well attended. While staff has received no items of opposition or support for the project, the applicant's Citizen Participation Final Report indicates one (1) member of the public offered positive feedback and two (2) members of the public offered negative feedback. The summary report also indicated that seven (7) people offered neutral comments and suggestions. The body of the summary report is included as an attachment to this report.

Analysis and Discussion:

Unlike typical "PAD" zoning, the subject request falls under the current SUDC. As such, the uses associated with each of the proposed zoning districts are per Section 122-43 of the SUDC. The PUD Overlay proposed under the companion case, however, will allow certain deviations from the development standards as specified in the SUDC. The following table as taken from the zoning narrative expresses the proposed residential development standards applicable to the site. Those items expressed in red font deviate from the base standard. Also of note are several footnotes which serve to clarify how certain development standards are to be applied.

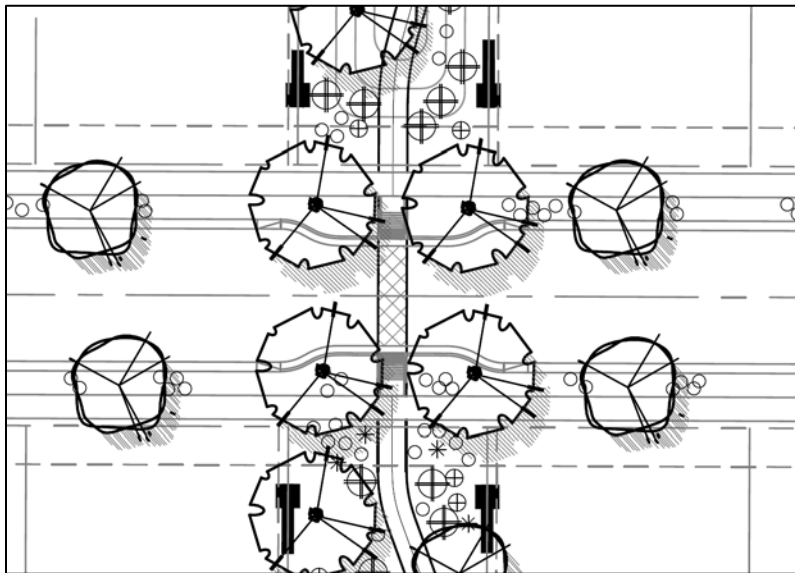
Table 1: RM-6 PUD and RM-9 PUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft)				
(1) (2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft)				
(3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft)				
(4)	20	15/20	20	13
Maximum Building Height (ft)				
(5)	35	35	35	35
Footnotes:				
(1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a PUE, in which case the minimum front setback for RM-9 shall be 10').				
(2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.				
(3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.				
(4) For RM-6 PUD, single-story minimum setback is 15', and two-story minimum setback is 20'.				
(5) For cluster product in the RM-9 PUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.				

The subject Preliminary Plat proposes four different lot products: 55' x 115' standard lots, 45' x 110' standard lots (both located within the RM-6 PUD zoning district), as well as alley loaded and cluster products (both located with the RM-9 PUD zoning district). The related zone change anticipates these lot products and includes PUD Overlays to amend the development standards accordingly. These lot products are illustrated on Sheet 5 of the Preliminary Plat along with the Development Standards table included in the zoning narrative. Staff notes that considerable effort went into creating the development standards that would meet the objectives of the applicant while addressing staff concerns over as parking, trash collection, fire access, and proximity to public utility easements. One discrepancy remains, however, regarding Sheet 18 of the Preliminary Plat which needs to be revised with respect to the R7-304 signage. A stipulation to that effect is included in staff's recommendation.

Sweetwater Avenue will bisect the site, with access to both Cotton Lane and 175th Avenue. The majority of Sweetwater Avenue is located within the Magnolia project; however, a small portion of that right-of-way located within the 175th & Sweetwater project discussed under separate cover. Since Sweetwater Avenue cohabitates both projects, it is essential that both Phase 1 of the Magnolia project be platted and developed concurrently with the 175th & Sweetwater project. As an alternative, Sweetwater Avenue could be implemented in its entirety through a Master Plat, a Map of Dedication or a combined Final Plat. Staff has included a stipulation to addresses this issue.

Staff considers the linear street/block design to be a desirable feature; however, the project is somewhat constrained by the adjacent properties that are not part of the development. As a result, some of the streets are longer than what the SUDC might allow. To mitigate this, certain traffic calming features are being implemented. These block lengths and traffic calming features are incorporated into the PUD Overlay and implemented in the Preliminary Plat. As an example, “chokers” are placed in strategic locations for the purpose of slowing traffic while not interfering with the ability of adjacent homeowner to park in front of their own homes. Further, the chokers reduce the effective paving width, thereby reducing the pedestrian crossing distance at those strategic locations, while not reducing the width of the travel lane making them compliant with Fire Department standards. The following image taken from Sheet L-2 of the Preliminary Landscape Plan illustrates this condition.



The Magnolia project provides approximately 45 acres of open space, which includes perimeter and end-block landscape tracts, co-use turf/retention areas, a dog park, interior trail corridors, and a highly amenitized Truman Community Center. Sweetwater Avenue will be flanked on either side by a substantial open space tract thereby enhancing the openness of the neighborhood. Similarly, 174th Avenue between Cactus Road and Larkspur Drive at the southern end of the project is configured using a modified residential cross-section, which includes a landscape median and edge treatments. In addition, well landscape drainage channels are located along the south and east borders of the project. Project amenities include tot-lots, ramadas, barbeques, and a trail system connecting each of the amenity areas via an open space spine, which was strategically positioned to enhance view corridors while reducing the number of adjacent lots.

The development will include certain wall and entry monument configurations, which will enhance the sense of place through the use of decorative wrought iron, medallions, faux stone and concrete caps. Figures 6 through 7A of the zoning narrative best illustrate the wall and monument configuration, although the same are illustrated on Sheet WD-1 of the subject Preliminary Landscape Plan. The locations of these wall and entry features are expressed on Sheets W-1 through W-3 of the Preliminary Landscape Plan.

The project will be well landscaped using a robust plant palette intended to enhance and reinforce the overall theme of the community. Most, but not all, of the plant species identified on the Preliminary Landscape Plan are included in the Arizona Department of Water Resources (ADWR) List of Drought Tolerant Plant Species. Several species listed on the Preliminary Landscape Plan, such as but not limited to the Magnolia tree, are not on the ADWR list; however, these plants will be used sparingly throughout the project. Staff notes that per the SUDC, only those plant species that are included in the ADWR list may be used within the public right-of-way. Further, the use of turf within the median of a public right-of-way is prohibited. The proposed landscape design meets these requirements.

Utility and Services Table:

Electric:	Arizona Public Service
Water:	EPCOR
Wastewater:	City of Surprise
Refuse:	City of Surprise
Natural Gas:	Southwest Gas
Irrigation:	Maricopa Water District
Schools:	Dysart USD

Conformance with Adopted Plans:

Surprise General Plan 2035: The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various Neighborhood types included within the character area. The subject proposal contemplates up to 812 dwelling units, which equates to approximately 4.7 DU/Ac. As such the proposed zoning most closely aligns with the Suburban Neighborhood type and is consistent with the General Plan.

Reviewing Agencies:

Luke Air Force Base (LAFB): In a letter dated October 3, 2015 (attached), LAFB indicated that the subject development met the Graduated Density Concept and would not interfere with flight operations. LAFB also requested a robust notification program.

Arizona Department of Transportation (ADOT): In an email dated September 20, 2016 (attached), ADOT indicated the proposed development would not affect any ADOT highway facilities.

Maricopa Water District (MWD): In a memo dated October 19, 2016 (attached), MWD indicated the property covered by this application is subject to certain MWD interests including existing facilities and other property interests. MWD requires that prior to Final Plat approval, certain comments must be addressed.

Surprise GIS: City of Surprise GIS requires certain revisions relating to the AutoCAD files for the project. Staff has included a stipulation to address this issue.

Summary:

The Magnolia project is very well designed and is consistent with the General Plan and SUDC as amended by the PUD Overlay. The proposed development standards requested under the PUD Overlay will allow the applicant to develop the site in a creative manner in keeping with the intent of the SUDC and satisfying staff concerns. Amenities included will provide recreational opportunities for the neighborhood residents.

Findings:

- The proposed Preliminary Plat is consistent with the zone change proposed under case FS16-392.
- The proposed development standards will allow the property to be reasonably developed.

Recommendation:

Based on the findings noted above, staff recommends the Commission move to recommend **approval** of the subject Preliminary Plat request to the City Council, subject to stipulations 'a' through 'h' as outlined below:

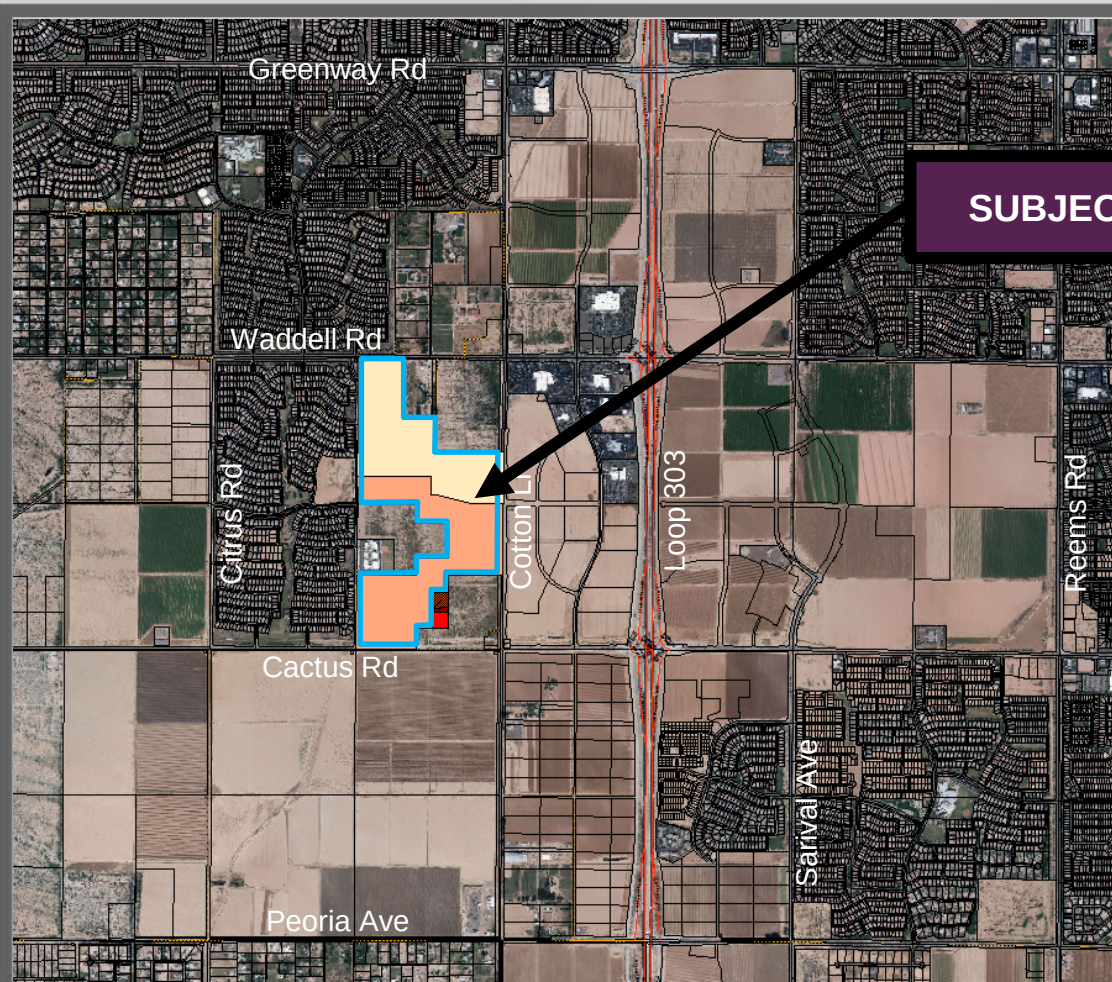
- a. Development of the site shall be in substantial conformance with the Preliminary Plat entitled "Magnolia", prepared by David Evans and Associates, dated revised November 2016 and stamped received November 28, 2016, except as modified by the following stipulations.
- b. Landscaping of the development shall be consistent with the Preliminary Landscape Plan entitled "Magnolia", Prepared by LVA Urban Design Studio, dated revised November 2016 and stamped received November 28, 2016, except as modified by the following stipulations.

- c. Final Platting of Phase I of the Magnolia development shall occur concurrently with the Final Platting of the 175th & Sweetwater development contemplated under FS16-391, unless an alternative methodology is approved by the City of Surprise with respect to the Sweetwater Avenue right-of-way.
- d. Prior to Final Plat approval, the applicant shall obtain approval from the Maricopa Water District with respect to the development's effect on MWD facilities.
- e. Within 30 days of approval of the subject Preliminary Plat by the City Council, the applicant shall submit a revised Sheet 18 of the Preliminary Plat Plan such to include arrows on the R7-304 signs.
- f. Within 30 days of approval of the subject Preliminary Plat by the City Council, the applicant shall submit revised AutoCAD drawings in accordance with City of Surprise GIS standards.
- g. Approval of this Preliminary Plat request presumes the approval of the rezone proposed under FS16-392. Should said rezone request fail, the subject Preliminary Plat granted under the subject approval is null and void.
- h. Non-compliance with the stipulations of approval of this case will be treated as a violation in accordance with the provisions of Article XIV of the Surprise Unified Development Code.

However, should the Commission wish to recommend denial of the request, the Commission should make its own findings and base its decision on those alternative findings.

Attachments:

- 01 Vicinity Map (1 page)
- 02 Case Map (1 page)
- 03 Preliminary Plat (20 pages)
- 04 Preliminary Landscape Plan (16 pages)
- 05 Luke AFB comments (2 pages)
- 06 ADOT comments (1 page)
- 07 MWD comments (1 page)



Greenway Rd

Waddell Rd

Citrus Rd

Cotton Rd

Loop 303

Reems Rd

Cactus Rd

Peoria Ave

Sarval Ave

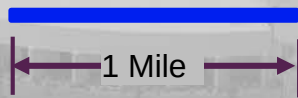
SUBJECT SITE

**FS16-392
Magnolia
Preliminary Plat**

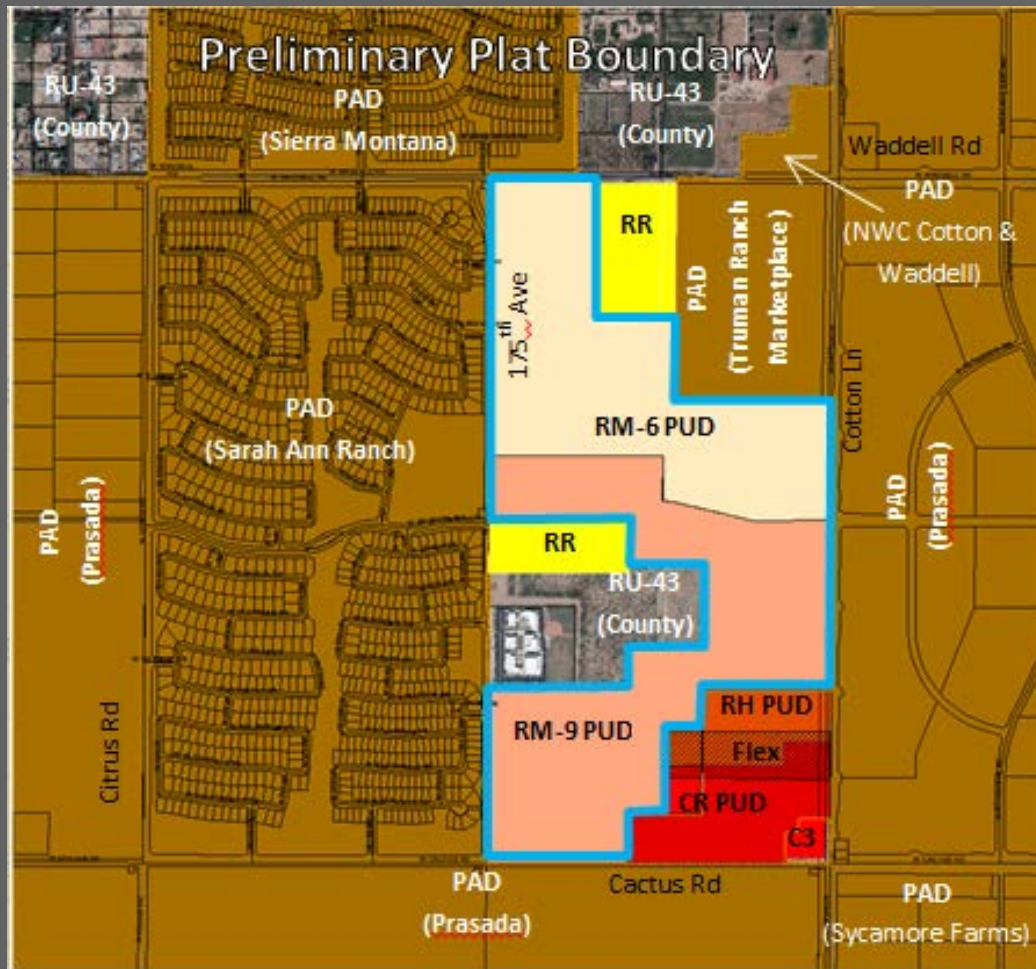
Vicinity Map



North

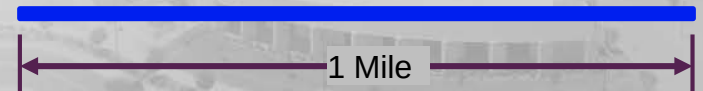


1 Mile



FS16-392 Magnolia Preliminary Plat

Case Map



LEGAL DESCRIPTION

THAT PORTION OF THE NORTHEAST QUARTER AND THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA DESCRIBED AS FOLLOWS:

COMMENCING AT A BRASS CAP FOUND AT THE SOUTHEAST CORNER OF SAID SECTION 14, FROM WHICH A BRASS CAP FOUND AT THE SOUTH QUARTER CORNER OF SAID SECTION 14 BEARS SOUTH 89°48'58" WEST, 2,645.51 FEET;

THENCE ALONG THE SOUTH LINE OF SAID SOUTHEAST QUARTER, SOUTH 89°48'58" WEST, 1,556.27 FEET TO A POINT THAT LIES 1,089.24 FEET EASTERLY OF THE SOUTH QUARTER CORNER OF SAID SECTION 14; THENCE NORTH 00°11'02" WEST, 33.00 FEET TO A POINT ON THE NORTH LINE OF THAT 33.0 FOOT WIDE DEDICATED RIGHT OF WAY DESCRIBED IN DOCUMENT NO. 2016-0134602, RECORDS OF MARICOPA COUNTY, ARIZONA, SAID POINT BEING THE POINT OF BEGINNING;

THENCE ALONG THE NORTH LINE OF SAID DEDICATED RIGHT OF WAY, SOUTH 89°48'58" WEST, 1,089.01 FEET TO A POINT ON THE WEST LINE OF SAID SOUTHEAST QUARTER;

THENCE ALONG THE WEST LINE OF SAID SOUTHEAST QUARTER, NORTH 00°12'46" EAST, 1,299.63 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN DOCUMENT NO. 2010-0916813 RECORDS OF MARICOPA COUNTY, ARIZONA;

THENCE ALONG THE SOUTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2010-0916813 AND DOCUMENT NO. 2015-0888709, BOTH IN RECORDS OF MARICOPA COUNTY, ARIZONA, NORTH 89°48'58" EAST, 1,077.57 FEET, TO THE MOST SOUTHERLY SOUTHEAST CORNER OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-0888709;

THENCE ALONG THE EASTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-0888709, NORTH 00°11'02" WEST, 316.90 FEET;

THENCE CONTINUING ALONG THE EASTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-0888709, NORTH 89°48'58" EAST, 584.03 FEET;

THENCE CONTINUING ALONG THE EASTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-0888709, NORTH 00°11'02" WEST, 633.80 FEET TO THE NORTHEAST CORNER OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-0888709;

THENCE ALONG THE NORTHERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-0888709, SOUTH 89°48'58" WEST, 570.97 FEET TO A POINT ON THE WEST LINE OF THAT REAL PROPERTY DESCRIBED AS PARCEL NO. 2 IN DOCUMENT NO. 2009-1021524, RECORDS OF MARICOPA COUNTY, ARIZONA;

THENCE ALONG THE WESTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2009-1021524, NORTH 00°11'02" WEST, 357.04 FEET TO A POINT ON THE NORTH LINE OF THE SOUTHEAST QUARTER OF SAID SECTION 14;

THENCE ALONG THE NORTH LINE OF THE SOUTHEAST QUARTER OF SAID SECTION 14, SOUTH 89°48'53" WEST, 1081.58 FEET TO AN ALUMINUM CAP, MARKED "KLEIN RLS 42137" FOUND AT THE CENTER OF SAID SECTION 14;

THENCE ALONG THE WEST LINE OF SAID NORTHEAST QUARTER, NORTH 00°12'48" EAST, 2,607.85 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 33.0 FEET OF SAID NORTHEAST QUARTER;

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 810.02 FEET TO A POINT ON THE EAST LINE OF THE WEST 810.0 FEET OF SAID NORTHEAST QUARTER;

THENCE ALONG SAID EAST LINE, SOUTH 00°12'48" WEST, 1,050.02 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1083.0 FEET OF SAID NORTHEAST QUARTER;

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 611.78 FEET TO A POINT ON THE EAST LINE OF THE WEST 100.0 FEET OF THE EAST HALF OF SAID NORTHEAST QUARTER;

THENCE ALONG LAST SAID EAST LINE, SOUTH 00°12'26" WEST, 633.00 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1715.99 FEET OF SAID NORTHEAST QUARTER;

THENCE ALONG LAST SAID SOUTH LINE, NORTH 89°50'33" EAST, 1,188.86 FEET TO A POINT ON THE WEST LINE OF THE EAST 33.0 FEET OF SAID SECTION 14;

THENCE ALONG LAST SAID WEST LINE, SOUTH 00°12'04" WEST, 923.34 FEET;

THENCE CONTINUING ALONG LAST SAID WEST LINE, SOUTH 00°10'43" WEST, 1,308.02 FEET TO A POINT ON THE NORTH LINE OF THE SOUTH 1332.60 FEET OF THE SOUTHEAST QUARTER OF SAID SECTION 14;

THENCE ALONG LAST SAID NORTH LINE, SOUTH 89°48'58" WEST, 958.17 FEET;

THENCE SOUTH 00°11'02" EAST, 316.90 FEET;

THENCE SOUTH 89°48'58" WEST, 287.98 FEET;

THENCE SOUTH 00°11'02" EAST, 633.80 FEET;

THENCE SOUTH 89°48'58" WEST, 285.54 FEET;

THENCE SOUTH 00°11'02" EAST, 348.90 FEET TO THE POINT OF BEGINNING.

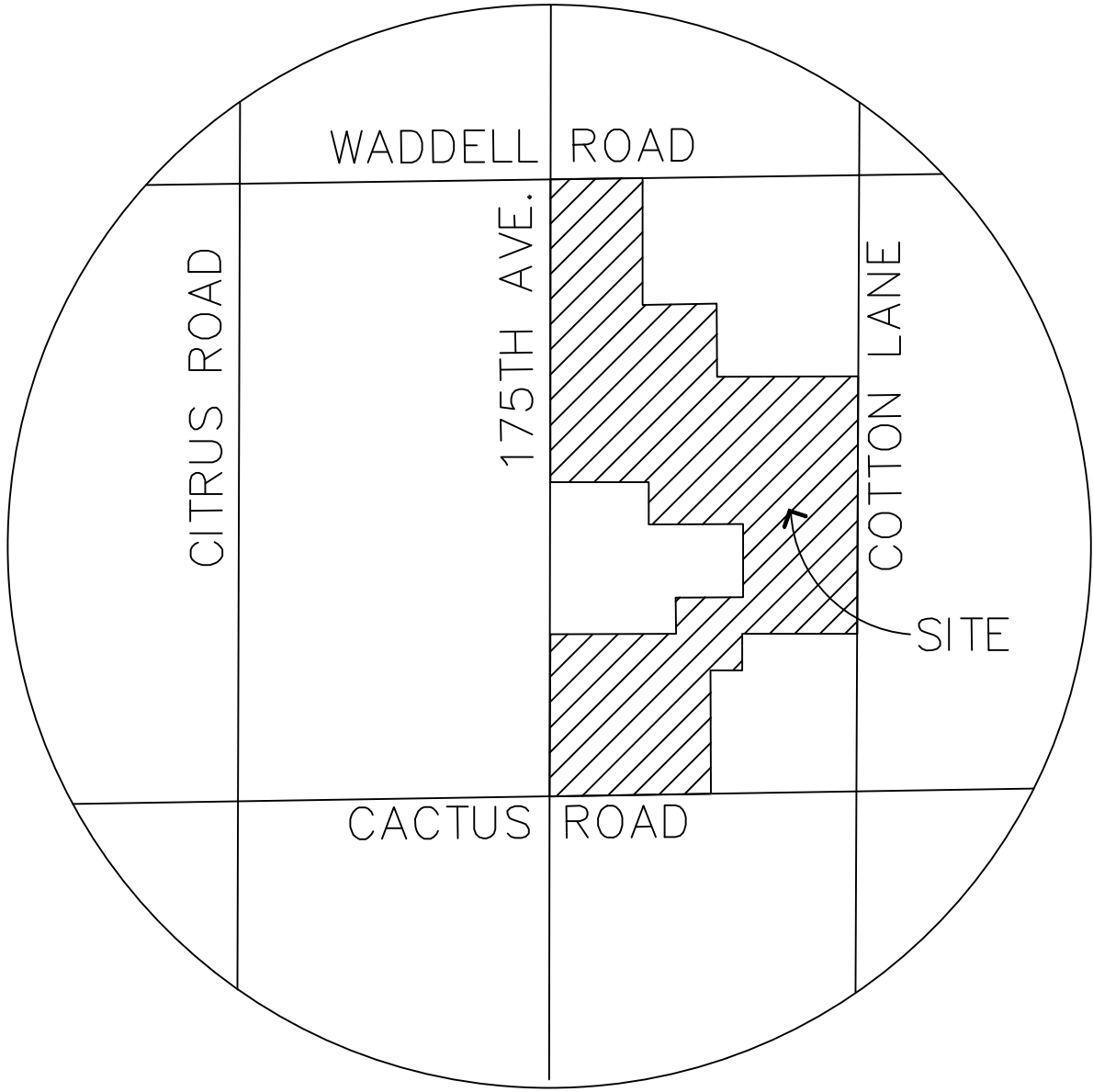
SAID PARCEL CONTAINING 7,572,398 SQUARE FEET OR 173.838 ACRES, MORE OR LESS.

MAGNOLIA
PRELIMINARY PLAT
SURPRISE, ARIZONA

A PORTION OF THE EAST HALF OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA & SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA

SITE DATA

EXISTING ZONING:	RM-6 PUD & RM-9 PUD
GROSS AREA:	173.8 AC (RM-6: 78.6 AC RM-9: 95.2 AC)
NET AREA:	157.4 (RM-6: 74.3 AC RM-9: 83.1 AC)
LOT COUNT:	812 LOTS
DENSITY:	5.2
OPEN SPACE AREA:	45.2 AC



VICINITY MAP

SECTION 14, T3N, R2W
NTS

FLOOD ZONE CERTIFICATION

THIS IS TO CERTIFY THAT A PORTION OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE ZONE "A" FLOOD HAZARD AREA AS DEPICTED ON THE PLAT OF SURVEY AND THAT THE REMAINDER OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE SHADED ZONE "X" FLOOD HAZARD AREA PER FIRM MAP PANEL NUMBER 04013C1660L DATED OCTOBER 16, 2013, AS PUBLISHED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA). THE FLOOD ZONE BOUNDARY IS LOCATED BY SCALED MAP LOCATION AND GRAPHIC PLOTTING ONLY.

ZONE "A" AS DEFINED BY FEMA IS:
SPECIAL FLOOD HAZARD AREAS INUNDATED BY THE 1% ANNUAL CHANCE FLOOD, NO BASE FLOOD ELEVATIONS DETERMINED.

SHADED ZONE "X" AS DEFINED BY FEMA IS:
AREAS OF 0.2% ANNUAL CHANCE FLOOD; AREAS OF 1% ANNUAL CHANCE FLOOD WITH AVERAGE DEPTHS OF LESS THAN 1 FOOT OR WITH DRAINAGE AREAS LESS THAN 1 SQUARE MILE; AND AREAS PROTECTED BY LEVEES FROM 1% ANNUAL CHANCE FLOOD.

DEVELOPER

SURPRISE VILLAGE PARTNERS, LLC
11024 N. 28TH DRIVE, SUITE 170
PHOENIX, 85029

PHONE: (602) 499-0899
CONTACT: JOSEPH KALISH

PLANNER

LVA URBAN DESIGN STUDIO
120 SOUTH ASH AVENUE
TEMPE, ARIZONA 85281
CONTACT: MARK REDDIE
PHONE: (480) 994-0994

ENGINEER

DAVID EVANS AND ASSOCIATES, INC.
4600 EAST WASHINGTON STREET, SUITE 250
PHOENIX, ARIZONA 85034
PHONE: (602) 678-5151
FAX: (602) 678-5155
CONTACT: RAMZI GEORGES, PE
e-mail: ryg@deainc.com

SHEET INDEX

- 1.....COVER SHEET/KEY MAP
- 2-5.....DETAILS AND CROSS SECTIONS
- 6-14.....PRELIMINARY PLAT
- 15-17.....SIGNING AND MARKING PLANS
- 18-20.....SOLID WASTE COLLECTION ROUTE

BASIS OF BEARING

SOUTH 89°48'58" WEST, THE MEASURED BEARING BETWEEN A FOUND CITY OF SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND COTTON LANE AND A FOUND CITY OF SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND 175TH AVENUE, AS SHOWN HEREON, UTILIZING THE LEICA SMARTNET GPS NETWORK.

RELATIVE TO MARICOPA COUNTY, ARIZONA LOW DISTORTION PROJECTION

LINEAR UNIT: INTERNATIONAL FEET
GEODETIC DATUM: NAD 1983
PROJECTION TYPE: LAMBERT CONFORMAL CONIC
(SINGLE PARALLEL)

LATITUDE OF ORIGIN: 33°15'00" N
CENTRAL MERIDIAN: 112°15'00" W
FALSE NORTHING: 1,500,000.000 ift
FALSE EASTING: 2,500,000.000 ift
STANDARD PARALLEL SCALE: 1.000045 (EXACT)

BENCHMARK

2 INCH CITY OF SURPRISE BRASS DISK WITH RAISED DATUM POINT - MARKED CITY OF SURPRISE BENCHMARK COT1 2009.7 - LOCATED ON TOP OF DRAINAGE SCUPPER APPROXIMATELY 700 FEET NORTH OF THE INTERSECTION OF CACTUS ROAD AND COTTON LANE ON THE EAST SIDE OF COTTON LANE.

ELEVATION 1248.65 NORTH AMERICAN VERTICAL DATUM 1988 (NAVD88)

LEGEND

- CENTERLINE
- RIGHT OF WAY
- PROPERTY LINE
- EASEMENT
- E ELECTRICAL
- G GAS
- SANITARY SEWER
- T TELEPHONE
- W WATER
- OHE OVERHEAD ELECTRIC
- FLOW LINE
- IRR IRRIGATION LINE
- PUE
- VNAE
- STORM DRAIN
- SEWER MANHOLE
- SEWER CLEANOUT
- EXISTING ELEVATION CONTOUR
- FLOW ARROW
- SIGN
- WATER VALVE
- FIRE HYDRANT
- GRADE BREAK
- MATCH LINE
- PARCEL LINE
- FLOODPLAIN LIMITS



PROJECT MANAGER: RAMZI GEORGES, P.E.				
DESIGNED BY: .	DRAWN BY: .	CHECKED BY: RYG	DATE: 11/2016	
 DAVID EVANS AND ASSOCIATES INC. 4600 E Washington Street, Suite 250 Phoenix, Arizona 85034 Phone: 602/678-5151				
				
EXPIRES: 3/31/2017				
PRELIMINARY PLAT FOR MAGNOLIA CITY OF SURPRISE, ARIZONA				
ANNEXATION CASE #: FS16-427 ZONING CASE #: FS16-392				
SECTION: 14 TWNISP: 3N RANGE: 2W				
JOB NO.: AZCD0002				
SHEET 1 OF 20				

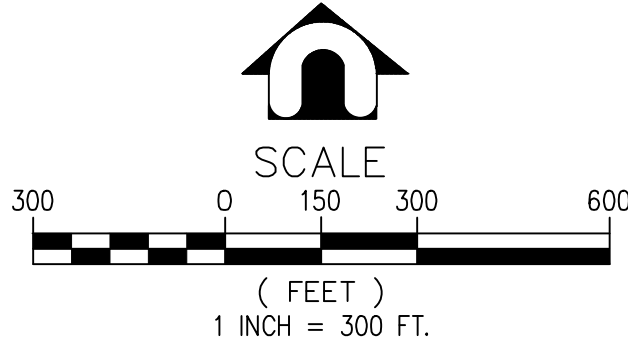
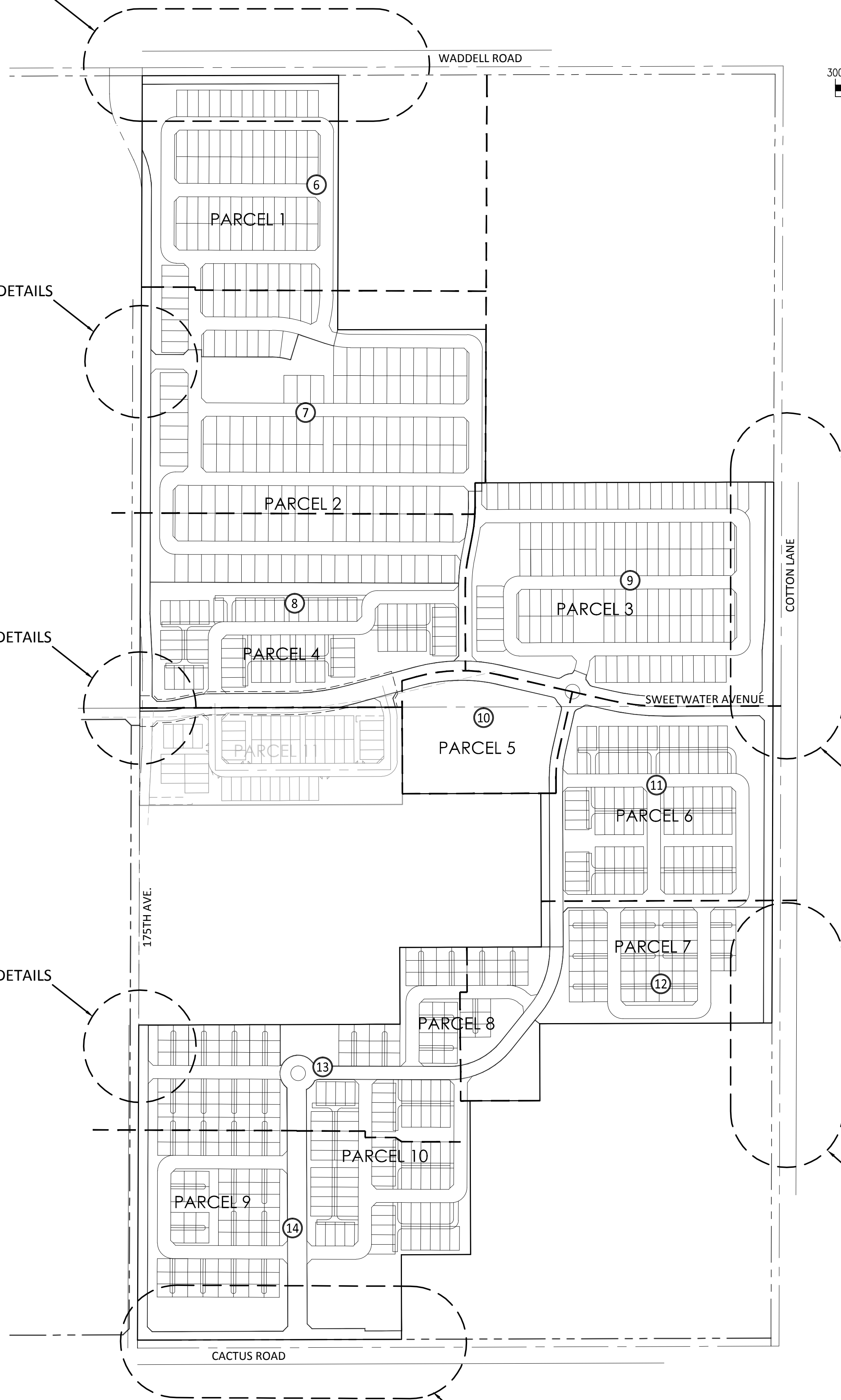
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SEE SHEET 17
FOR STRIPING DETAILS

SEE SHEET 15
FOR STRIPING DETAILS

SEE SHEET 15
FOR STRIPING DETAILS

SEE SHEET 15
FOR STRIPING DETAILS



SEE SHEET 16
FOR TRANSITION/STRIPING
DETAILS

SEE SHEET 16
FOR TRANSITION/STRIPING
DETAILS

SEE SHEET 17
FOR TRANSITION



SHEET INDEX
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

SECTION: 14
TWNHP: 3N
RANGE: 2W

JOB NO.:
AZCD0002

SHEET
2 OF 20



EXPIRES: 3/31/2017

**DAVID EVANS
AND ASSOCIATES INC.**
4800 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
DATE: 11/2016

PROJECT MANAGER: RAMZI GEORGES, P.E.

PARCEL 1

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
2-AA	0.035	OPEN SPACE AND COMMUNITY AMENITIES
2-BB	0.035	OPEN SPACE AND COMMUNITY AMENITIES
2-CC	2.666	OPEN SPACE, DRAINAGE, SEWER EASEMENT, AND COMMUNITY AMENITIES
2-II	0.017	OPEN SPACE AND COMMUNITY AMENITIES
2-W	0.035	OPEN SPACE AND COMMUNITY AMENITIES
2-X	0.166	OPEN SPACE AND COMMUNITY AMENITIES
2-Y	0.035	OPEN SPACE AND COMMUNITY AMENITIES
2-Z	0.035	OPEN SPACE AND COMMUNITY AMENITIES
TOTAL	3.024	

PARCEL 2

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
2-EE	0.519	OPEN SPACE, WATER EASEMENT, SEWER EASEMENT
2-GG	0.145	OPEN SPACE, DRAINAGE, MULTIUSE TRAIL, AND COMMUNITY AMENITIES
2-HH	0.047	OPEN SPACE AND COMMUNITY AMENITIES
2-N	1.083	OPEN SPACE, DRAINAGE, ALLEY EASEMENT, AND COMMUNITY AMENITIES
2-O	0.036	OPEN SPACE AND COMMUNITY AMENITIES
2-P	0.537	OPEN SPACE, DRAINAGE, MULTI-USE TRAIL, AND COMMUNITY AMENITIES
2-Q	0.451	OPEN SPACE, DRAINAGE, AND COMMUNITY AMENITIES
2-R	0.036	OPEN SPACE AND COMMUNITY AMENITIES
2-S	0.221	OPEN SPACE, MULTIUSE TRAIL, AND COMMUNITY AMENITIES
2-T	0.036	OPEN SPACE AND COMMUNITY AMENITIES
2-U	0.036	OPEN SPACE AND COMMUNITY AMENITIES
2-V	2.194	OPEN SPACE, DRAINAGE, AND COMMUNITY AMENITIES
TOTAL	5.341	

PARCEL 3

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
1-C	2.319	OPEN SPACE, DRAINAGE EASEMENT, AND COMMUNITY AMENITIES
1-D	0.035	OPEN SPACE AND COMMUNITY AMENITIES
1-E	0.638	OPEN SPACE, MULTI-USE TRAIL, DRAINAGE, AND COMMUNITY AMENITIES
1-F	0.035	OPEN SPACE AND COMMUNITY AMENITIES
1-G	1.785	OPEN SPACE, DRAINAGE, MULTI-USE TRAIL, AND COMMUNITY AMENITIES
1-H	0.035	OPEN SPACE AND COMMUNITY AMENITIES
1-I	0.158	OPEN SPACE, MULTI-USE TRAIL, SEWER EASEMENT AND COMMUNITY AMENITIES
1-J	0.049	OPEN SPACE, MULTI-USE TRAIL AND COMMUNITY AMENITIES
TOTAL	5.054	

PARCEL 4

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
2-FF	2.701	OPEN SPACE, DRAINAGE, ALLEY EASEMENT, SIDEWALK EASEMENT, MULTIUSE TRAIL, AND COMMUNITY AMENITIES
2-M	1.981	OPEN SPACE, DRAINAGE, ALLEY EASEMENT, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
TOTAL	4.682	

PARCEL 5

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
1-A	6.922	OPEN SPACE, DRAINAGE, PUBLIC TRAIL EASEMENT, RECREATION AND COMMUNITY AMENITIES
TOTAL	6.922	

PARCEL 6

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
1-B	2.883	OPEN SPACE, DRAINAGE EASEMENT, ALLEY EASEMENT, SIDEWALK EASEMENT, SEWER EASEMENT, AND COMMUNITY AMENITIES
1-K	0.994	OPEN SPACE, DRAINAGE, ALLEY EASEMENT, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
1-L	0.616	OPEN SPACE, MULTI-USE TRAIL, DRAINAGE, AND COMMUNITY AMENITIES
TOTAL	4.493	

PARCEL 7

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
1-M	0.066	OPEN SPACE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
1-N	0.100	OPEN SPACE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
1-O	2.936	OPEN SPACE, DRAINAGE, ALLEY EASEMENT, SIDEWALK EASEMENT, SEWER EASEMENT, WATER EASEMENT, AND COMMUNITY AMENITIES
TOTAL	3.102	

PARCEL 8

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
2-A	0.354	OPEN SPACE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2-B	0.857	OPEN SPACE, DRAINAGE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2-C	0.292	OPEN SPACE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2-D	0.847	OPEN SPACE, DRAINAGE AND COMMUNITY AMENITIES
TOTAL	2.350	

PARCEL 9

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
2-E	0.148	OPEN SPACE AND COMMUNITY AMENITIES
2-F	0.196	OPEN SPACE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2-I	2.851	OPEN SPACE, PUBLIC TRAIL EASEMENT, DRAINAGE EASEMENT, SEWER EASEMENT, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2-K	0.508	OPEN SPACE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2-L	0.223	OPEN SPACE, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
TOTAL	3.926	

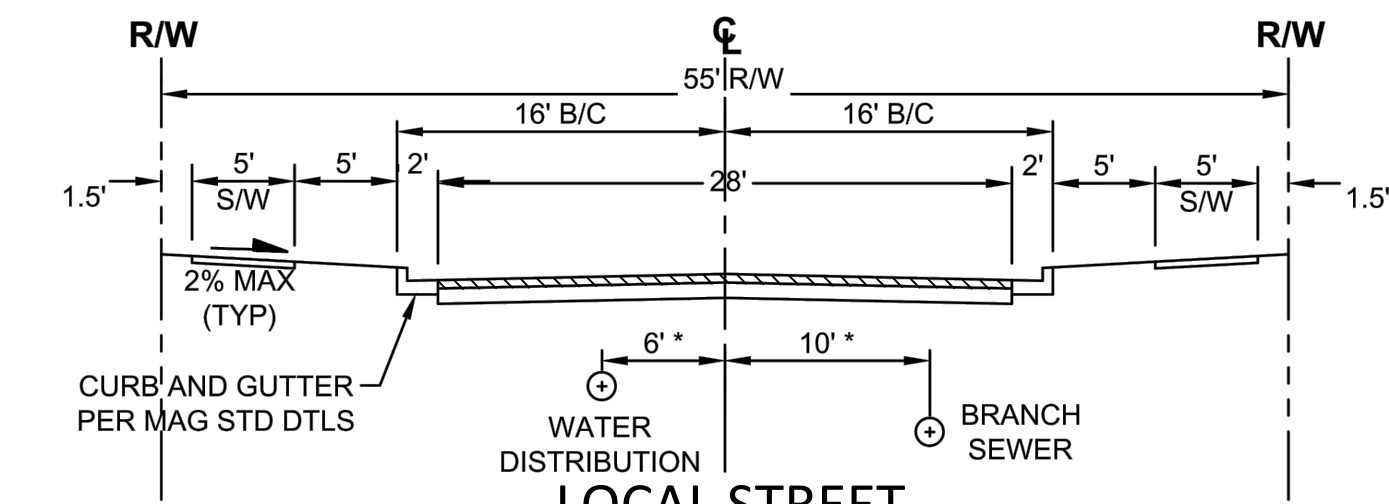
PARCEL 10

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE / DEDICATION
2—G	0.810	OPEN SPACE, ALLEY EASEMENT, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2—H	0.791	OPEN SPACE, ALLEY EASEMENT, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
2—J	4.688	OPEN SPACE, DRAINAGE EASEMENT, ALLEY EASEMENT, SIDEWALK EASEMENT, AND COMMUNITY AMENITIES
TOTAL	6.289	

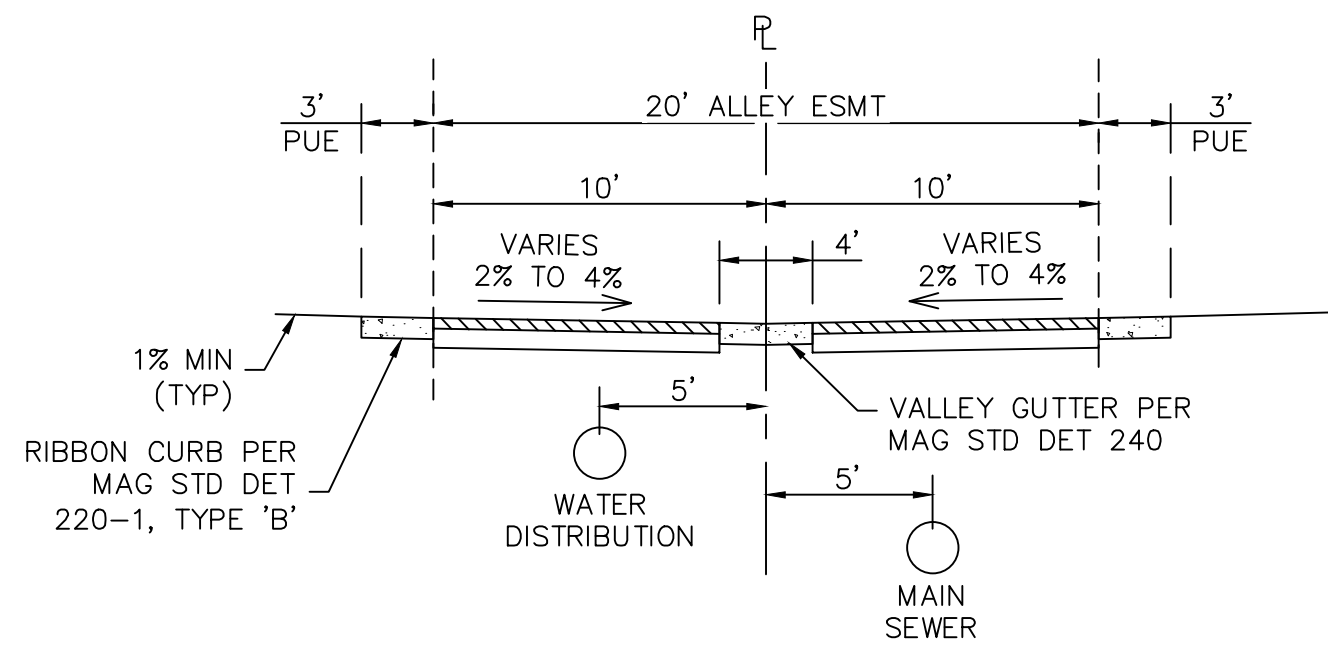
NOTE:
INDIVIDUAL LOT TABLES TO BE PROVIDED
ON FINAL PLAT.



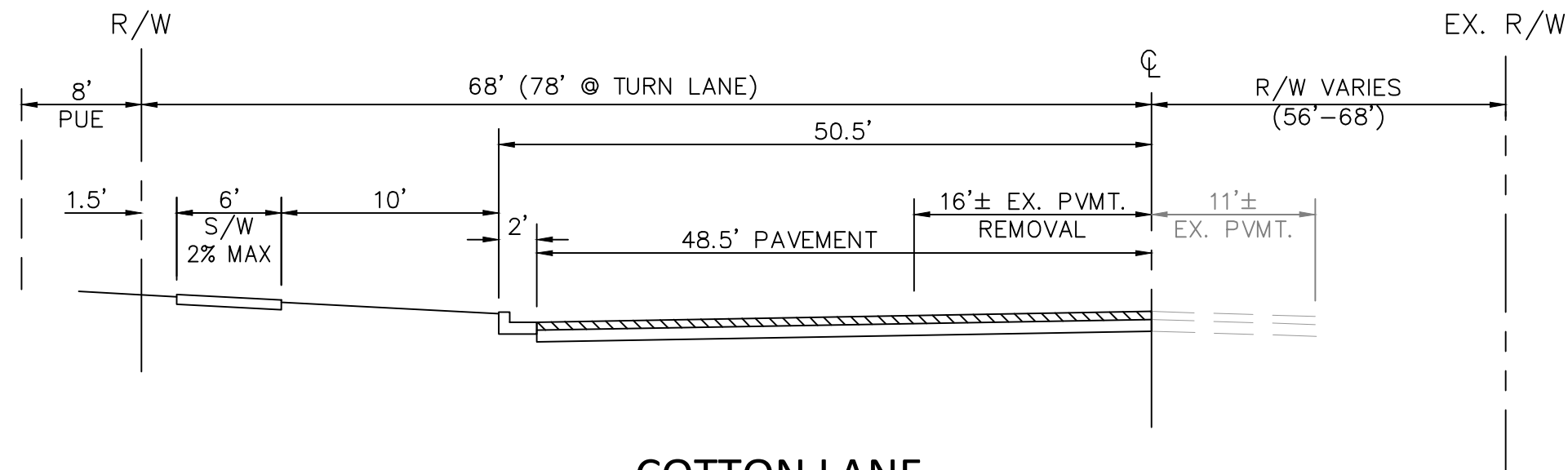
TRACT DATA TABLES FOR MAGNOLIA CITY OF SURPRISE, ARIZONA		 EXPIRES: 3/31/2017		DAVID EVANS AND ASSOCIATES INC. 4800 E Washington Street, Suite 250 Phoenix Arizona 85034 Phone: 602.678.5151		DESIGNED BY: .. DRAWN BY: .. CHECKED BY: RYG DATE: 11/2016		PROJECT MANAGER: _____ RAMZI GEORGES, P.E.	
SECTION: 14 TWNSHIP: 3N RANGE: 2W		JOB NO.: AZCD0002		3 SHEET OF 20					



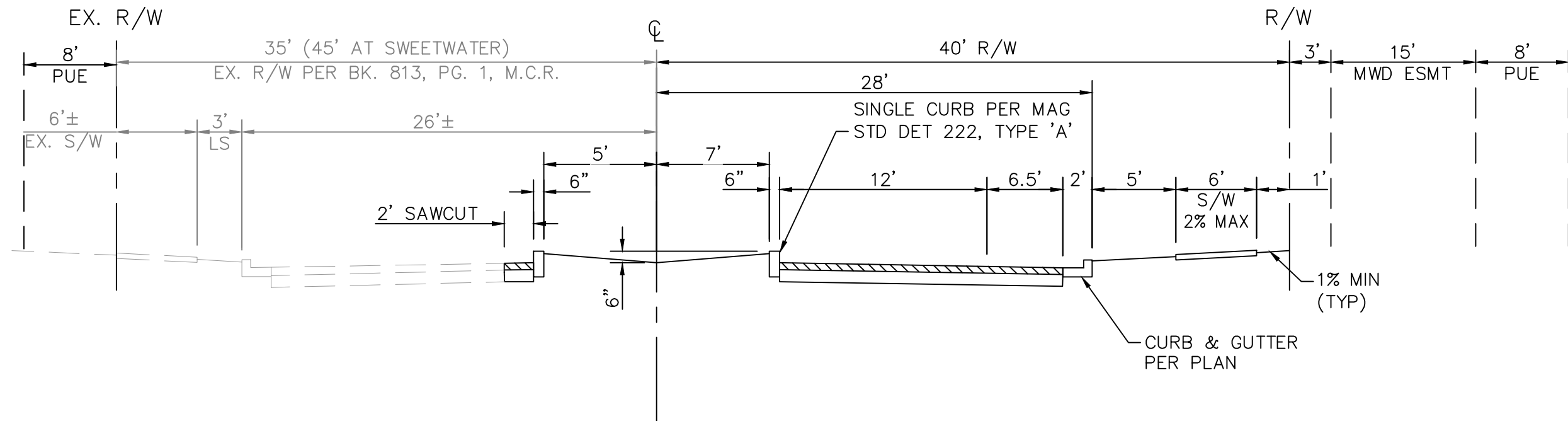
LOOKING NORTH / EAST
(GEORGIA DR., WILLOW AVE., VOLTAIRE ST., EUGENE TR., ALEXANDRIA WY., ANDORA ST., PERSHING ST., VALENTINE ST., SURREY DR., WOOD DR., DREYFUS ST., DAHLIA DR., WINDROSE DR., CORRINE DR., LARKSPUR DR., COLUMBINE DR., BLOOMFIELD RD., CHARTER OAK RD., 171ST LN., 171ST DR., 172ND AVE., 172ND DR., 172ND LN., 173RD LN., 174TH AVE., 174TH LN., 174TH DR.)



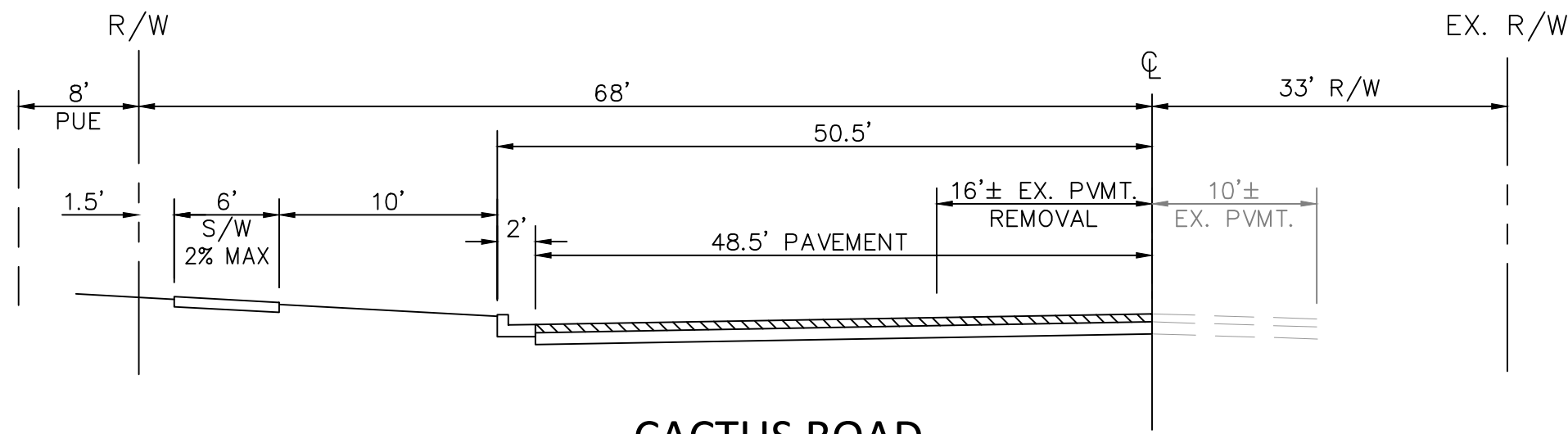
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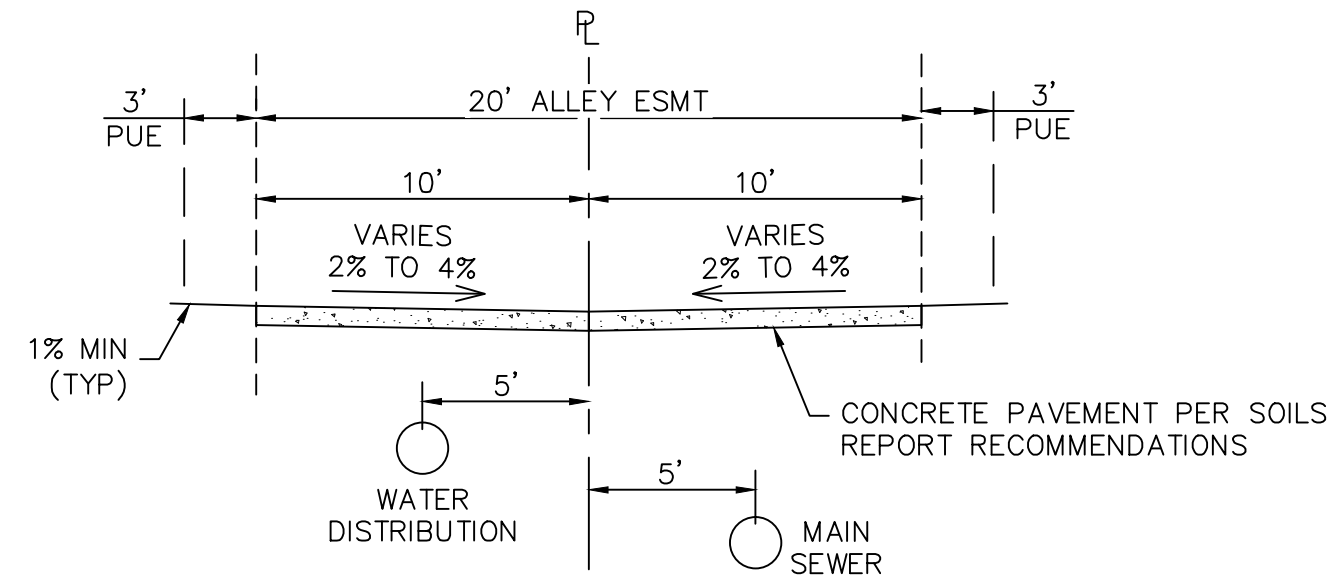
LOOKING NORTH



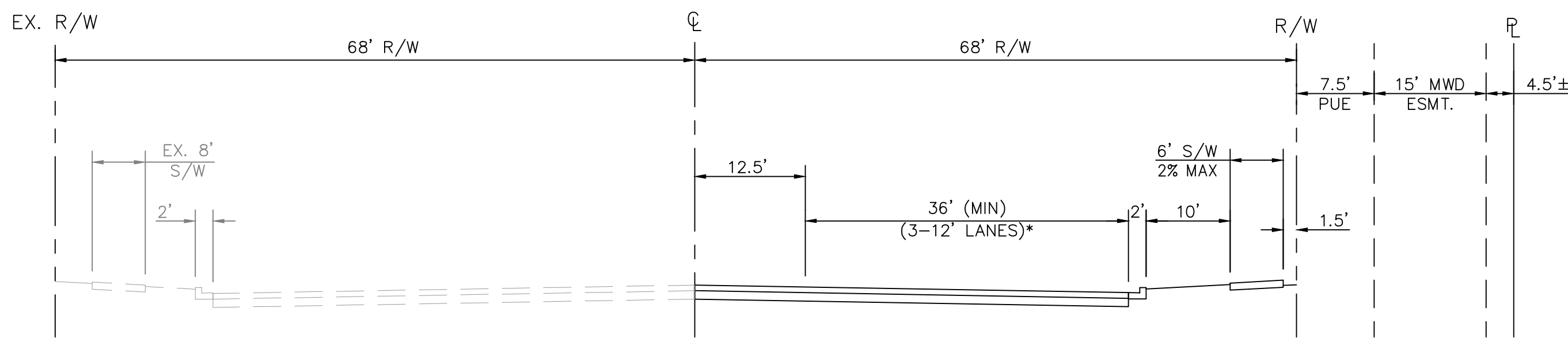
LOOKING NORTH



LOOKING EAST

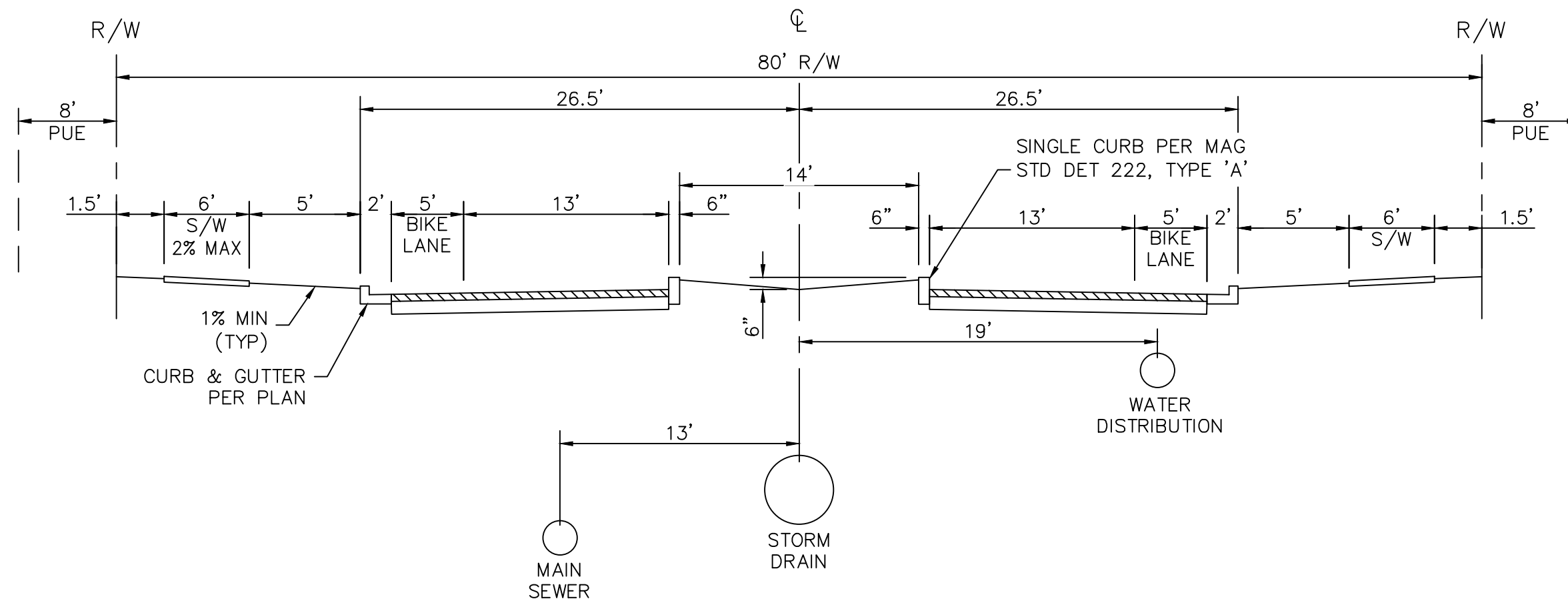


LOOKING NORTH / EAST

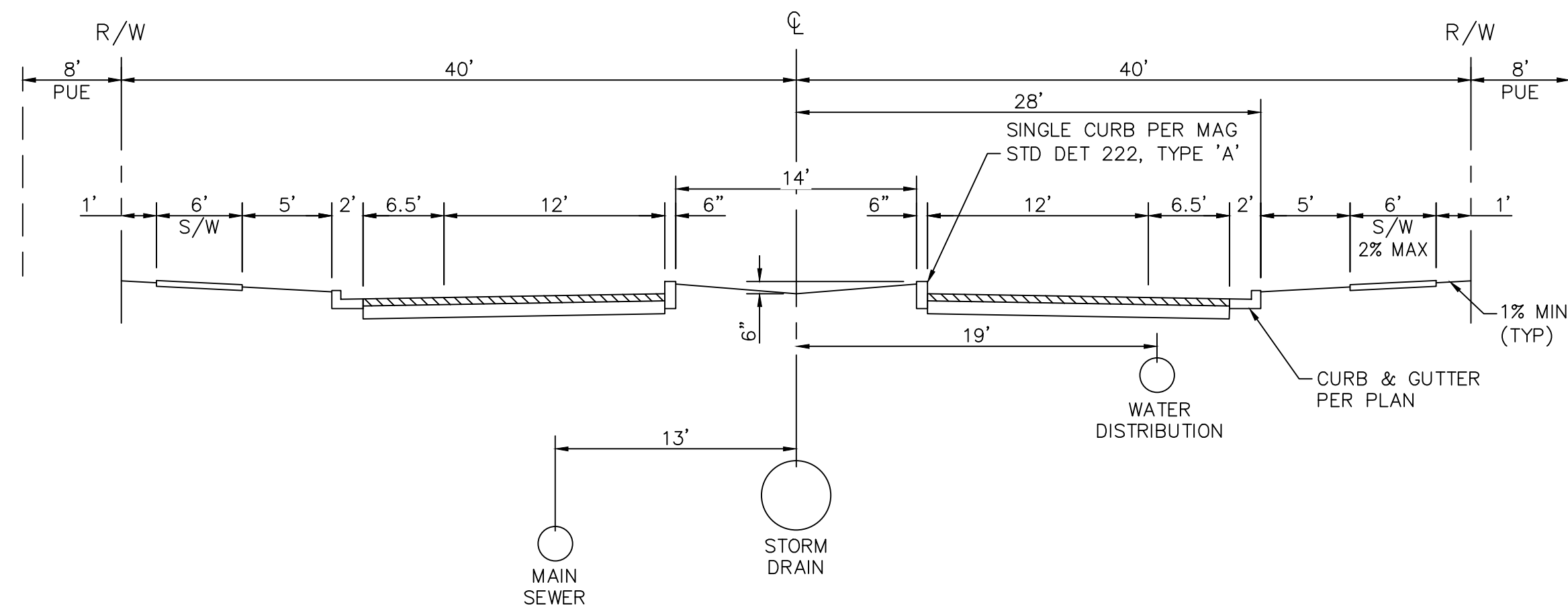


LOOKING EAST

*NOTE:
THIS SECTION REPRESENTS THE ULTIMATE BUILDOUT CONDITION OF WADDELL ROAD. INTERIM LANE STRIPING IS TO BE PER STRIPING PLANS.



LOOKING NORTH



LOOKING EAST

PROJECT MANAGER:	RAMZI GEORGES, P.E.
DESIGNED BY:	
DRAWN BY:	
CHECKED BY:	RYG
DATE:	11/2016

DAVID EVANS AND ASSOCIATES INC.
4600 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.878.5151

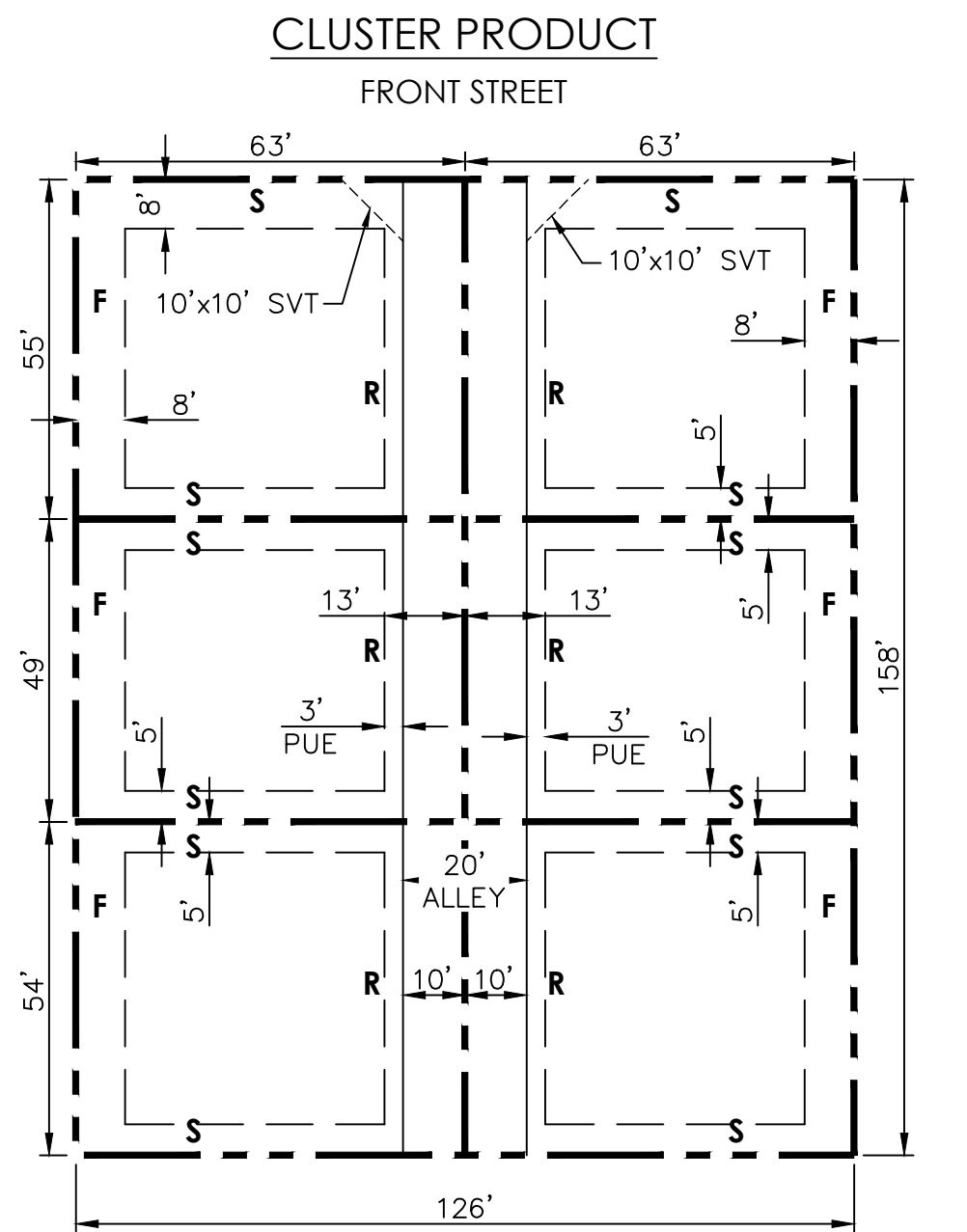


STREET SECTIONS
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

SECTION: 14
TWSHP: 3N
RANGE: 2W
JOB NO.:
AZCD0002
SHEET
4 OF 20

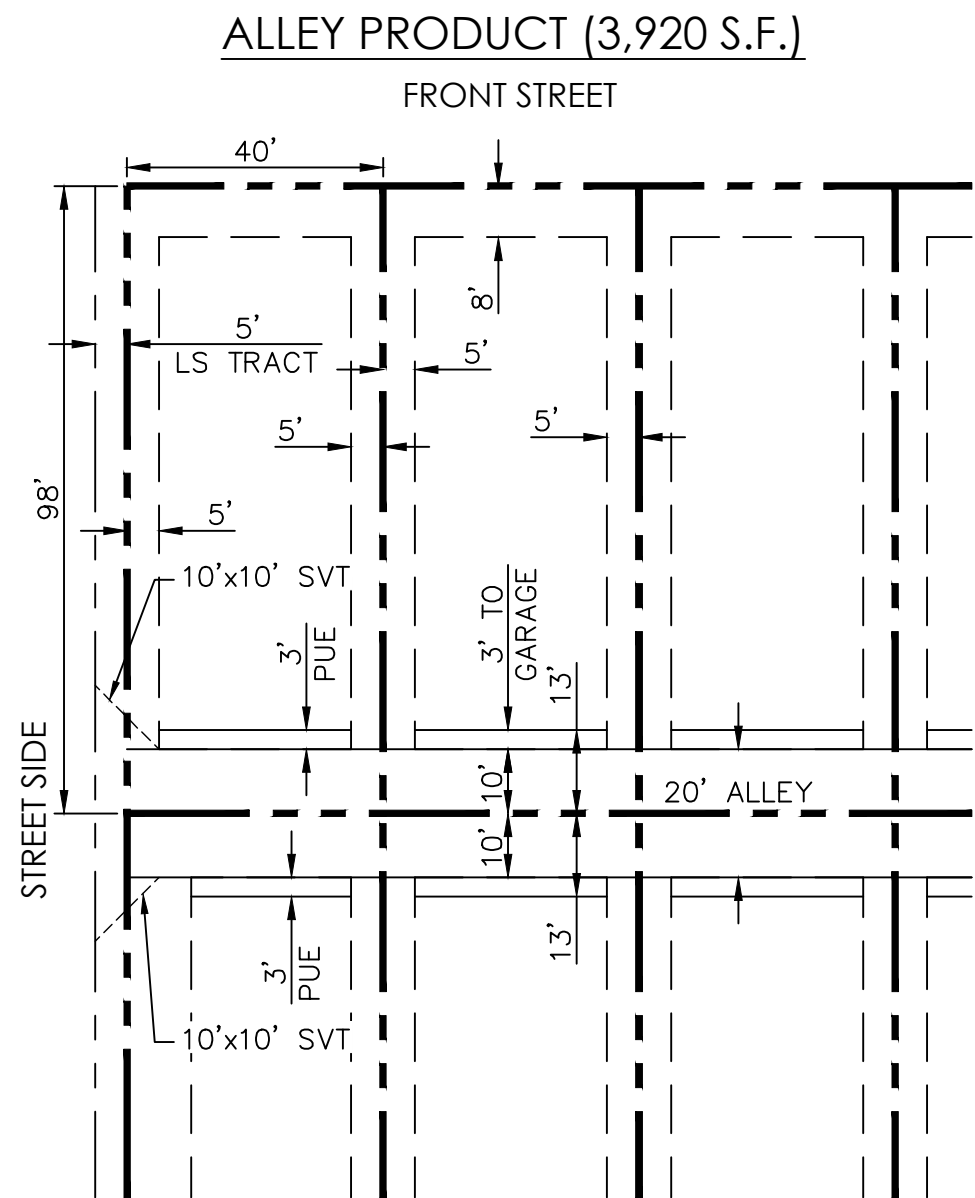


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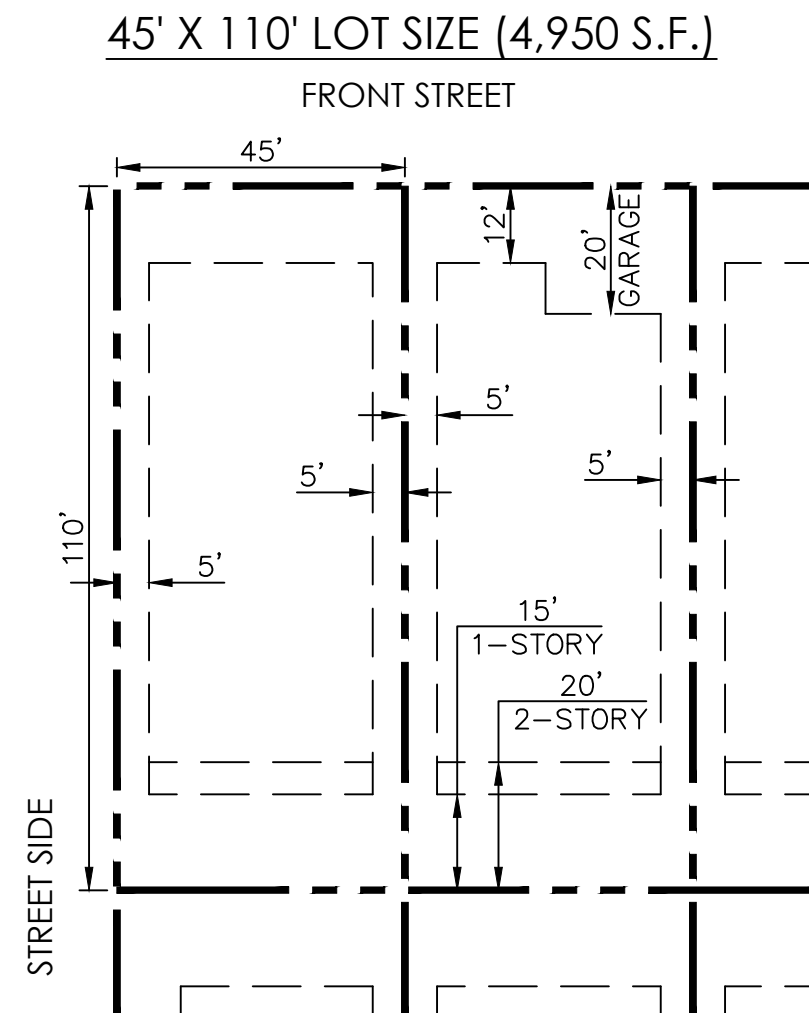


F = FRONT YARD
R = REAR YARD
S = SIDE YARD

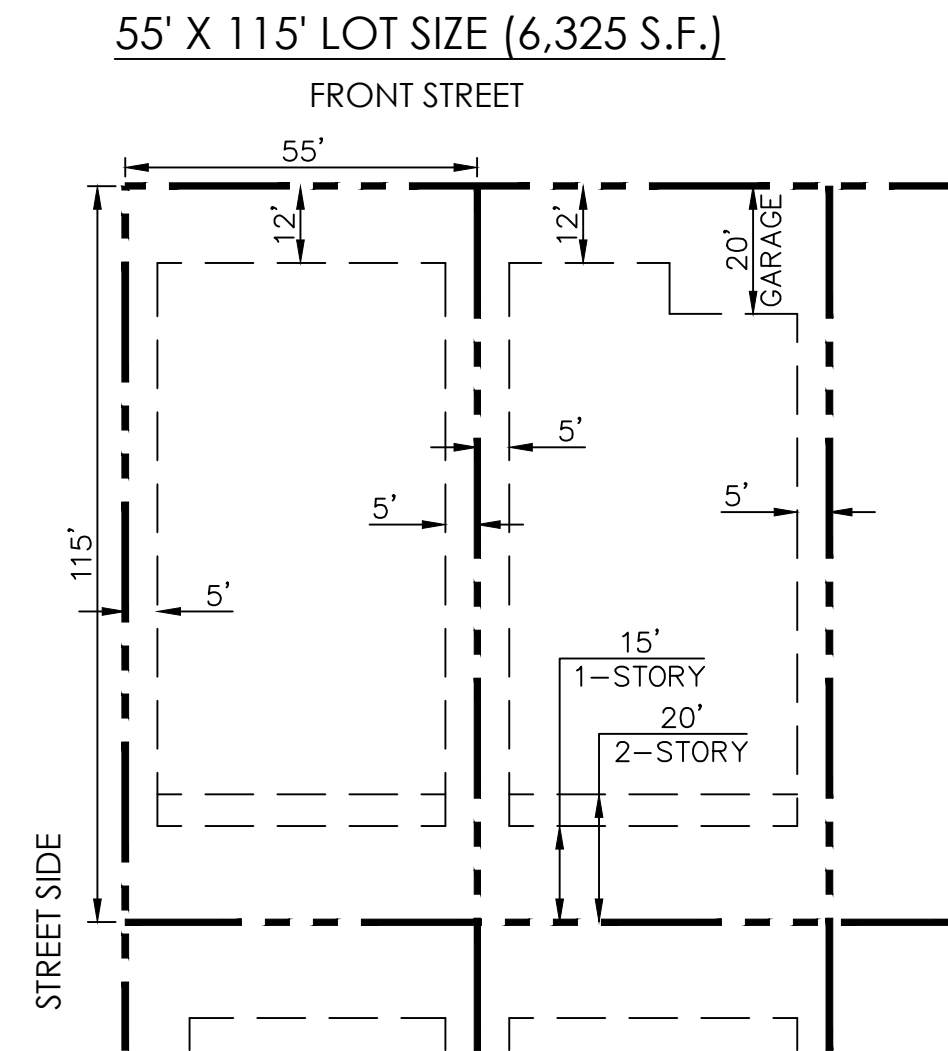
FRONT: 8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE: 5'
STREET SIDE: 8' (10' WHERE ADJACENT TO AN 8' PUE)
REAR: (ALLEY) 13'



FRONT: 8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE: 5'
REAR: (ALLEY) 13'



FRONT: 12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR: 20'
SIDE: 5'
REAR: 15' (1-STORY)
20' (2-STORY)



FRONT: 12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR: 20'
SIDE: 5'
REAR: 15' (1-STORY)
20' (2-STORY)

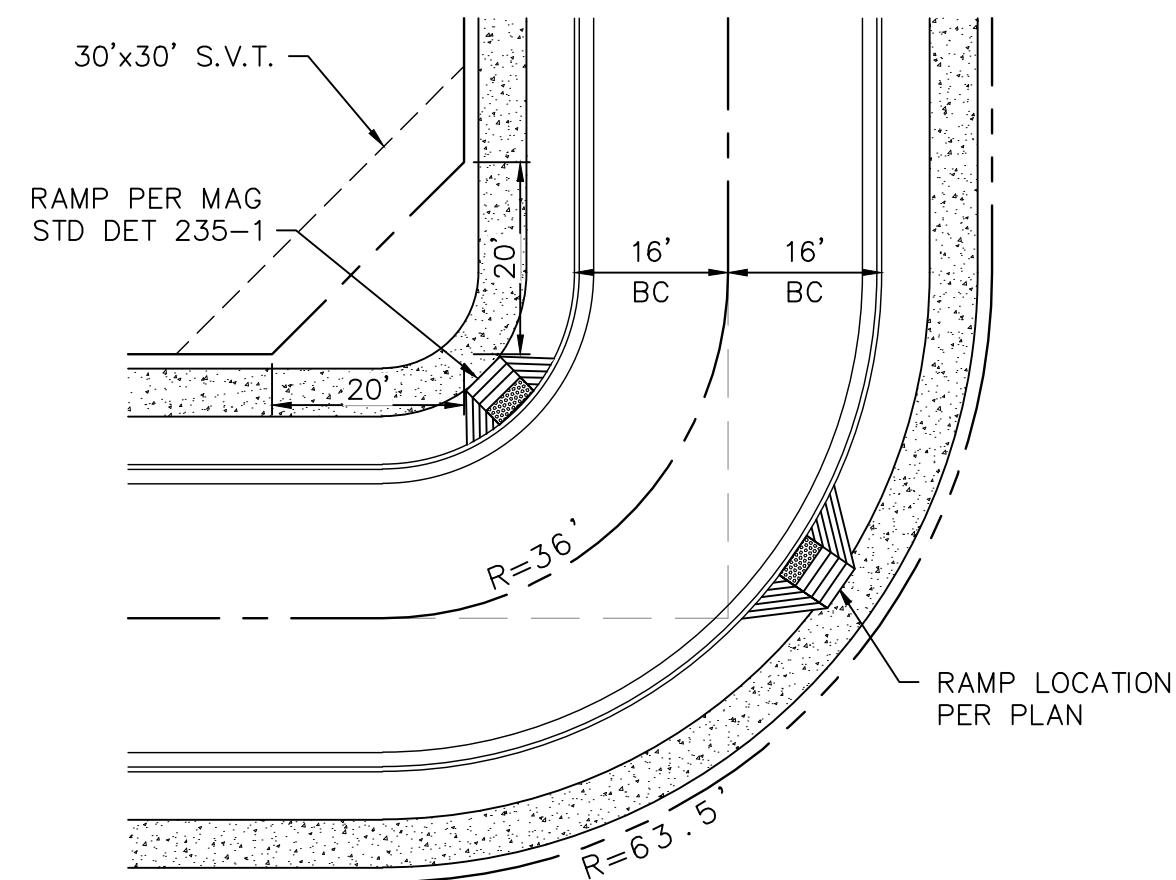
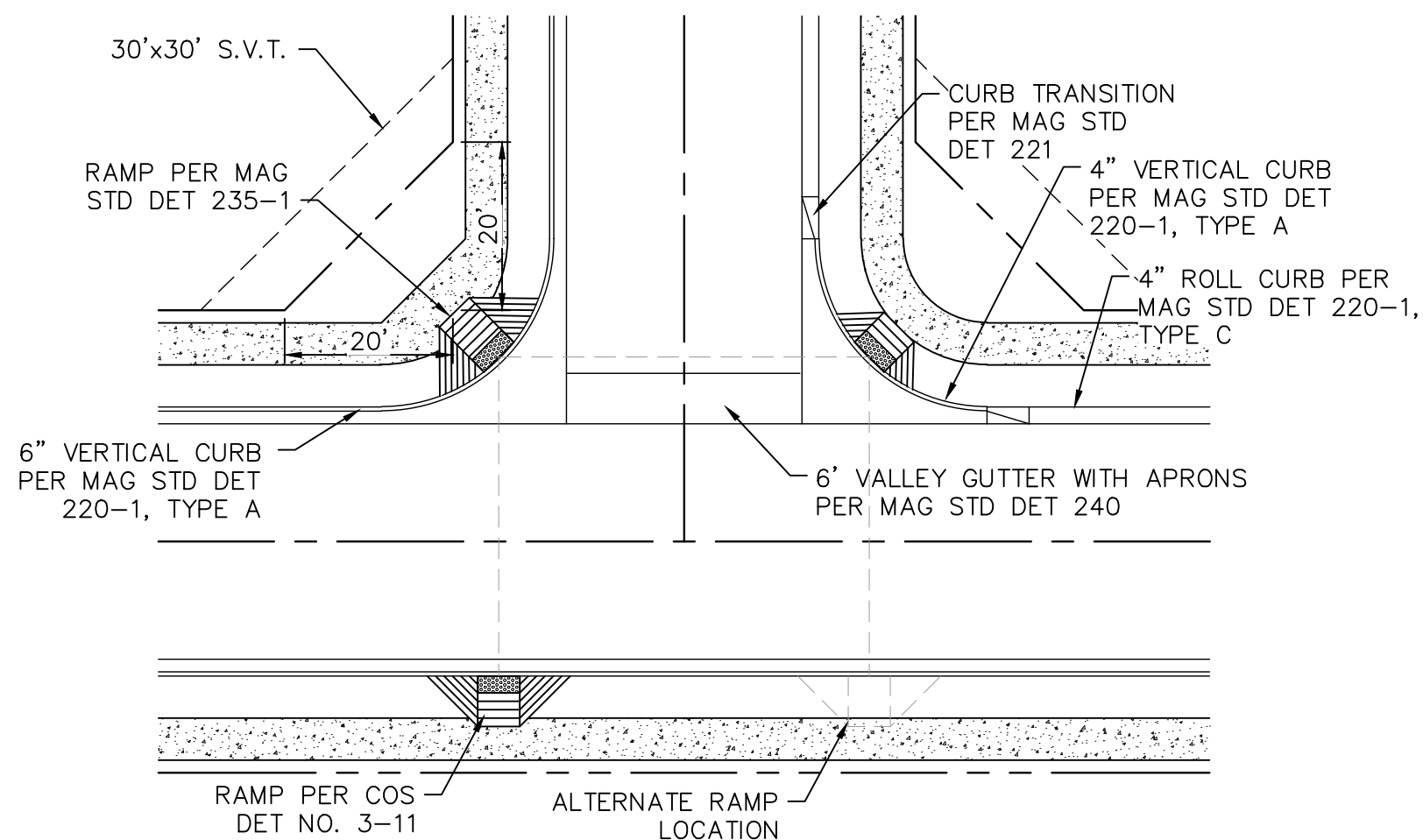
MAGNOLIA DEVELOPMENT DATA TABLE

Parcel	Area (Gross AC)	Area (Net AC)	Zoning	Lot Size	Actual Units	Actual Gross Density	Actual Net Density
1	21.2	19.8	RM-6 PUD	45' X 110'	101	4.8	5.1
2	31.6	30.7	RM-6 PUD	55' X 115'	125	4.0	4.1
3	25.8	23.8	RM-6 PUD	45' X 110'	114	4.4	4.8
4	14.7	12.4	RM-9 PUD	40' X 98' (ALLEY)	66	4.5	5.3
5	8.3	6.9	RM-9 PUD	COMMUNITY CTR.	-	-	-
6	17.1	15.1	RM-9 PUD	40' X 98' (ALLEY)	84	4.9	5.6
7	10.0	9.4	RM-9 PUD	50' X 63' (CLUSTER)	62	6.2	6.6
8	8.6	7.6	RM-9 PUD	50' X 63' (CLUSTER)	54	6.3	7.1
9	19.2	16.5	RM-9 PUD	50' X 63' (CLUSTER)	132	6.9	8.0
10	17.3	15.2	RM-9 PUD	40' X 98' (ALLEY)	74	4.3	4.9
TOTAL	173.8	157.4			812	4.7	5.2

Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sd)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a PUE, in which case the minimum frnt setback for RM-9 shall be 10'.
- (2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building wher adjacent to a public street.
- (4) For RM-6 PUD, single-story minimum setback is 15', and two-story minimum setback is 20'.
- (5) For cluster product in the RM-9 PUD district, the rear two units within each cluster shall be single story, unless the builder choses to fire sprinkler those homes, in which case two story units shall be permitted.



DETAILS AND DATA TABLES FOR MAGNOLIA CITY OF SURPRISE, ARIZONA

SECTION: 14
TWNHP: 3N
RANGE: 2W
JOB NO.: AZCD0002
SHEET 5 OF 20

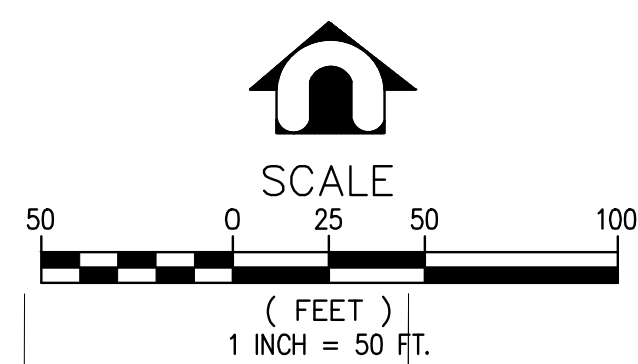
DAVID EVANS AND ASSOCIATES INC.
4800 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

REGISTERED PROFESSIONAL ENGINEER
STATE OF ARIZONA
No. 37287
DAVID EVANS
Signed 11/17/2016
ARIZONA U.S.A.
EXPIRES: 3/31/2017

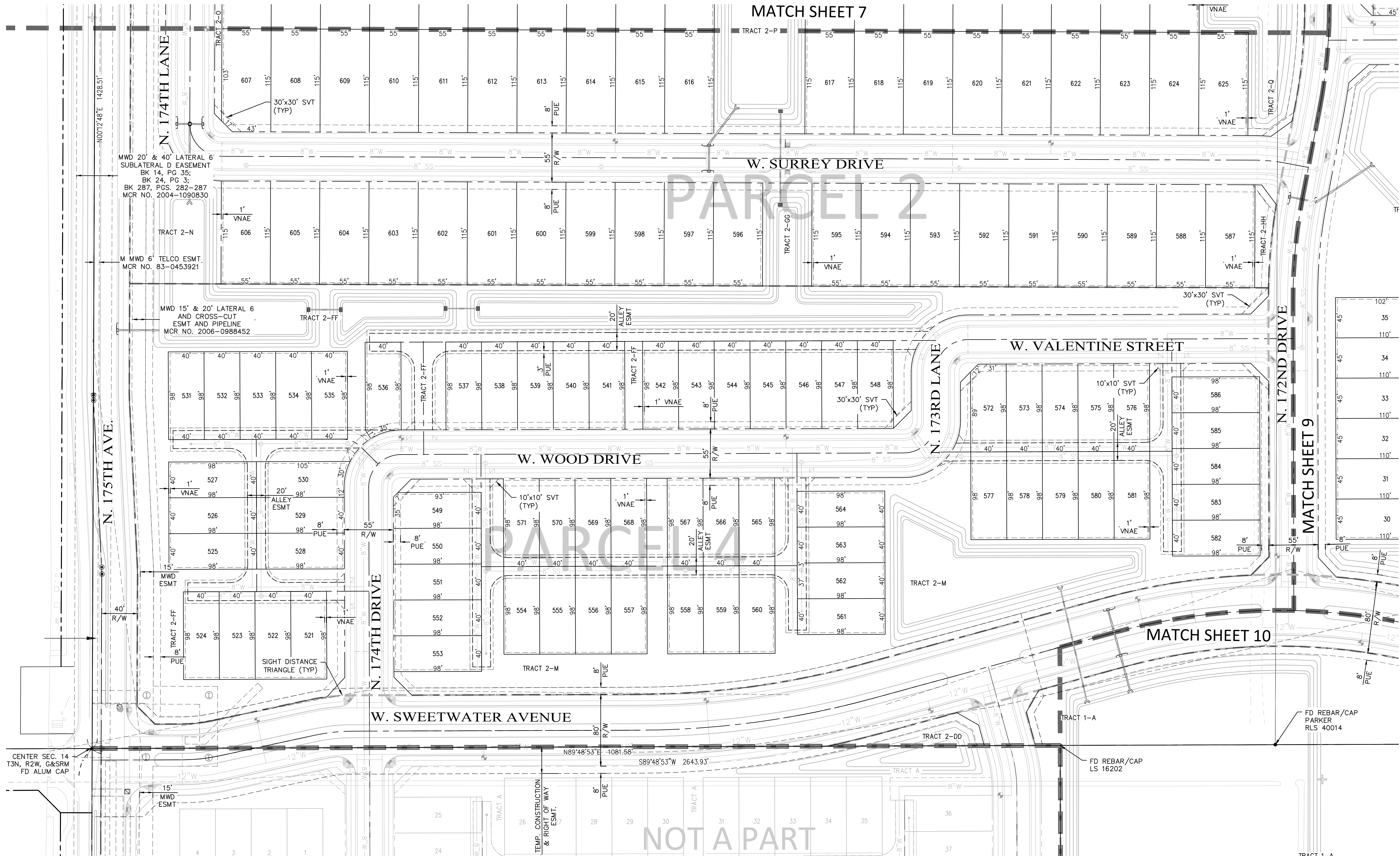
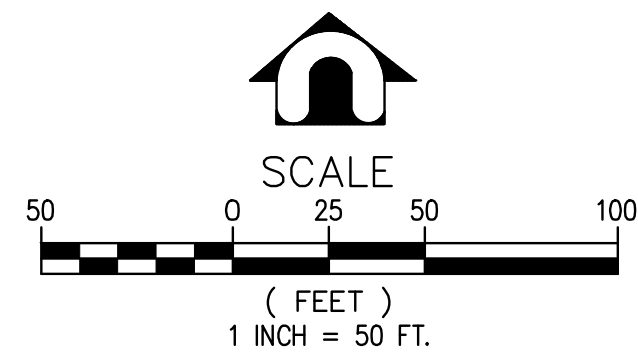
DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
DATE: 11/2016
PROJECT MANAGER: RAMZI GEORGES, P.E.

Call at least two full working days before you begin excavation.
ARIZONA 811
Arizona 811
Dial 8-1-1 or 1-800-874-6847 (785-8348)
In Maricopa County: (602) 253-1100





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PROJECT MANAGER: RAMZI GEORGES, P.E.

DESIGNED BY: .

DRAWN BY: .

CHECKED BY: RYG

DATE: 11/2016

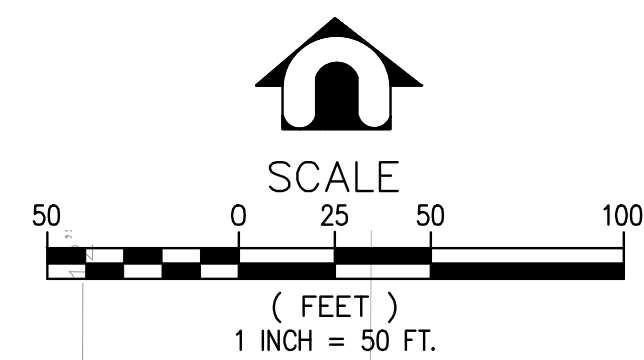
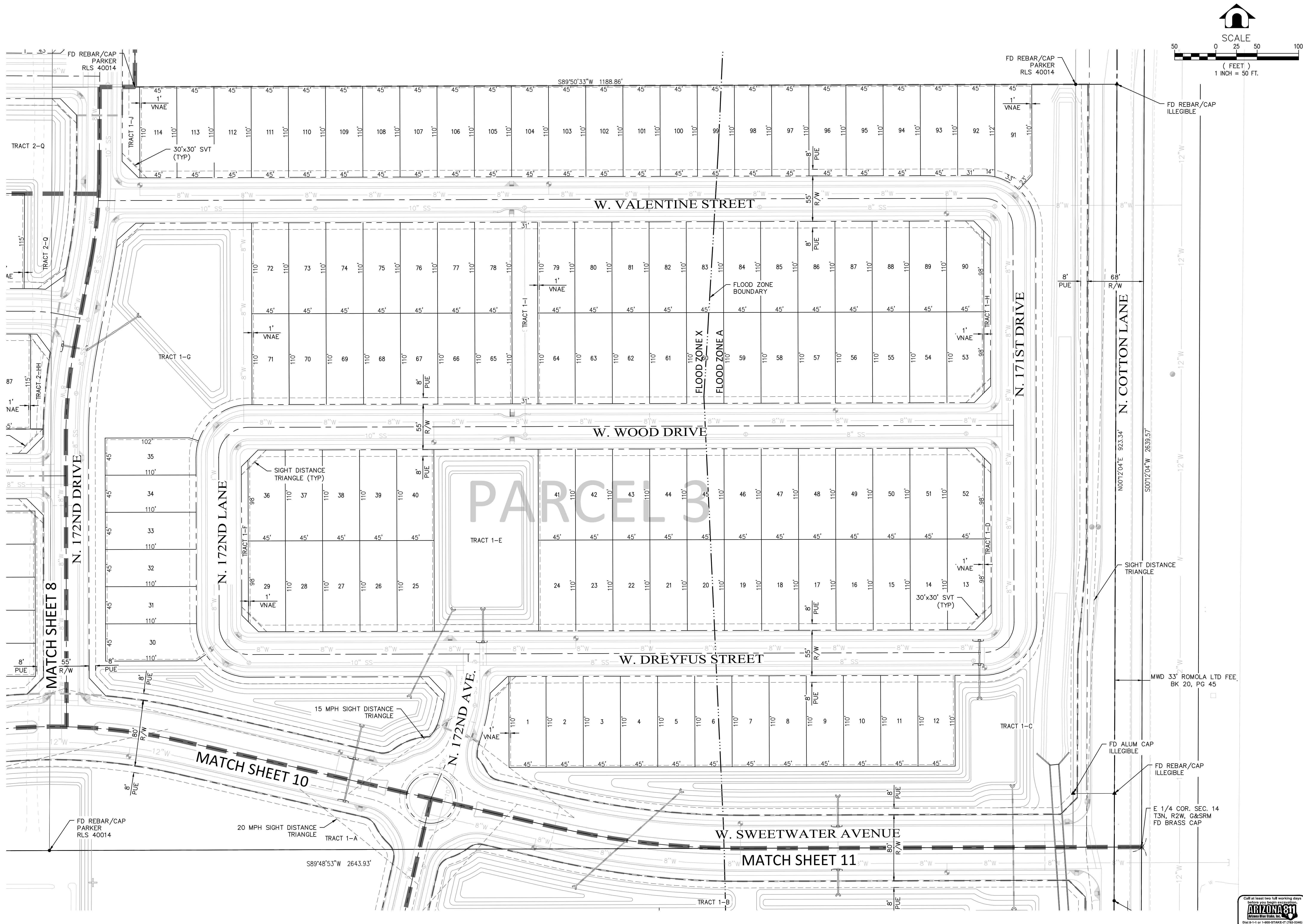
DAVID EVANS AND ASSOCIATES INC.
4800 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

EXPIRES: 3/31/2017

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

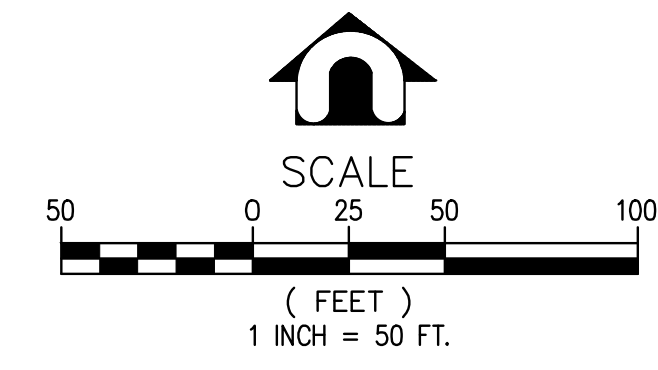
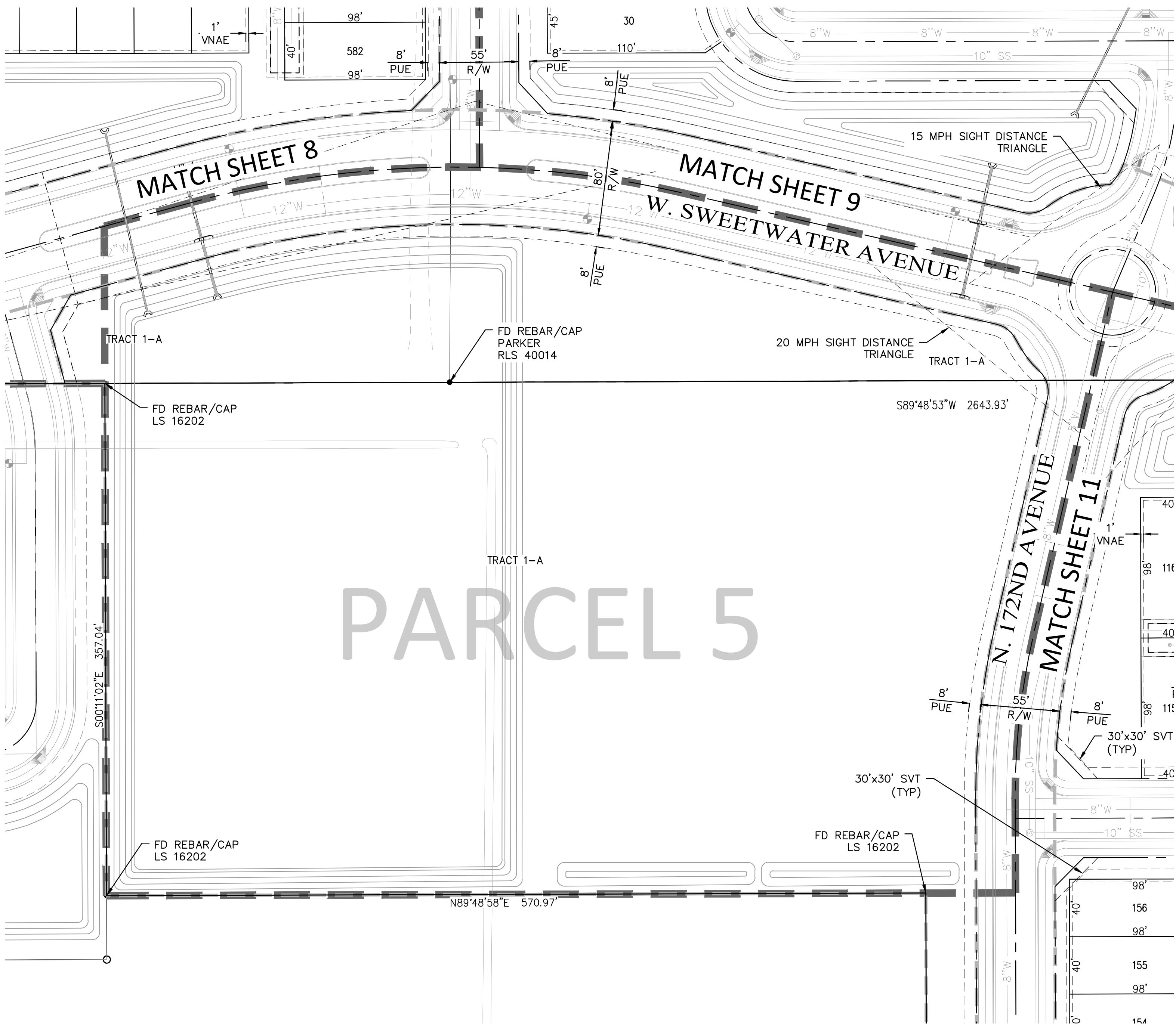
SECTION: 14
TNSHP: 3N
RANGE: 2W
JOB NO.:
AZCD0002
SHEET
8 OF 20





PRELIMINARY PLAT FOR MAGNOLIA CITY OF SURPRISE, ARIZONA				 DAVID EVANS AND ASSOCIATES INC. 4800 E Washington Street, Suite 250 Phoenix Arizona 85034 Phone: 602.678.5151		DESIGNED BY: .. DRAWN BY: .. CHECKED BY: RYG DATE: 11/2016		PROJECT MANAGER: _____ RAMZI GEORGES, P.E.	
SECTION: 14 TWN: 36N RANGE: 2W		JOB NO.: AZCD0002		9 SHEET OF 20		EXPIRES: 3/31/2017			

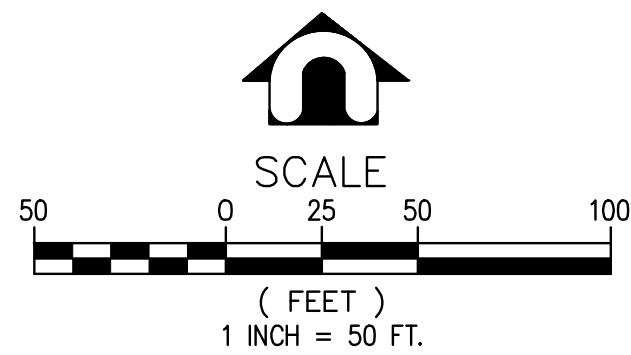
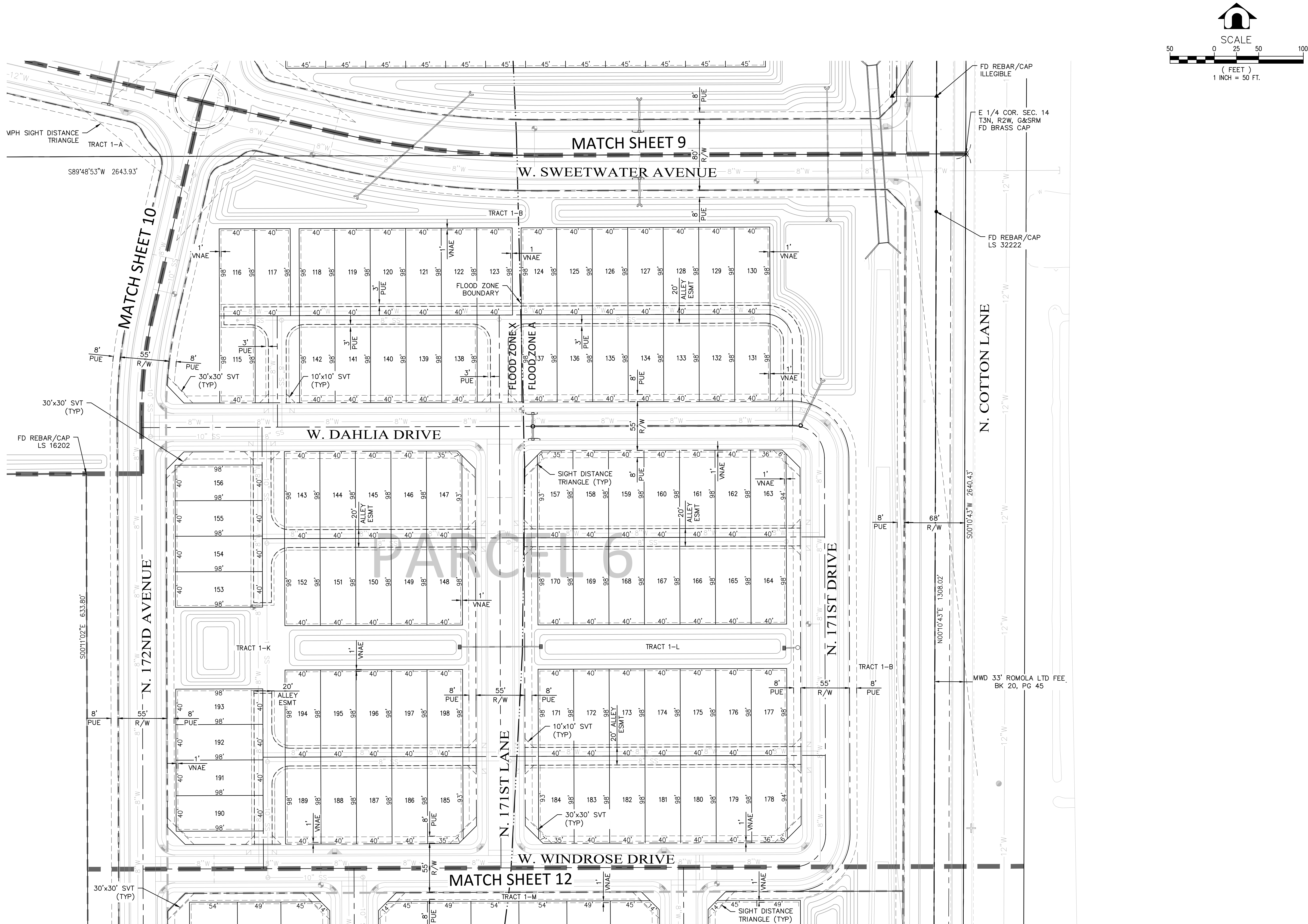
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PROJECT MANAGER: RAMZI GEORGES, P.E.	
DESIGNED BY:	DRAWN BY:
CHECKED BY: RYG	DATE: 11/2016
DAVID EVANS AND ASSOCIATES INC. 4800 E Washington Street, Suite 250 Phoenix Arizona 85034 Phone: 602.678.5151	
 EXPIRES: 3/31/2017	
PRELIMINARY PLAT FOR MAGNOLIA CITY OF SURPRISE, ARIZONA	
SECTION: 14 TWNHP: 3N RANGE: 2W	
JOB NO.: AZCD0002	
SHEET 10 OF 20	



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**DAVID EVANS
AND ASSOCIATES INC.**
4800 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151



EXPIRES: 3/31/2017

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

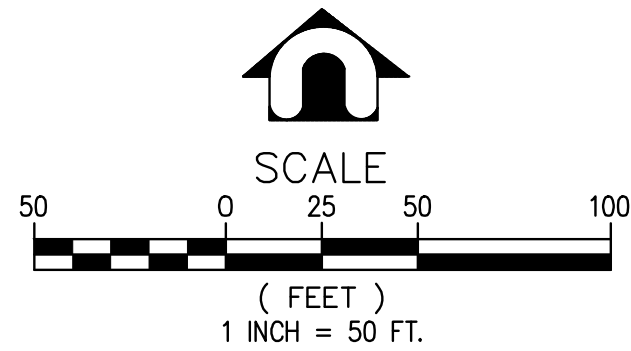
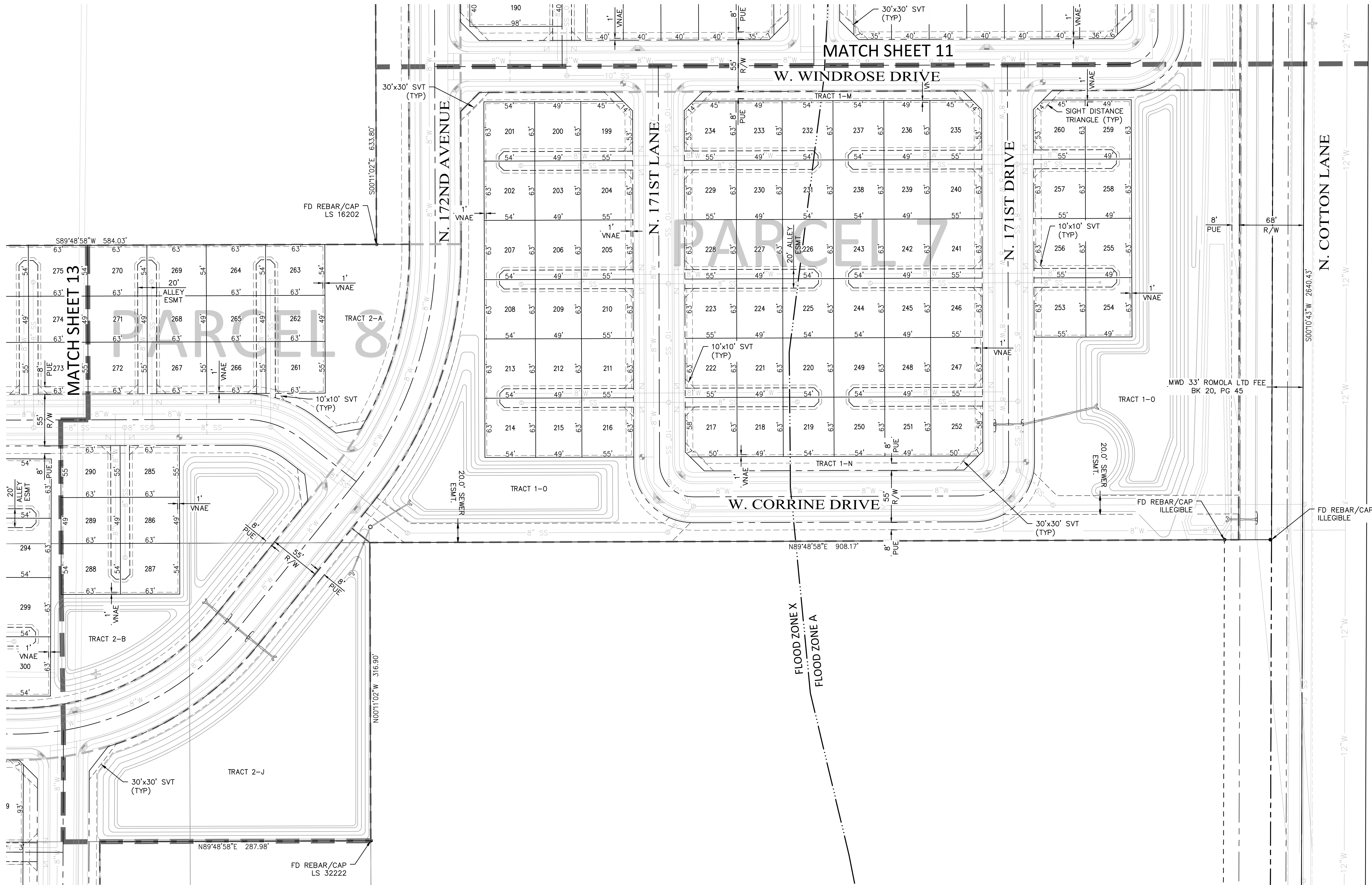
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TWNHP: 3N
RANGE: 2W

JOB NO.:
AZCD0002

SHEET
11 OF 20



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PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

SECTION: 14
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RANGE: 2W
JOB NO.:
AZCD0002

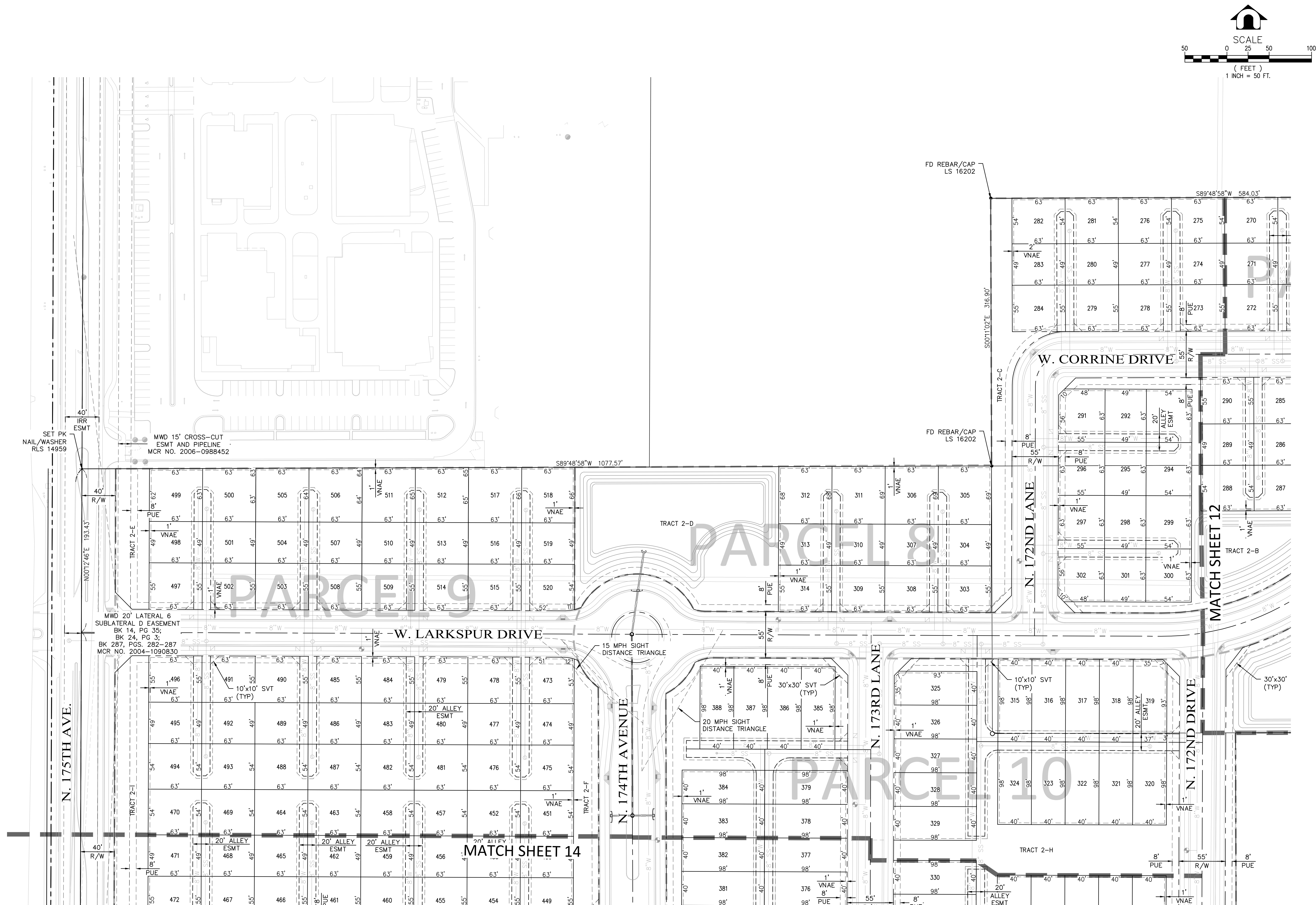
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12 OF 20



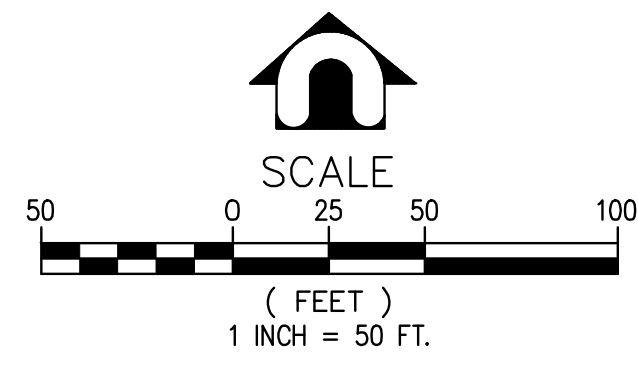
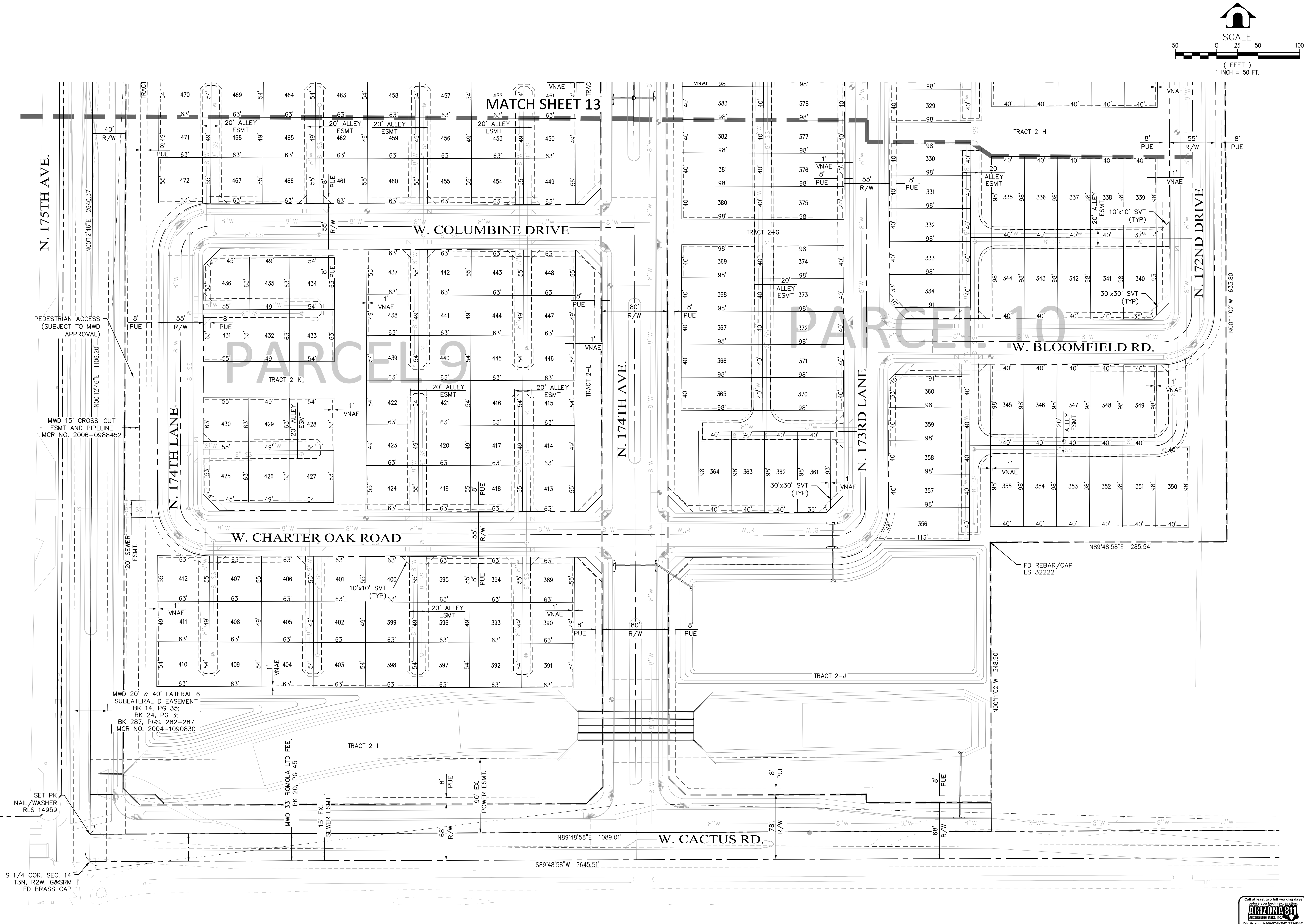
**DAVID EVANS
AND ASSOCIATES INC.**
4800 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

DESIGNED BY:
DRAWN BY:
CHECKED BY: RYG
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PROJECT MANAGER:
RAMZI GEORGES, P.E.



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PROJECT MANAGER: RAMZI GEORGES, P.E.

DESIGNED BY: .

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DATE: 11/2016

**DAVID EVANS
AND ASSOCIATES INC.**
4800 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

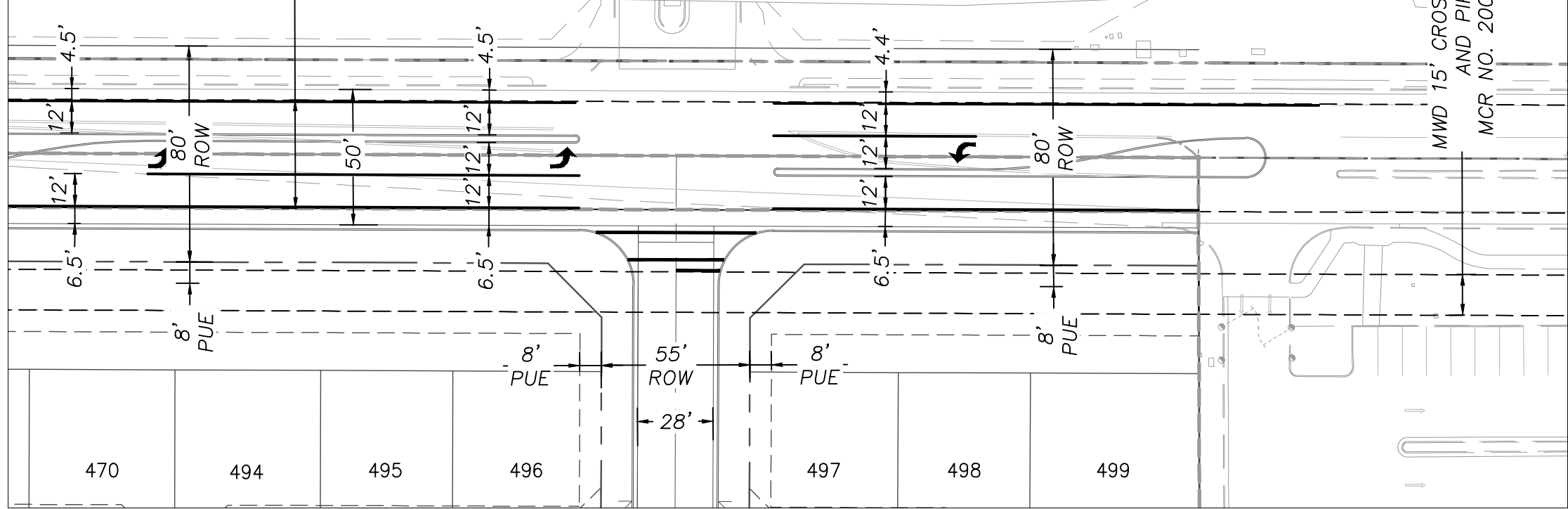
37287
RAMZI GEORGES
Arizona U.S.A.
Expires: 3/31/2017

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W
JOB NO.:
AZCD0002
SHEET
14 OF 20

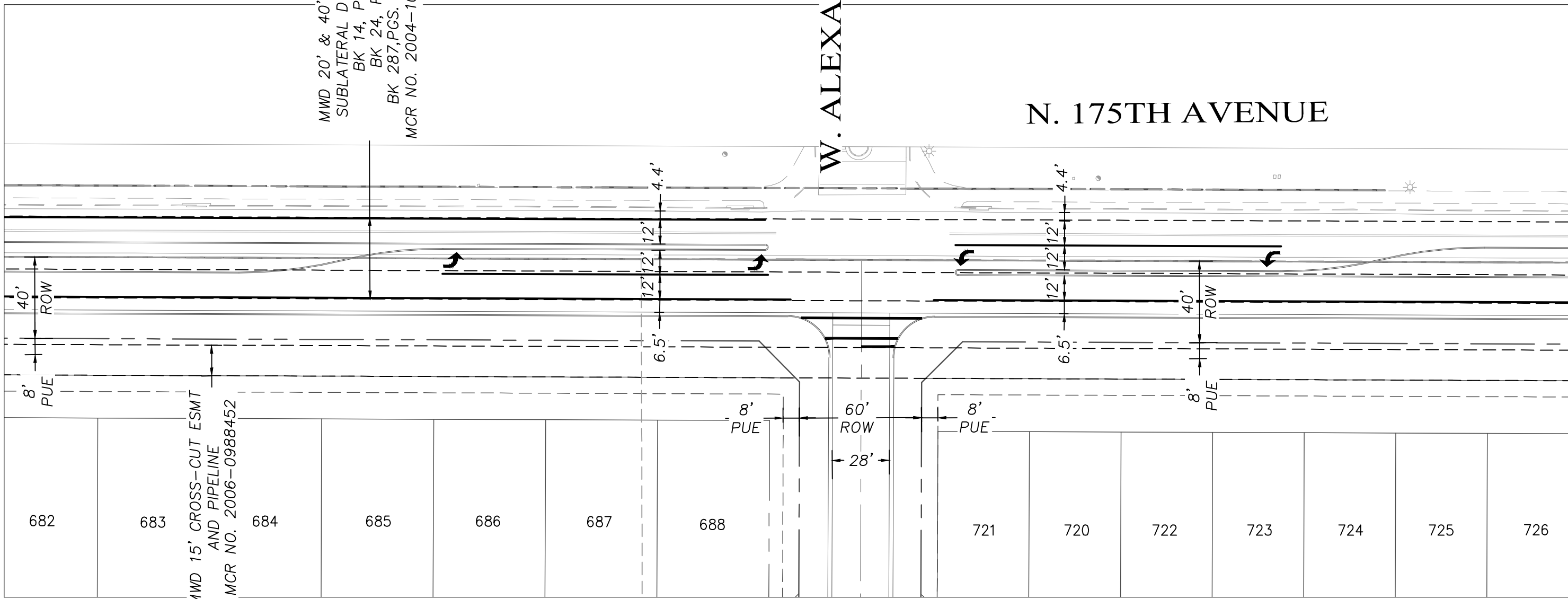


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SUB LATERAL D EASEMENT
BK 14, PG 35;
BK 24, PG 3;
BK 287.PCS. 282-287
MCR NO. 2004-1090830\XROW



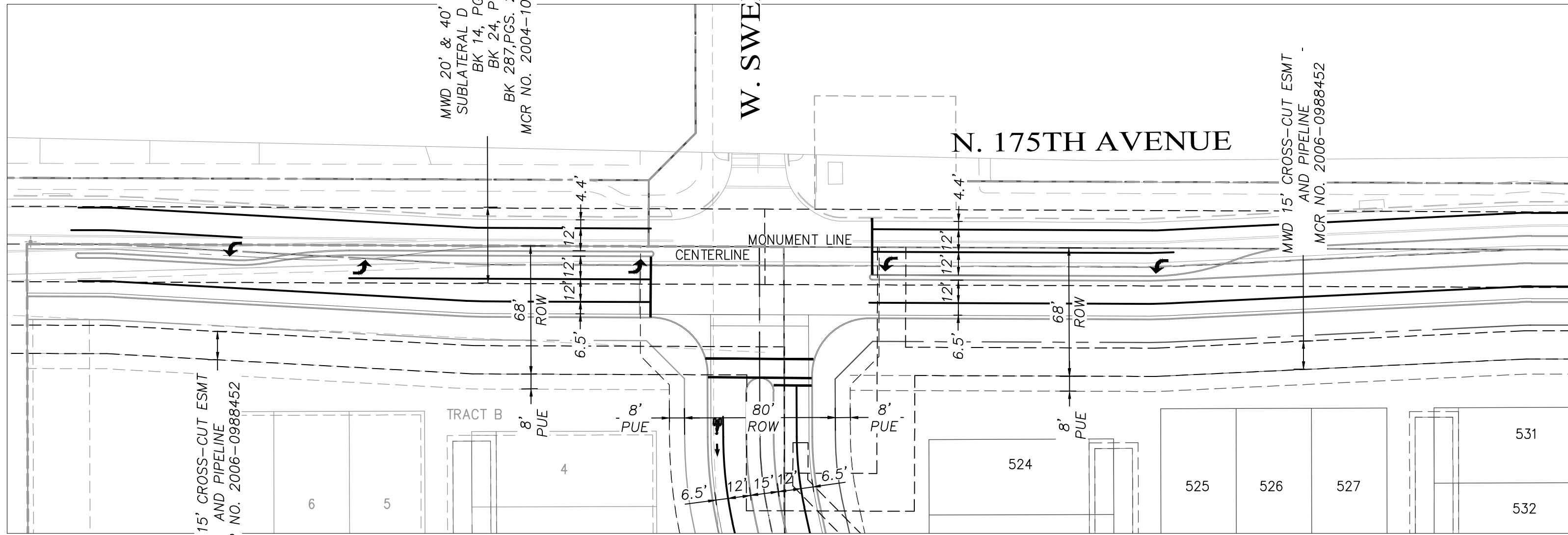
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N. 175TH AVENUE

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BK 24, PG 3;
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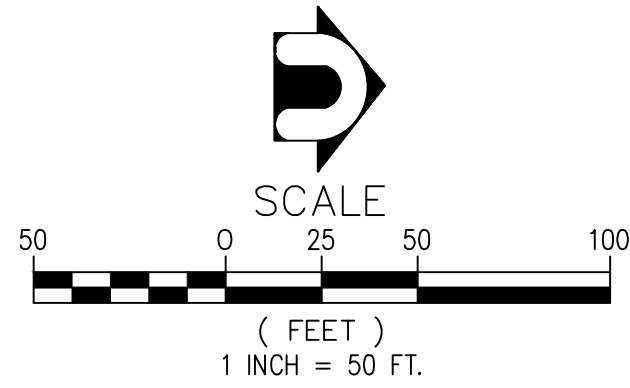


W. ALEXANDRA WAY

MWD 20' & 40' LATERAL 6
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MCR NO. 2004-1090830\XROW



W. SWEETWATER AVE

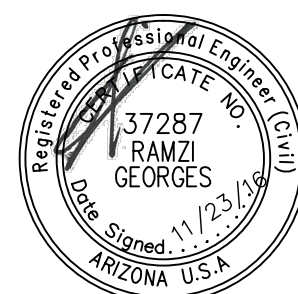


SECTION: 14
TOWNSHIP: 3N
RANGE: 2W

JOB NO.:
AZCD0002

SHEET
15 OF 20

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA



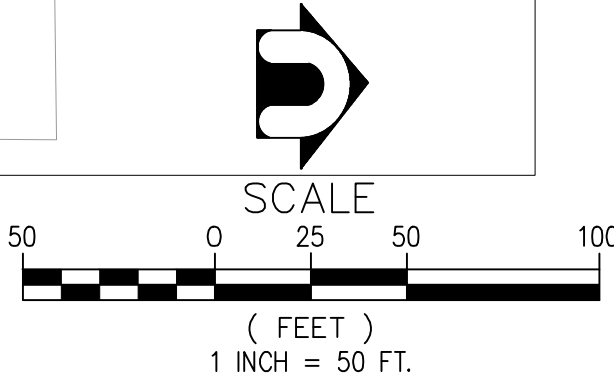
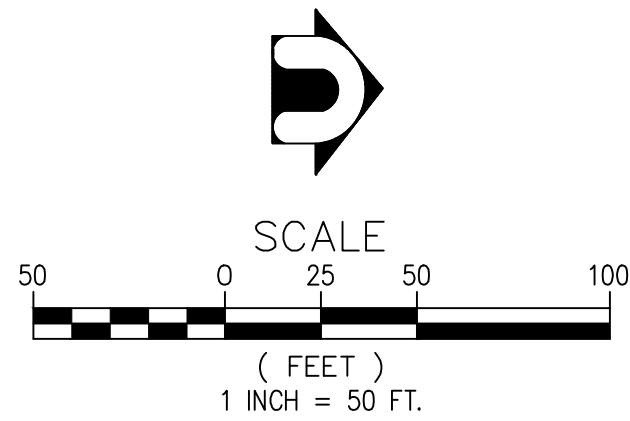
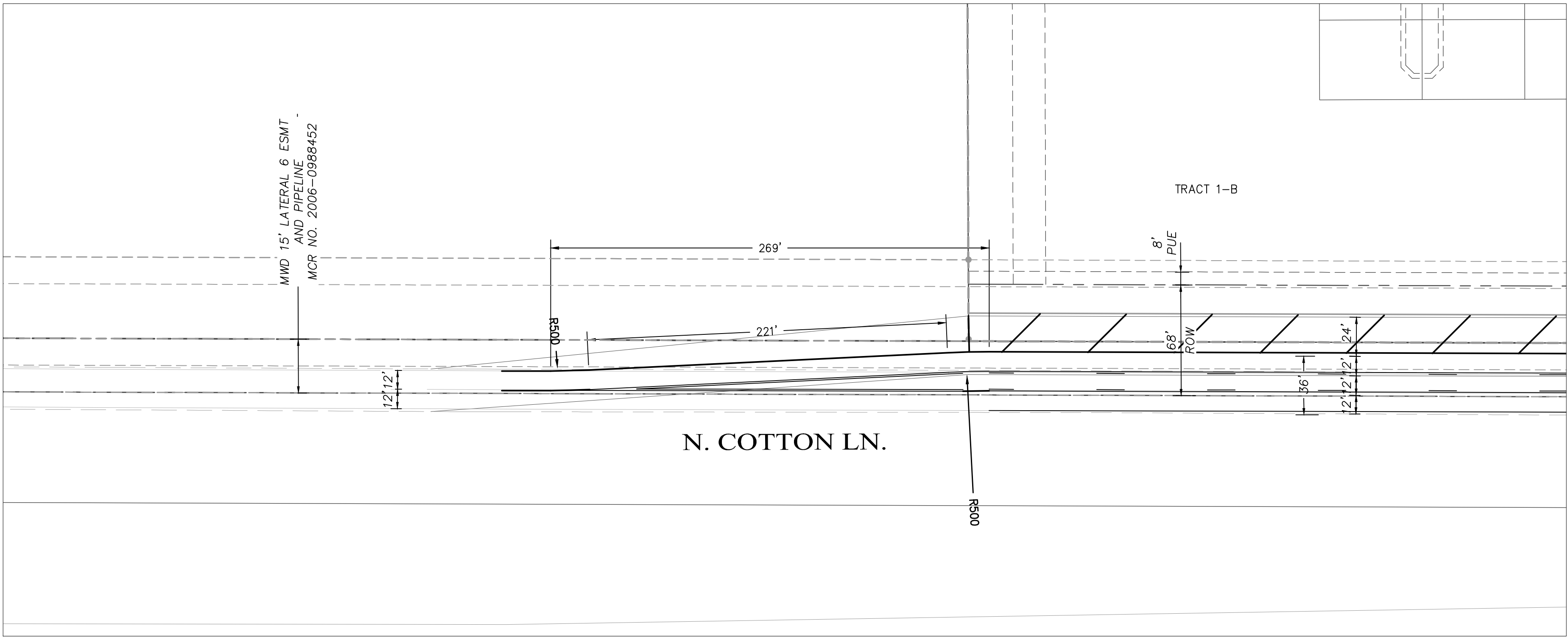
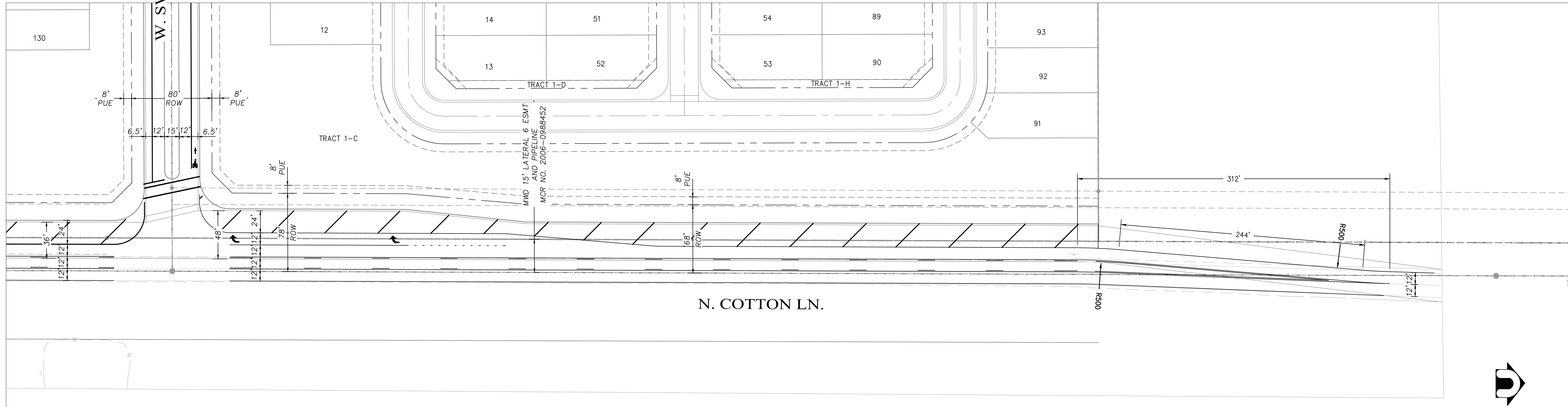
EXPIRES: 3/31/2017

**DAVID EVANS
AND ASSOCIATES INC.**
4800 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602/6351511

DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
DATE: 11/2016

PROJECT MANAGER: RAMZI GEORGES, P.E.

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NOTE:
ROADWAY TRANSITION AND STORAGE LENGTHS
ARE CONCEPTUAL. FINAL CONFIGURATION AND
DESIGN WILL BE DETERMINED PRIOR TO FINAL PLAT
APPROVAL.

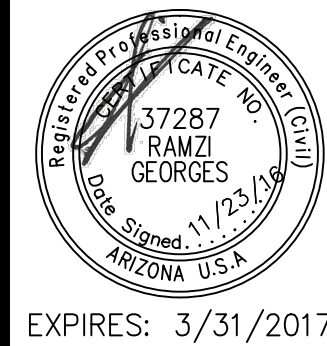


PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

SECTION: 14
TWNSH: 3N
RANGE: 2W

JOB NO.:
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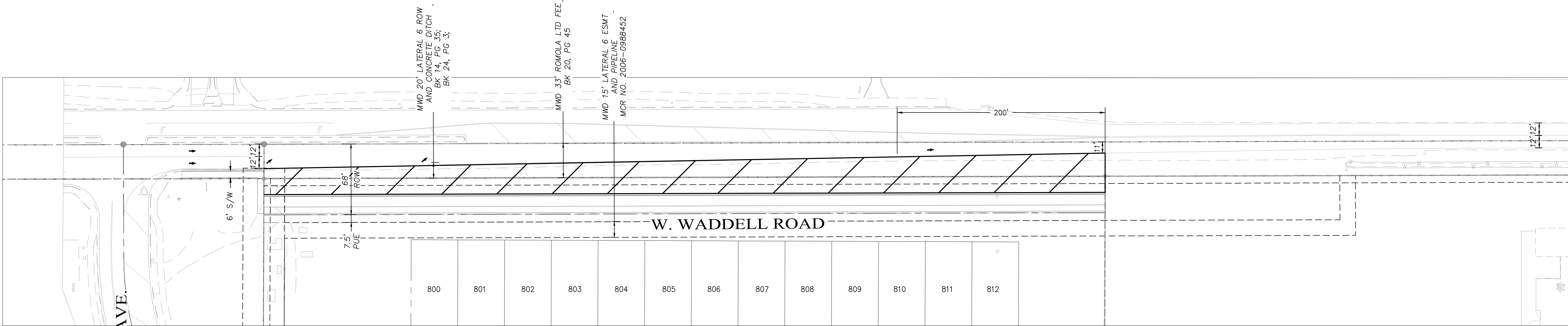
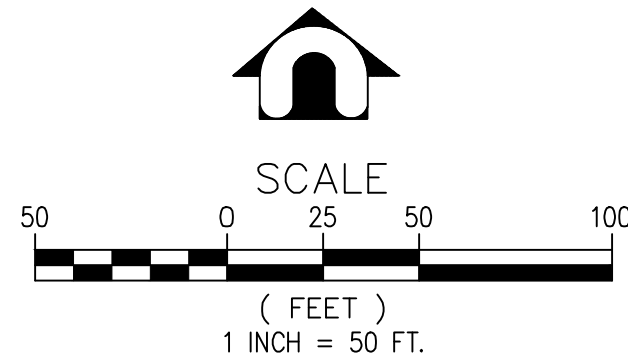
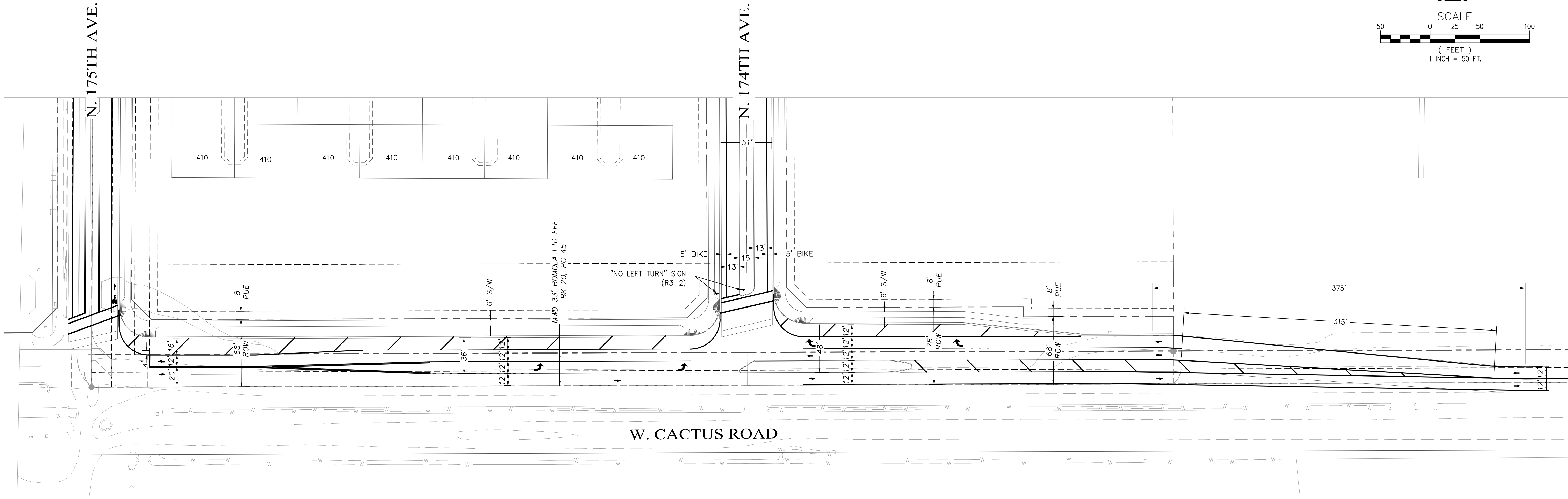
SHEET
16 OF 20



**DAVID EVANS
AND ASSOCIATES INC.**
4600 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602.678.5151

DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
DATE: 11/2016

PROJECT MANAGER: RAMZI GEORGES, P.E.



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PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

EXPIRES: 3/31/2017



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PROJECT MANAGER: RAMZI GEORGES, P.E.

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W

JOB NO.:
AZCD0002

SHEET
17 OF 20

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W. SWEETWATER AVE.

SEE DETAIL A

SEE DETAIL B

N. COTTON LANE

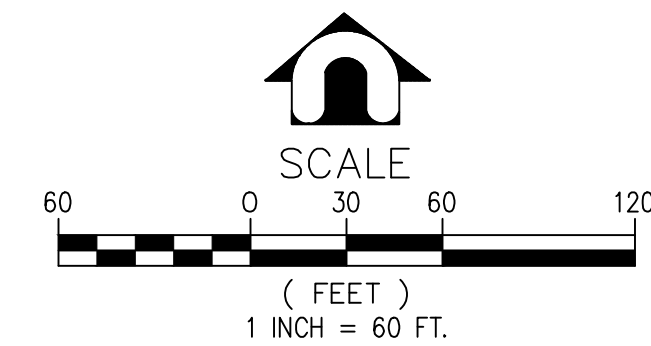
LEGEND

STREET SIGN FOUNDATION,
C.O.S. STD. DTL 4-22
3' X 3' REFUSE BIN, PROVIDE
T STAMPED INTO CURB PER
MAG STD DTL 440-4
COLLECTION ROUTE

NO PARKING
ANY TIME

NO PARKING
5:00AM TO 5:00PM
TRASH DAYS ONLY

NOTE: SIGNAGE TO BE
PROVIDED BY THE DEVELOPER
AND MAINTAINED BY THE CITY.



DETAIL A (ALLEY LOTS)

DETAIL B (CLUSTER LOTS)

PROJECT MANAGER: RAMZI GEORGES, P.E.
DESIGNED BY: .
DRAWN BY: .
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DAVID EVANS
AND ASSOCIATES INC.
4600 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602.678.5151



EXPIRES: 3/31/2017

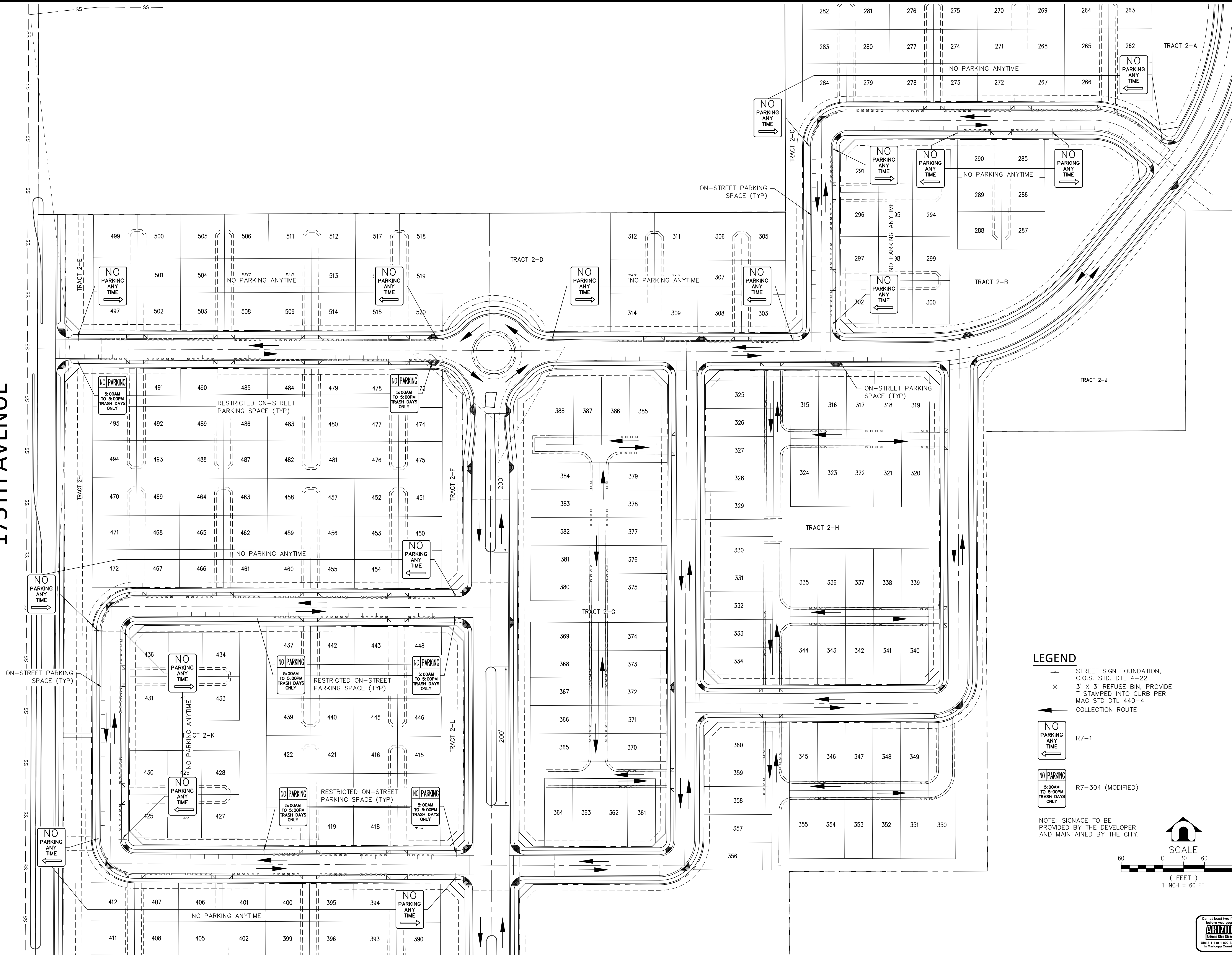
SOLID WASTE COLLECTION ROUTE
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W
JOB NO.:
AZCD0002

SHEET
18 OF 20



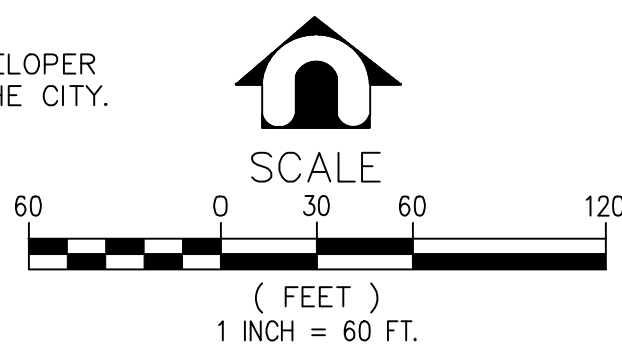
175TH AVENUE



LEGEND

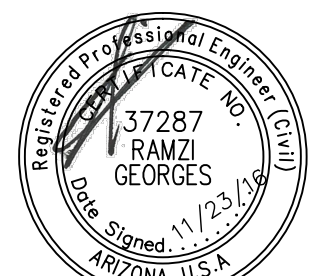
- STREET SIGN FOUNDATION, C.O.S. STD. DTL 4-22
- 3' X 3' REFUSE BIN, PROVIDE T STAMPED INTO CURB PER MAG STD DTL 440-4
- COLLECTION ROUTE
- R7-1
- R7-304 (MODIFIED)

NOTE: SIGNAGE TO BE PROVIDED BY THE DEVELOPER AND MAINTAINED BY THE CITY.



SOLID WASTE COLLECTION ROUTE
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W
JOB NO.:
AZCD0002
SHEET
19 OF 20



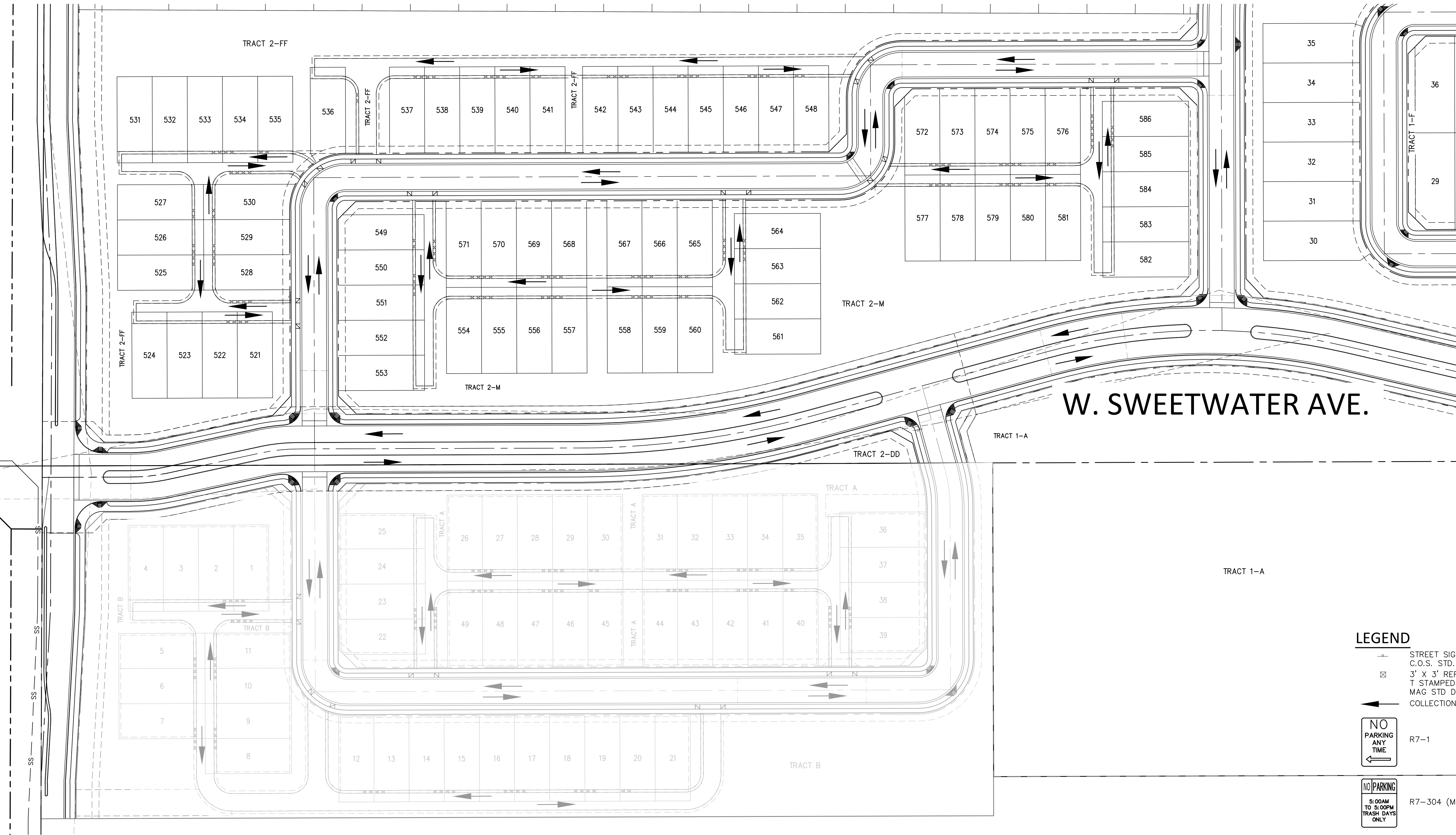
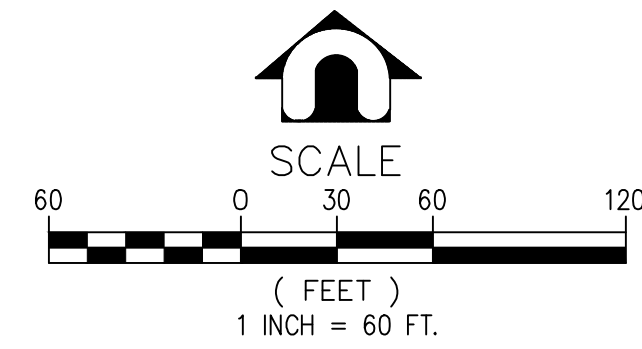
DAVID EVANS
AND ASSOCIATES INC.
4600 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602.678.5151

DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
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PROJECT MANAGER:
RAMZI GEORGES, P.E.

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175TH AVENUE



LEGEND

- STREET SIGN FOUNDATION, C.O.S. STD. DTL 4-22
- 3' X 3' REFUSE BIN, PROVIDE T STAMPED INTO CURB PER MAG STD DTL 440-4
- COLLECTION ROUTE
- NO PARKING ANY TIME R7-1
- NO PARKING 5:00AM TO 5:00PM TRASH DAYS ONLY R7-304 (MODIFIED)

NOTE: SIGNAGE TO BE PROVIDED BY THE DEVELOPER AND MAINTAINED BY THE CITY.

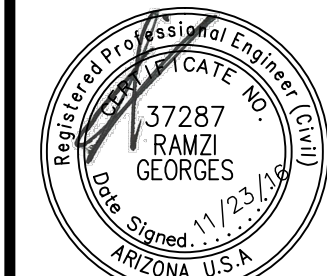


SOLID WASTE COLLECTION ROUTE FOR MAGNOLIA CITY OF SURPRISE, ARIZONA

SECTION: 14
TWN: 3N
RANGE: 2W

JOB NO.: AZCD0002

SHEET 20 OF 20



DAVID EVANS AND ASSOCIATES INC.
4600 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602.678.5151

DESIGNED BY: .
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DATE: 11/2016

PROJECT MANAGER: RAMZI GEORGES, P.E.

MAGNOLIA

SURPRISE, ARIZONA

BY: AZ COMMUNITY DEVELOPMENT, LLC

PRELIMINARY LANDSCAPE PLAN

LANDSCAPE NOTES

- ALL PLANTING AREAS ARE TO HAVE DECOMPOSED GRANITE, 1/2" MINUS COLOR AS SPECIFIED., 2" DEPTH, TYP.
- NO PLANT SUBSTITUTIONS ALLOWED UNLESS APPROVED IN WRITING BY LANDSCAPE ARCHITECT AND CONFORMING TO LOCAL AGENCY'S APPROVED PLANT LIST.
- LANDSCAPE ARCHITECT / OWNER'S REP IS TO APPROVE ALL PLANT MATERIAL PRIOR TO DELIVERY TO SITE. ONE WEEK MINIMUM NOTICE.
- LANDSCAPE CONTRACTOR IS RESPONSIBLE TO VERIFY ALL CONDITIONS ON SITE PRIOR TO PROJECT START-UP.
- LANDSCAPE CONTRACTOR IS RESPONSIBLE TO REPAIR ANY DAMAGES MADE TO EXISTING LANDSCAPING, UNDERGROUND UTILITIES, IRRIGATION LINES, ELECTRICAL LINES, ETC., AT HIS EXPENSE.
- ANY PLANT MATERIAL NOT SHOWN TO REMAIN ON PLAN IS TO BE REMOVED.
- ADJUST ALL NEW LANDSCAPING AS NECESSARY TO ACCOMMODATE EXISTING LANDSCAPE TO REMAIN.
- CONTRACTOR IS TO VERIFY LOCATIONS OF ALL UNDERGROUND UTILITIES PRIOR TO ANY SITE WORK BEING EXECUTED.
- QUANTITIES ON PLAN ARE PROVIDED FOR BIDDING PURPOSES ONLY. LANDSCAPE CONTRACTOR IS RESPONSIBLE TO VERIFY ALL QUANTITIES PRIOR TO CONSTRUCTION.
- ALL AREAS DISTURBED DURING CONSTRUCTION ARE TO BE FINE GRADED AND TREATED TO BLEND EVENLY WITH ALL NEWLY CONSTRUCTED AREAS.
- LANDSCAPE ARCHITECT / OWNERS REPRESENTATIVE RESERVES THE RIGHT TO REJECT ANY PLANT MATERIAL THAT IS DETERMINED TO NOT SATISFY THE DESIGN INTENT OF THE LANDSCAPE PLAN BASED ON SIZE, SHAPE, APPEARANCE, HEALTH, OR IMPROPER CARE.
- ALL BOULDERS ARE TO BE GRANITE 'SURFACE SELECT', SIZE PER PLAN. ALL BOULDERS ARE TO BE BURIED 1/3 IN SOIL.
- ALL SWALE CHANNELS ARE TO HAVE 1" - 3" RIVER ROCK OR OTHER APPROVED STONE MATERIAL INSTALLED TO PREVENT EROSION.
- ALL DOWNSPOUTS / SCUPPERS ARE TO HAVE 3"x3", 3" - 6" RIVER ROCK OR OTHER APPROVED STONE MATERIAL INSTALLED TO PREVENT EROSION.
- ALL BERM CONTOUR INTERVALS ARE AT 1'-0", SLOPES NOT TO EXCEED 4:1.
- ALL TURF IS TO BE BERMUDA HYBRID. MAY BE INSTALLED AS SOD OR HYDROSEED.
- ALL HEADER IS TO BE EXTRUDED CONCRETE CURBING OR EQUAL.
- 100 PERCENT OF ALL RIGHT OF WAY PLANT MATERIAL IS TO BE FOUND ON THE ARIZONA DEPARTMENT OF WATER RESOURCES LOW WATER USE LIST.
- TREES WITH THORNS ARE NOT TO BE LOCATED WITHIN RECREATION AREAS, AND SHALL BE SET A MINIMUM OF 10' AWAY FROM ALL PEDESTRIAN ROUTES.
- ALL SIDEWALKS AND COMMUNITY TRAILS ARE 6' WIDE.
- TREES THAT OVERHANG THE CITY STREETS MUST BE TRIMMED UP TO A CLEAR HEIGHT OF NOT LESS THAN 15'
- TREES WITHIN SIGHT DISTANCE LINES SHALL BE MAINTAINED SO THAT NO LIMBS, LEAVES NEEDLES OR OTHER FOLIAGE ABOVE 30 INCHES OR BELOW 84 INCHES. TREES SHALL NOT OBSTRUCT MORE THAN 20% OF THE VISIBILITY WHEN COMBINED WITH OTHER OBSTRUCTIONS PRESENT.

CITY NOTES

- ALL CHANGES TO BE APPROVED BY THE CITY OF SURPRISE PLANNING DEPARTMENT.
- SIGNS REQUIRE A SEPARATE PERMIT.
- ALL UTILITY BOXES AND STRUCTURES ARE TO BE SCREENED FROM VIEW.
- PLANT MATERIAL IS NOT TO BE LOCATED WITHIN 3 FEET OF ANY FIRE HYDRANT OR FIRE DEPARTMENT CONNECTION.
- ROOT BARRIER PER CITY OF SURPRISE EDS 8-14 IS REQUIRED FOR ANY TREE LOCATED WITH THREE (3) FEET OF ANY SIDEWALK, CURB, PAVEMENT OR WALL.
- ALL PLANT MATERIAL SIZES ARE TO BE CONSISTENT WITH ANA STANDARDS.
- ALL PLANT MATERIAL LOCATED WITHIN VISIBILITY TRIANGLES ARE TO BE MAINTAINED NO HIGHER THAN 30 INCHES HIGH, AND HANG NO LOWER THAN 7 FEET FROM GROUND ELEVATION, INCREASING TO 10' CLEARANCE WHERE APPROACHING STOP SIGNS.
- TRAILS AND PATHWAYS ARE TO BE ADA COMPLIANT, WHERE PRACTICAL.
- SIDEWALKS AND SIDEWALK SEPERATION WILL CONFORM TO THE CITY OF SURPRISE PLANNING AND DESIGN GUIDELINES.

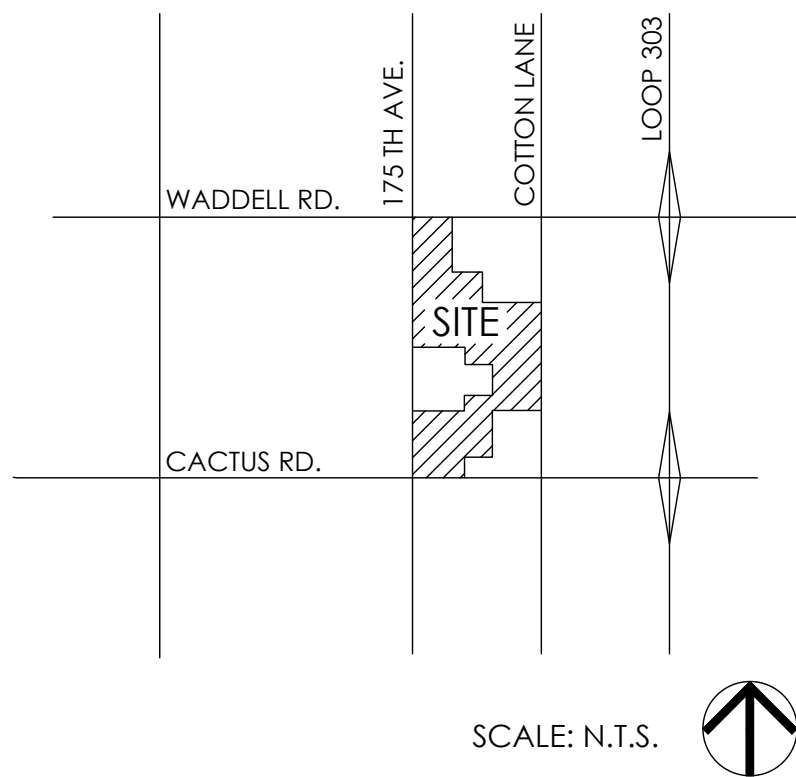
PROJECT DATA

CURRENT ZONING: RU-43 (COUNTY)
PROPOSED ZONING: *RM-6 PUD, RM-9 PUD
GROSS AREA: 181.1 AC.
NET AREA: 167.2 AC.
OPEN SPACE AREA: 21.0 AC.

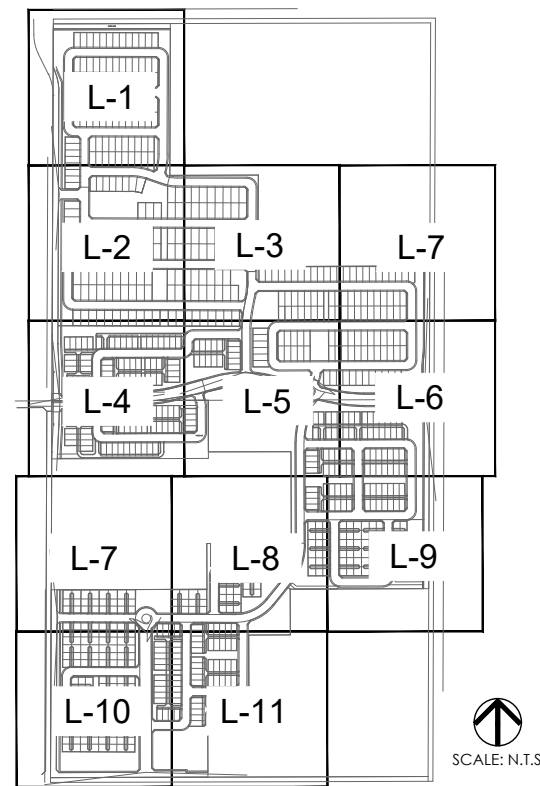
FOR TRACT TABLE SEE PRELIMINARY PLAT, SHEET 2, BY DAVID EVANS AND ASSOCIATES.

*UPON SUCCESSFUL ANNEXATION PER FS16-437 AND SUBSEQUENT ZONING APPROVAL PER FS16-392

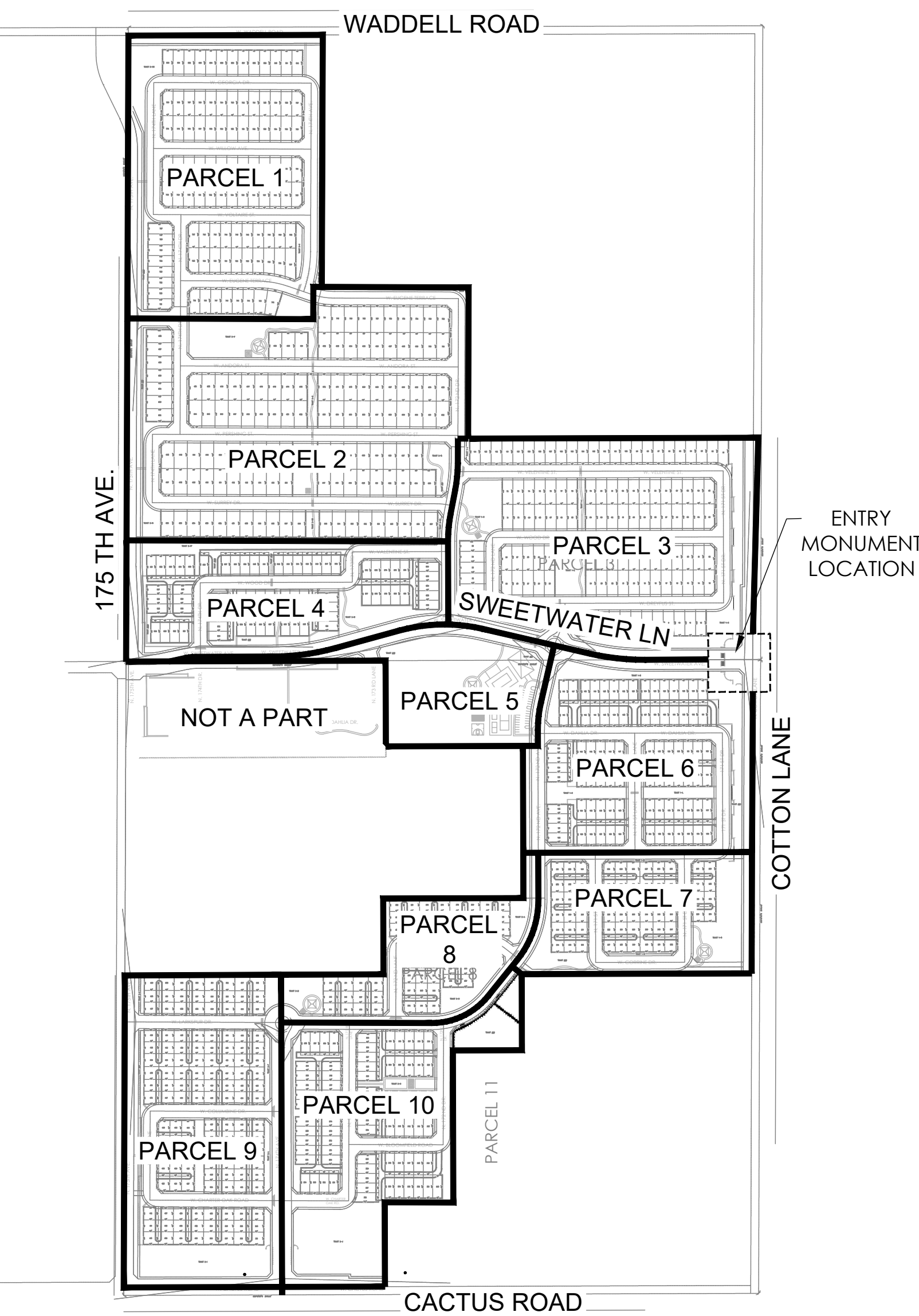
VICINITY MAP



KEYMAP



OVERALL PARCEL PLAN



PRELIMINARY PLANT PALETTE

Trees: <i>Acacia aneura</i> Mulga <i>Bauhinia mexicana</i> * Orchid Tree <i>Bauhinia lunariodes</i> * Anacaco Orchid Tree <i>Brachychiton populneus</i> * Bottle Tree <i>Caesalpinia cacalaco</i> Casalote 'Smoothie' <i>Chitalpa tashkentensis</i> 'Pink Dawn' * Chitalpa <i>Citrus calamondin</i> Mandarin Orange <i>Cupressus sempervirens</i> Italian Cypress <i>Dalbergia sissoo</i> * Indian Rosewood <i>Eucalyptus microtheca</i> * Colibah Tree <i>Ficus microcarpa</i> Indian Laurel Fig	<i>Fraxinus uhdei</i> Shamel Ash <i>Fraxinus velutina</i> Arizona Ash <i>Fraxinus velutina</i> 'Fan Tex' Fan Tex Ash <i>Jacaranda mimosifolia</i> Jacaranda <i>Ligustrum lucidum</i> Glossy Privet <i>Magnolia grandiflora</i> <i>Olea europaea</i> 'Swan Hill' Swan Hill Olive <i>Pistacia chinensis</i> 'Red Push' ** Red Push Pistache <i>Quercus virginiana</i> 'Heritage' ** Heritage Live Oak <i>Schinus teribinthifolius</i> Brazilian Pepper Tree <i>Sophora secundiflora</i> ** Texas Mountain Laurel	<i>Thevetia peruviana</i> * Yellow Oleander <i>Tipuana tipu</i> * Tipu Tree <i>Ulmus parvifolia</i> .cv 'Sempervirens' * Chinese Evergreen Elm <i>Vitex agnus-castus</i> 'Montrose Purple' Chaste Tree
Shrubs: <i>Buxus japonica</i> 'Green Beauty' Japanese Boxwood <i>Callistemon citrinus</i> 'Little John' * Little John Bottlebrush <i>Carissa micorcarpa</i> 'Boxwood Beauty' Boxwood Beauty Natal Plum <i>Chrysactinia mexicana</i> Damianita * <i>Dietes bicolor</i> Fortnight Lily <i>Eremophila maculata</i> 'Valentine' * Emu Bush <i>Feijoa sellowiana</i> Pinnacle Guava <i>Gardenia jasminoides</i> Gardenia <i>Hibiscus rosa-sinensis</i> Chinese Hibiscus	<i>Ilex vomitoria</i> 'Stokes' Dwaft Yaupon <i>Ligustrum japonicum</i> Japanese Privet <i>Muhlenbergia rigens</i> * Deer Grass <i>Myrtus communis</i> 'Compacta' * Dwarf Myrtle <i>Nandina domestica</i> Compacta * <i>Osmanthus fragrans</i> Sweet Olive <i>Photinia fraseri</i> Red Photinia <i>Plumbago auriculata</i> * Cape Plumbago <i>Pyracantha koidzumii</i> 'Santa Cruz' * Santa Cruz Prostrata <i>Raphiolepis indica</i> 'Ballerina' Ballerina	<i>Simmondsia chinensis</i> Jojoba <i>Tecoma stans</i> 'Orange Jubilee' Arizona Yellow Bells <i>Vauquelinia californica</i> * Arizona Rosewood
Accents: <i>Cycas revoluta</i> * Sago Palm <i>Guara lindheimeri</i> Lindheimer's beeblossom	<i>Hesperaloe parviflora</i> * Red yucca <i>Yucca bacata</i> * Banana Yucca	<i>Yucca gloriosa</i> * Spanish Dagger <i>Yucca recurvifolia</i> * Pendulous Yucca
Ground Covers: <i>Carissa grandiflora</i> Green Carpet' Natal Plum <i>Convolvulus tricolor</i> Dwarf Morning Glory <i>Gazania rigens</i> 'Sun Gold' * Sun Gold * <i>Hedera helix</i> English Ivy <i>Lantana camera</i> 'New Gold' * New Gold Lantana <i>Lantana montevidensis</i> * Purple Trailing Lantana	<i>Lantana montevidensis</i> 'White' * Trailing White Lantana <i>Liriope muscari</i> Lilyturf <i>Pentas lanceolata</i> Egyptian Star <i>Rosmarinus officinalis</i> 'Prostratus' * Prostrate Rosemary <i>Trachelospermum asiaticum</i> Dwarf Star Jasmine <i>Verbena species</i>	<i>Vinca major</i> Vinca Major <i>Zephyranthes sp</i> Rain Lily
Vines <i>Bougainvillea brasiliensis</i> 'La Jolla' * La Jolla Bougainvillea <i>Gelsemium sempervirens</i> Carolina Jasmine	<i>Grewia occidentalis/caffra</i> Lavender Star Flower <i>Lonicera japonica</i> 'Halliana' Hall's Honeysuckle	<i>Rosa banksiae</i> * Lady Bank's Rose

Notes:

- * Plants on the ADWR Low Water Use Drought Tolerant plant list.
- ** Plant species that are approved for use in public right-of-way per EDS 8.1.4.
- Plants with an invasive root system will not be planted near sidewalks, pavements, wall, etc. and are indicated by **bold type and underline**.
- Trees with erect growth habit within the right-of-way or adjacent to any sidewalk shall have their main vertical leader intact and shall remained unclipped.

SHEET INDEX

SHEET	PAGE #	TITLE
C-1	1	COVER SHEET
L-1	2	LANDSCAPE PLAN
L-2	3	LANDSCAPE PLAN
L-3	4	LANDSCAPE PLAN
L-4	5	LANDSCAPE PLAN
L-5	6	LANDSCAPE PLAN
L-6	7	LANDSCAPE PLAN
L-7	8	LANDSCAPE PLAN
L-8	9	LANDSCAPE PLAN
L-9	10	LANDSCAPE PLAN
L-10	11	LANDSCAPE PLAN
L-11	12	LANDSCAPE PLAN
W-1	13	WALL & MAILBOX PLAN
W-2	14	WALL & MAILBOX PLAN
W-3	15	WALL & MAILBOX PLAN
WD-1	16	WALL DETAILS

PROJECT TEAM

Discipline	Company Contact Info.
Client	AZ Community Development, LLC. Joseph J. Kalish 11024 N 28th Drive, Suite 170 Phoenix, AZ 85029 (602) 499-0899 joseph@jjkalish.com
Landscape Architect	LVA Urban Design Studio Laura Thelen, RLA 120 South Ash Avenue Tempe, Arizona 85281 (480) 994-0994 lthelen@lvadesign.com
Civil Engineer	David Evans and Associates Inc. Ramzi Georges, PE, CFPM 4600 E. Washington St., Suite 250 Phoenix, Arizona 85034 (602) 474-9223 ryg@deainc.com

AMENITIES LIST (BY PARCEL)

Parcel 1: (1) Paved trails (1) Turf retention basins	Parcel 6: (1) Turf play area/paved trails
Parcel 2: (1) Tot lot/paved trails (2) 20'x20' Ramada (3) Turf retention basins	Parcel 7: (1) Tot lot/paved trails (1) 20'x20' Ramada (2) Turf retention basins
Parcel 3: (1) Tot lot/paved trails (1) 20'x20' Ramada (2) Turf retention basins	Parcel 8: (1) Tot lot/paved trails (1) 20'x20' Ramada (3) Turf retention basins
Parcel 4: (1) Turf retention/paved trails	Parcel 9: (1) Turf play area/paved trails
Parcel 5: (1) Tot lot/paved trails (1) Pool/Splash pad (1) Sand Volleyball (1) Sports Court (1) Tennis Court (2) Pickleball Court (1) Turf play area (1) Multi-Purpose Community Center	Parcel 10: (1) Dog park/paved trails (1) 20'x20' Ramada (2) Turf retention basins

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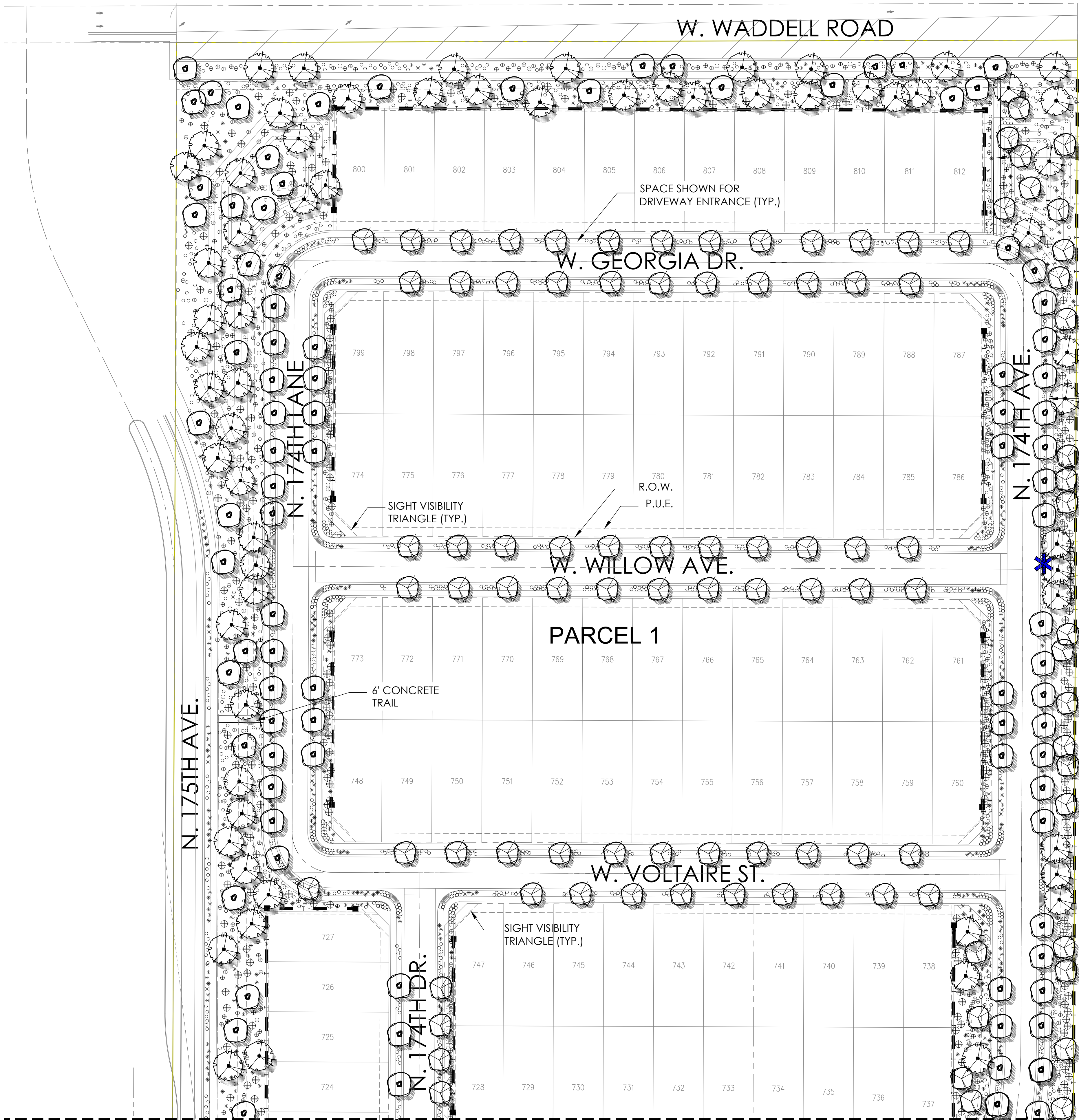
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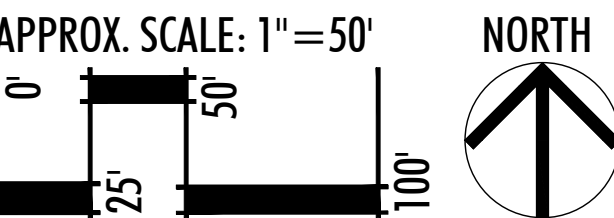
PRELIMINARY PLANT PALETTE

Trees: <i>Acacia aneura</i> Mulga <i>Bauhinia mexicana</i> * Orchid Tree <i>Bauhinia lunariodes</i> * Anacaco Orchid Tree <i>Brachychiton populneus</i> * Bottle Tree <i>Caesalpinia cacalaco</i> Cascalote 'Smoothie' <i>Chitalpa tashkentensis</i> 'Pink Dawn' Chitalpa <i>Citrus calamondin</i> Mandarin Orange <i>Cupressus sempervirens</i> Italian Cypress <i>Dalbergia sissoo</i> * Indian Rosewood <i>Eucalyptus microtheca</i> * Colibah Tree <i>Ficus microcarpa</i> Indian Laurel Fig	<i>Fraxinus uhdei</i> Shamel Ash <i>Fraxinus velutina</i> Arizona Ash <i>Fraxinus velutina</i> 'Fan Tex' Fan Tex Ash <i>Jacaranda mimosifolia</i> Jacaranda <i>Ligustrum lucidum</i> Glossy Privet <i>Magnolia grandiflora</i> <i>Olea europaea</i> 'Swan Hill' Swan Hill Olive <i>Pistacia chinensis</i> 'Red Push' ** Red Push Pistache <i>Quercus virginiana</i> 'Heritage' ** Heritage Live Oak <i>Schinus terbinthifolius</i> Brazilian Pepper Tree <i>Sophora secundiflora</i> ** Texas Mountain Laurel	<i>Thevetia peruviana</i> * Yellow Oleander <i>Tipuana tipu</i> * Tipu Tree <i>Ulmus parvifolia</i> ,cv 'Sempervirens' * Chinese Evergreen Elm <i>Vitex agnus-castus</i> 'Montrose Purple' Chaste Tree
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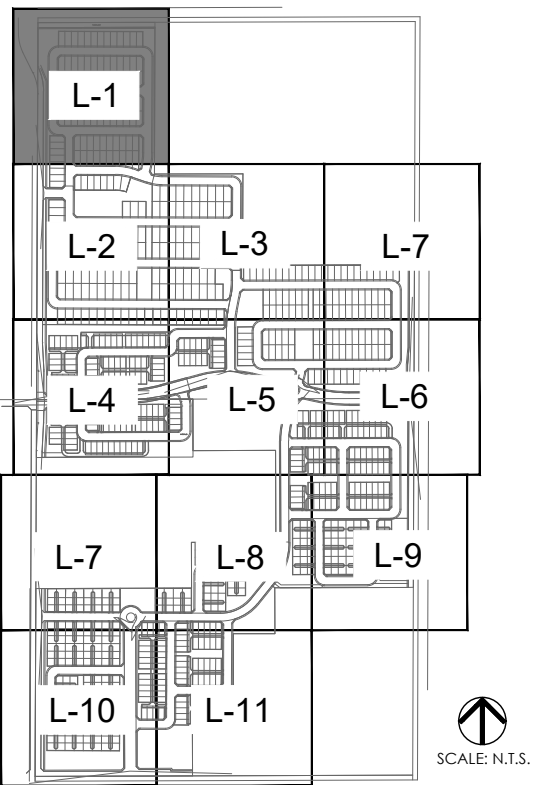
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LEGEND

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THEME WALL (DETAIL 4, SHT WD-1)	
FULL VIEW FENCE (DETAIL 5, SHT WD-1)	
PARTIAL VIEW FENCE (DETAIL 6, SHT WD-1)	
PONY WALL (DETAIL 7, SHT WD-1)	
BUILDER WALL	
DOG FENCE (DETAIL 9, SHT WD-1)	
MAILBOX CLUSTER (DETAIL 8, SHT WD-1)	



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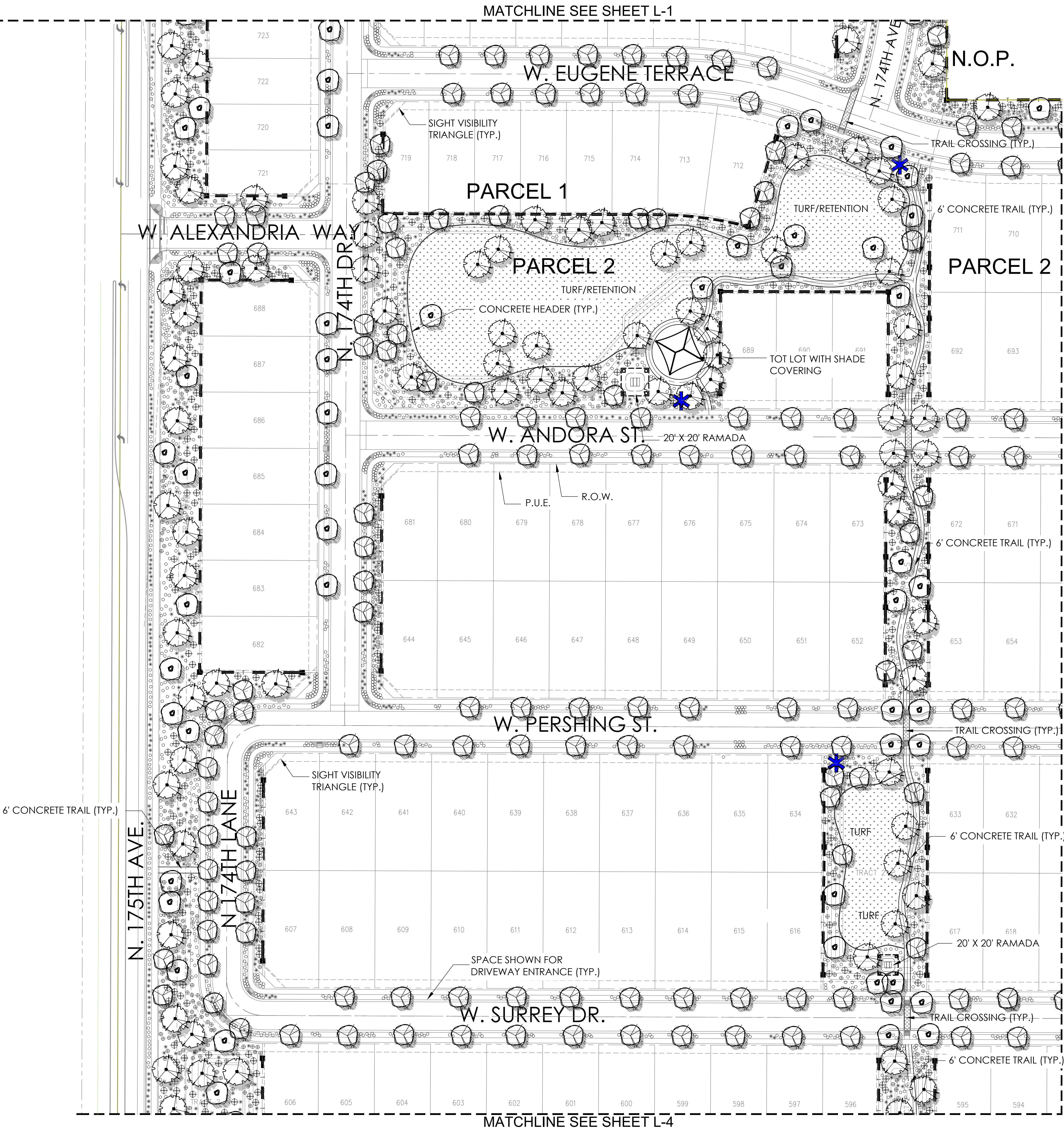
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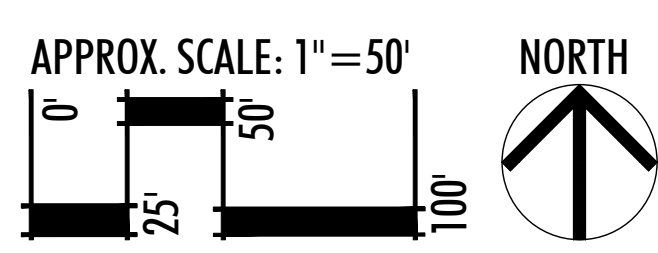
PRELIMINARY PLANT PALETTE

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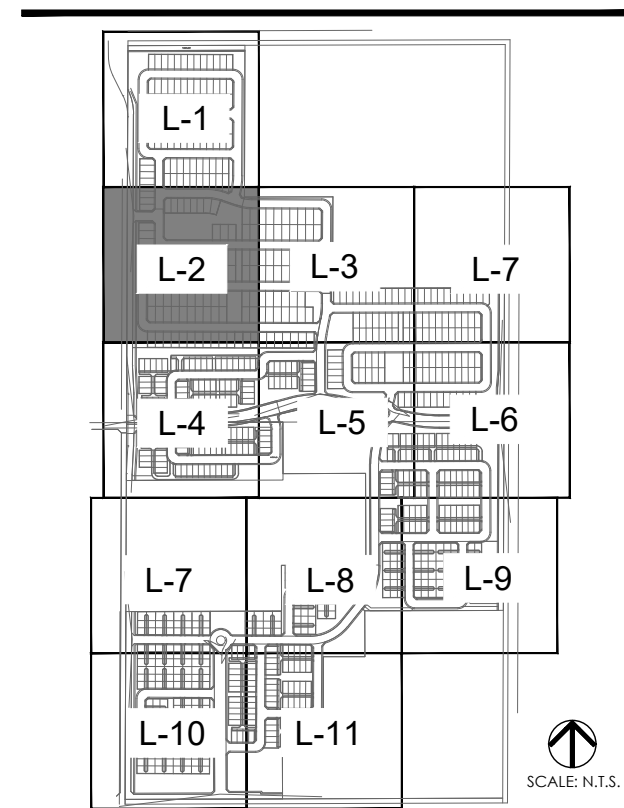
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LEGEND

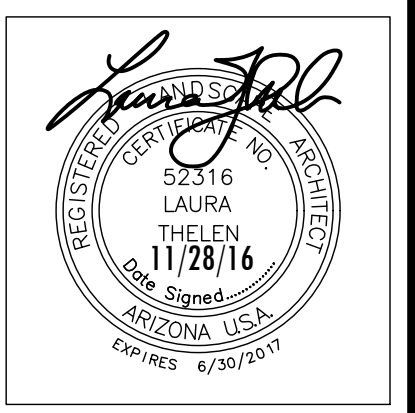
ENHANCED THEME WALL (DETAIL 3, SHT WD-1)	
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PONY WALL (DETAIL 7, SHT WD-1)	
BUILDER WALL	
DOG FENCE (DETAIL 9, SHT WD-1)	
MAILBOX CLUSTER (DETAIL 8, SHT WD-1)	



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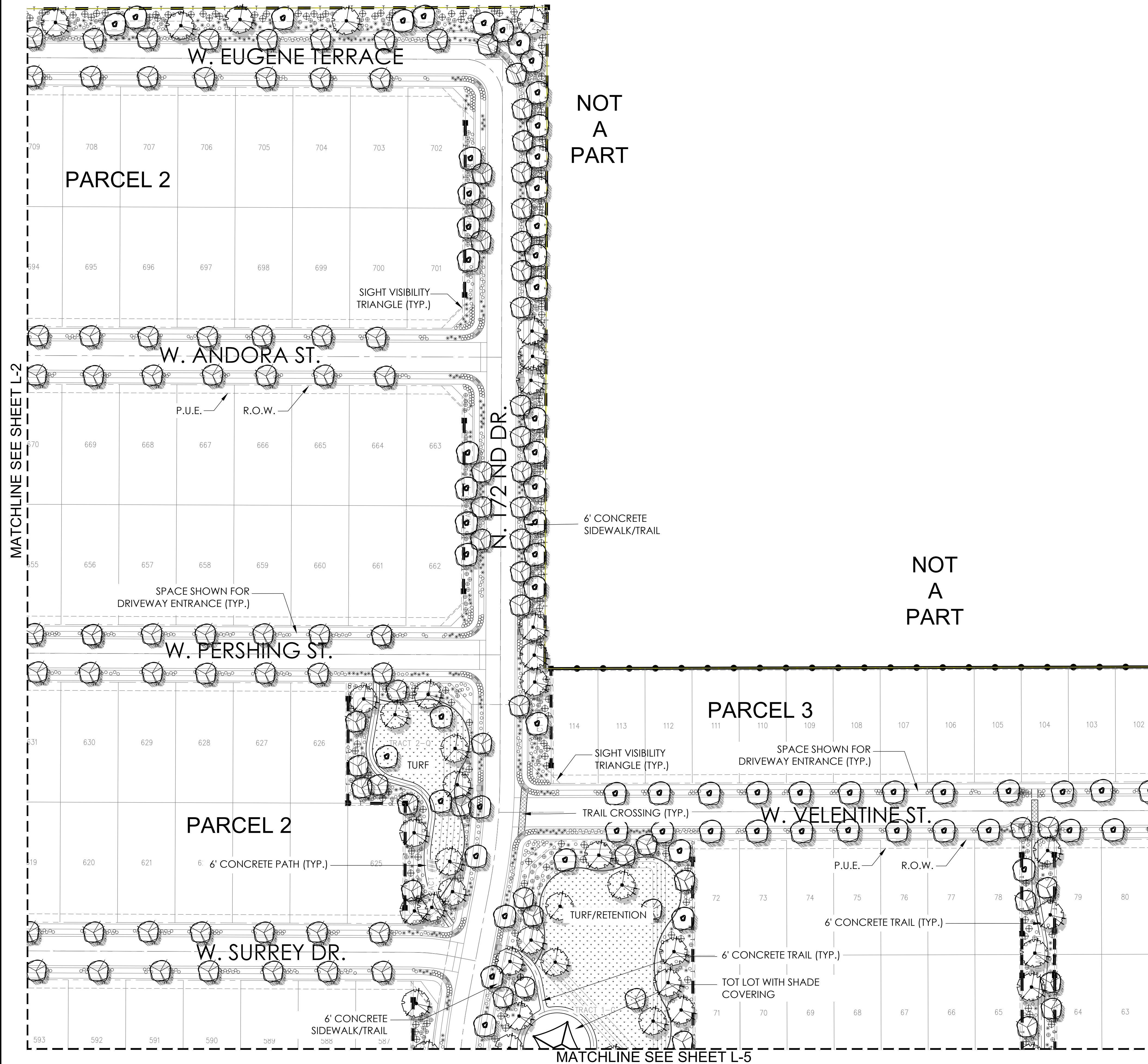
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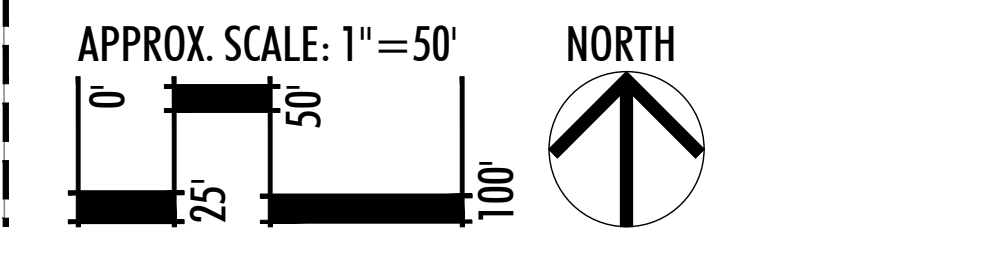
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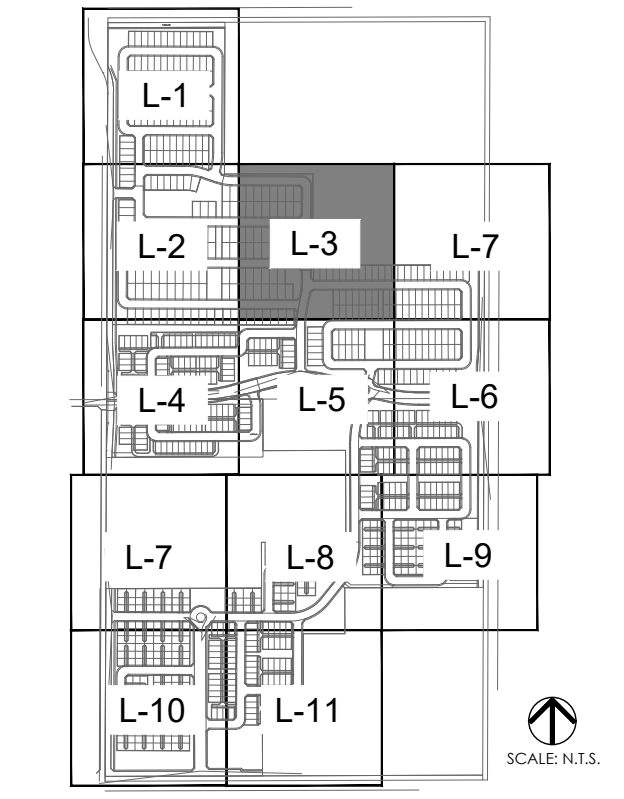
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BUILDER WALL	
DOG FENCE (DETAIL 9, SHT WD-1)	
MAILBOX CLUSTER (DETAIL 8, SHT WD-1)	



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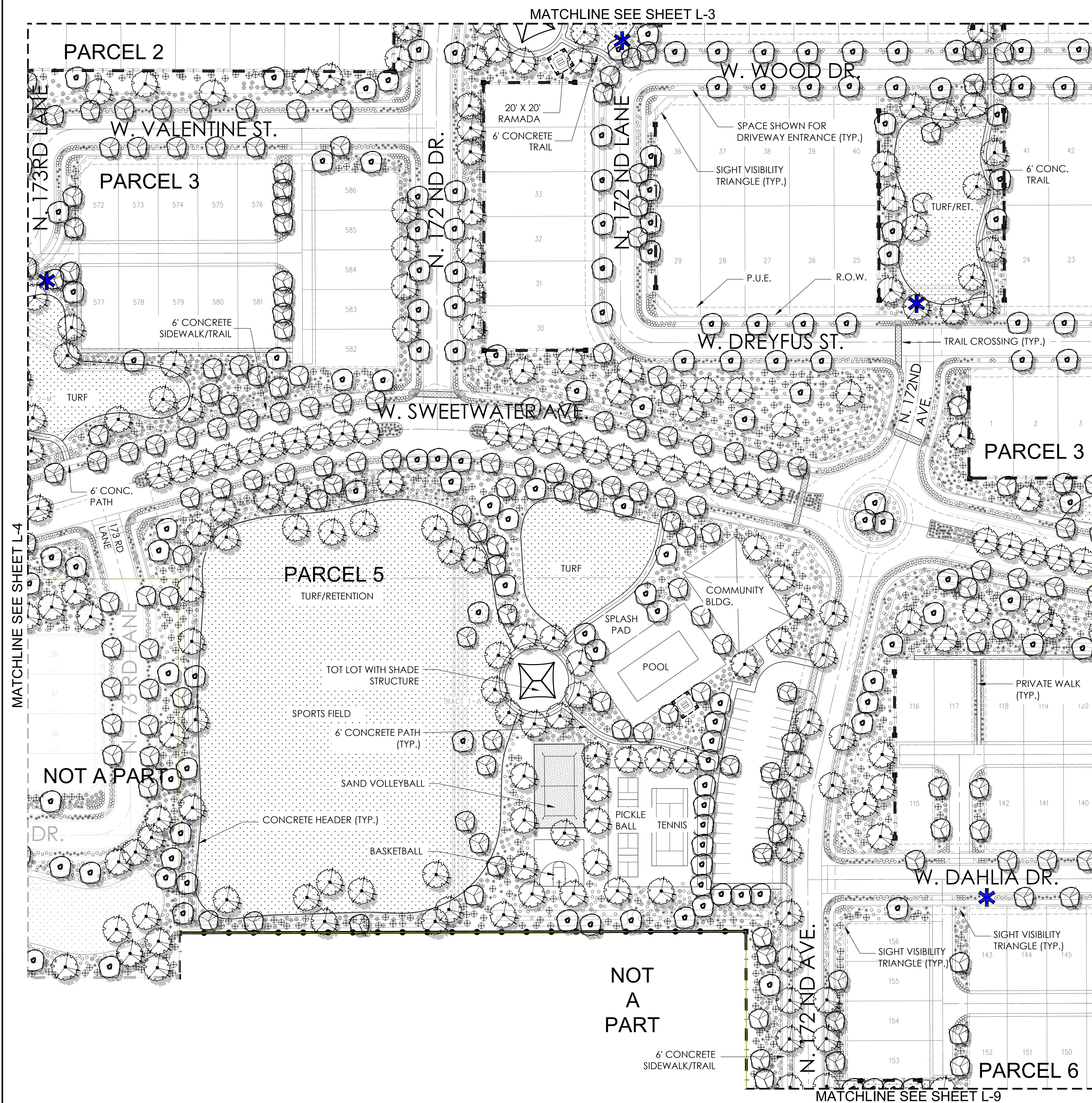
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PRELIMINARY PLANT PALETTE

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Ground Covers: <i>Carissa grandiflora</i> Green Carpet Natal Plum <i>Convolvulus tricolor</i> Dwarf Morning Glory <i>Gazania rigens</i> 'Sun Gold' * Sun Gold * <i>Hedera helix</i> English Ivy <i>Lantana camara</i> 'New Gold' * New Gold Lantana <i>Lantana montevidensis</i> * Purple Trailing Lantana	<i>Lantana montevidensis</i> 'White' * Trailing White Lantana <i>Liriope muscari</i> Lilyturf <i>Pentas lanceolata</i> Egyptian Star <i>Rosmarinus officinalis</i> 'Prostratus' * Prostrate Rosemary <i>Trachelospermum asiaticum</i> Dwarf Star Jasmine <i>Verbena species</i>	<i>Vinca major</i> Vinca Major <i>Zephyranthes sp</i> Rain Lily
Vines: <i>Bougainvillea brasiliensis</i> 'La Jolla' * La Jolla Bougainvillea <i>Gelsemium sempervirens</i> Carolina Jasmine	<i>Grewia occidentalis/caffra</i> Lavender Star Flower <i>Lonicera japonica</i> 'Halliana' Hall's Honeysuckle	<i>Rosa banksiae</i> * Lady Bank's Rose

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LEGEND

ENHANCED THEME WALL (DETAIL 3, SHT WD-1)	
THEME WALL (DETAIL 4, SHT WD-1)	
FULL VIEW FENCE (DETAIL 5, SHT WD-1)	
PARTIAL VIEW FENCE (DETAIL 6, SHT WD-1)	
PONY WALL (DETAIL 7, SHT WD-1)	
BUILDER WALL	
DOG FENCE (DETAIL 9, SHT WD-1)	
MAILBOX CLUSTER (DETAIL 8, SHT WD-1)	

APPROX. SCALE: 1"=50'

NORTH

KEYMAP

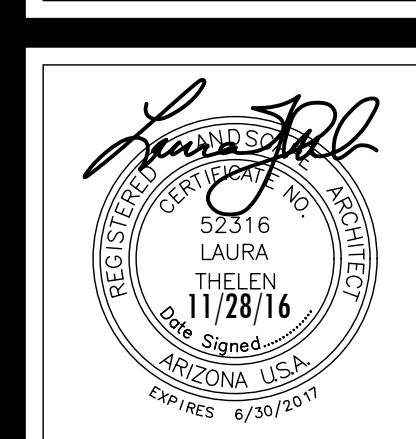
SCALE: N.T.S.

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SURPRISE, ARIZONA

AZ COMMUNITY DEVELOPMENT, LLC.

LANDSCAPE PLAN

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date: 11/28/16

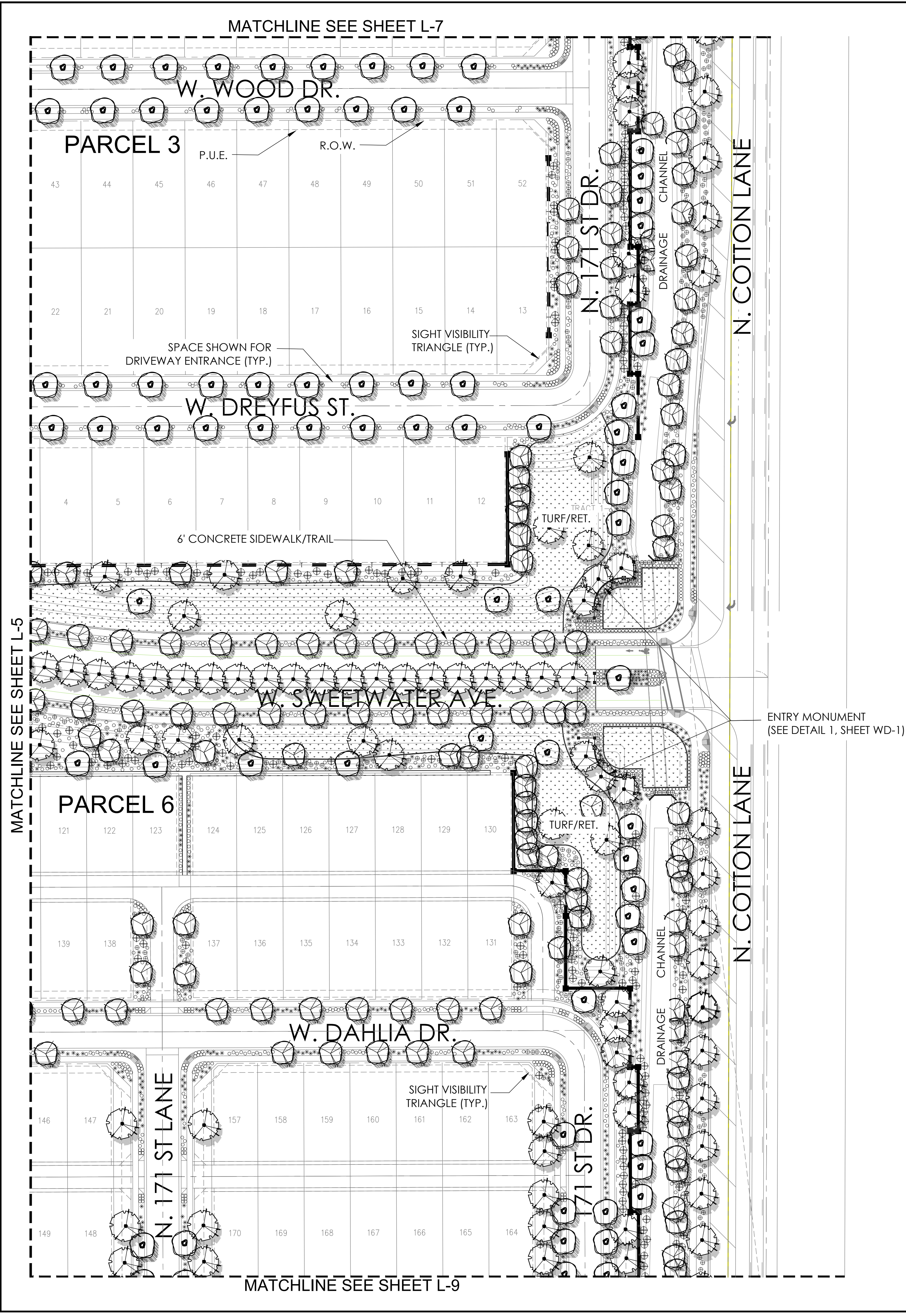
job no.: 1640

drawn: LVA

sheet #

L-5

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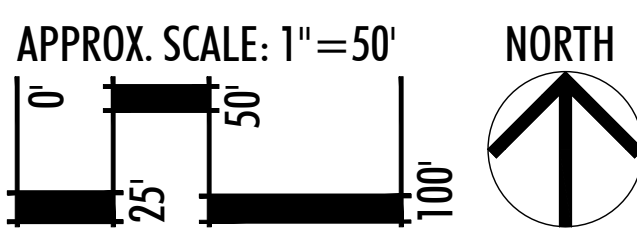
PRELIMINARY PLANT PALETTE

Trees: <i>Acacia aneura</i> Mulga <i>Bauhinia mexicana</i> * Orchid Tree <i>Bauhinia lunarioides</i> * Anacaco Orchid Tree <i>Brachychiton populneus</i> * Bottle Tree <i>Caesalpinia cacalaco</i> Casalote 'Smoothie' <i>Chitalpa tashkentensis</i> 'Pink Dawn' * Chittalpa <i>Citrus calamondin</i> Mandarin Orange <i>Cupressus sempervirens</i> Italian Cypress <i>Dalbergia sissoo</i> * Indian Rosewood <i>Eucalyptus microtheca</i> * Colibah Tree <i>Ficus microcarpa</i> Indian Laurel Fig	<i>Fraxinus uhdei</i> Shamel Ash <i>Fraxinus velutina</i> Arizona Ash <i>Fraxinus velutina</i> 'Fan Tex' Fan Tex Ash <i>Jacaranda mimosfolia</i> Jacaranda <i>Ligustrum lucidum</i> Glossy Privet <i>Magnolia grandiflora</i> <i>Olea europaea</i> 'Swan Hill' Swan Hill Olive <i>Pistachia chinensis</i> 'Red Push' ** Red Push Pistache <i>Quercus virginiana</i> 'Heritage' ** Heritage Live Oak <i>Schinus teribinthifolius</i> Brazilian Pepper Tree <i>Sophora secundiflora</i> ** Texas Mountain Laurel	<i>Thevetia peruviana</i> * Yellow Oleander <i>Tipuana tipu</i> * Tipu Tree <i>Ulmus parvifolia</i> ,cv 'Sempervirens' * Chinese Evergreen Elm <i>Vitex agnus-castus</i> 'Montrose Purple' Chaste Tree
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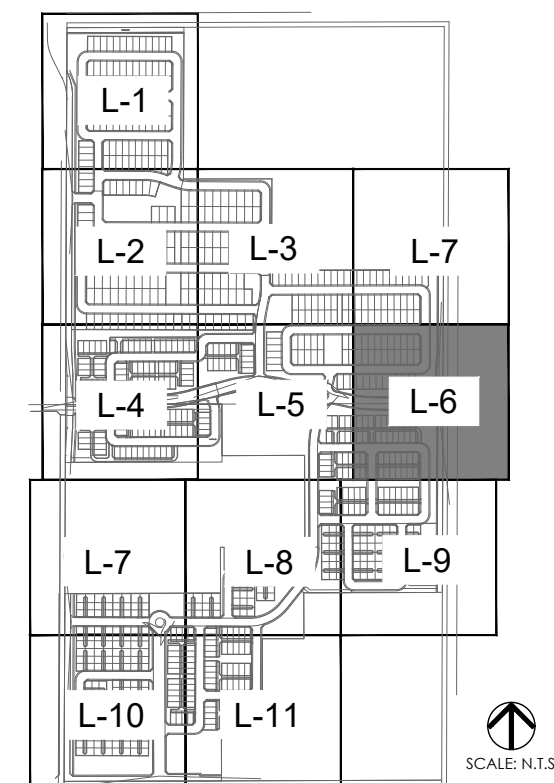
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BUILDER WALL	
DOG FENCE (DETAIL 9, SHT WD-1)	
MAILBOX CLUSTER (DETAIL 8, SHT WD-1)	



KEYMAP

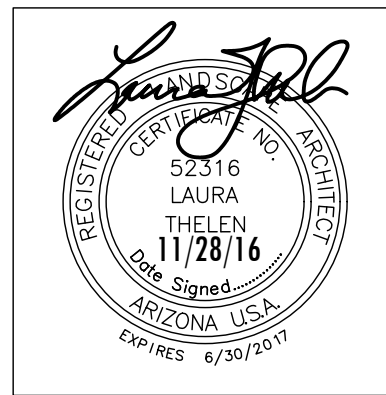


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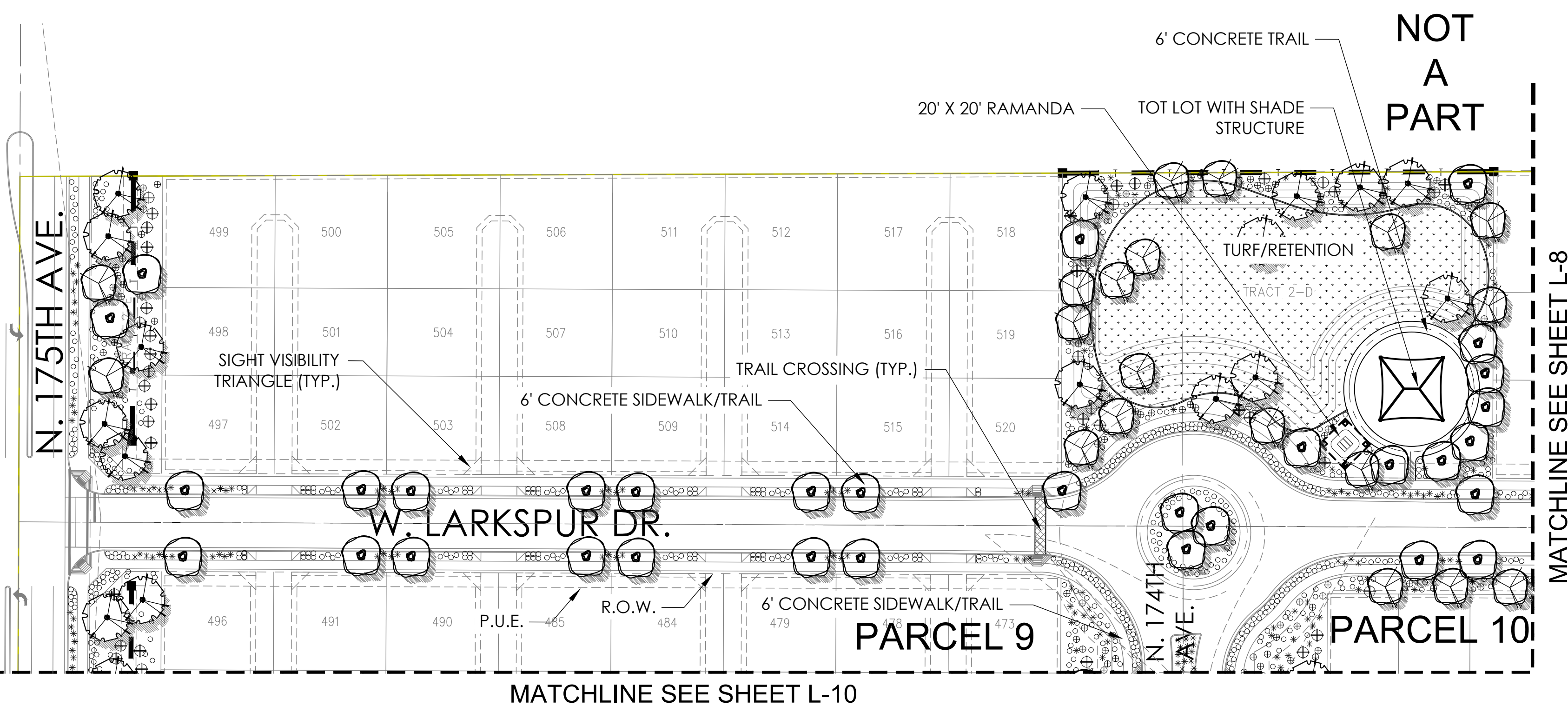
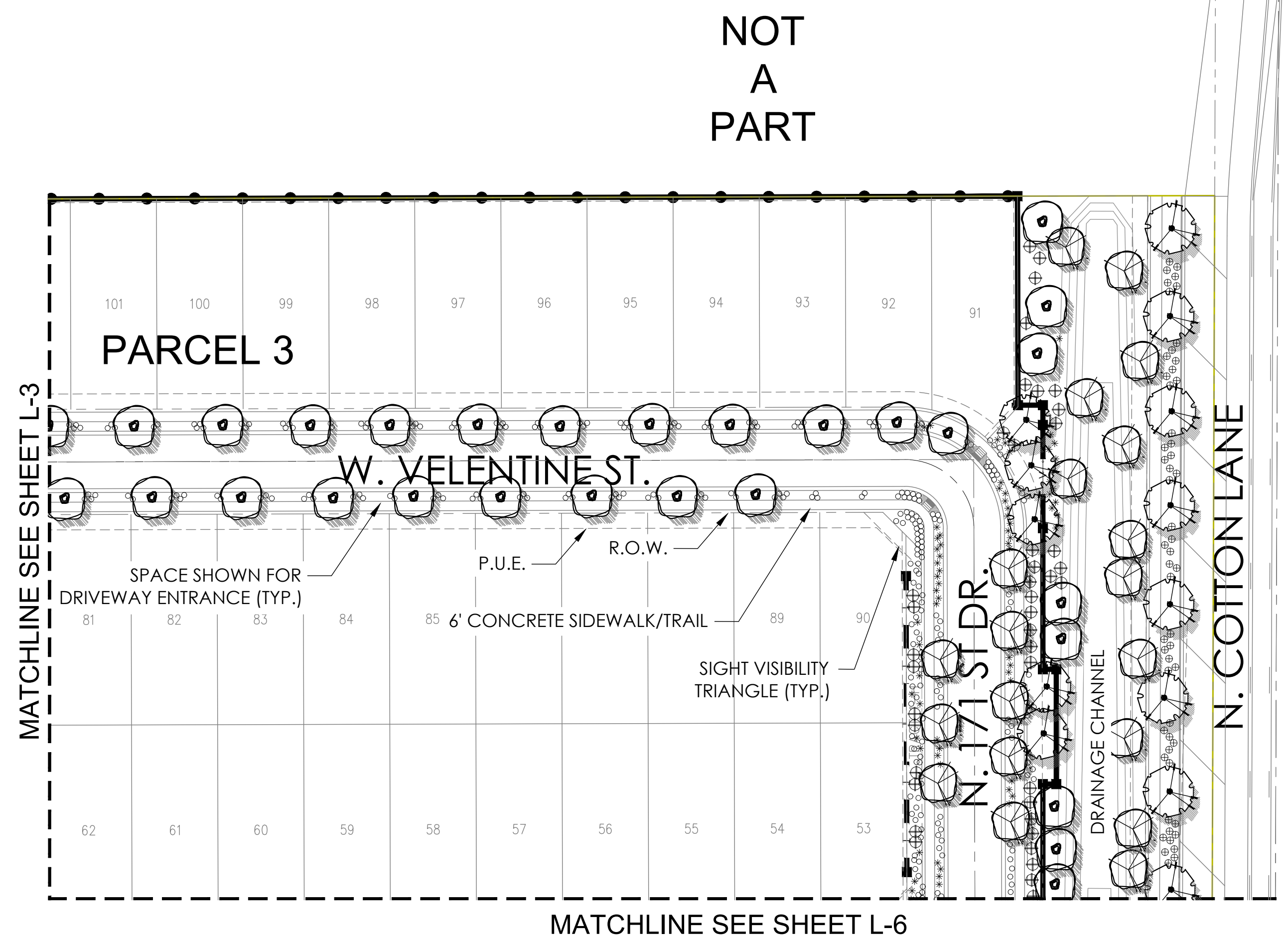
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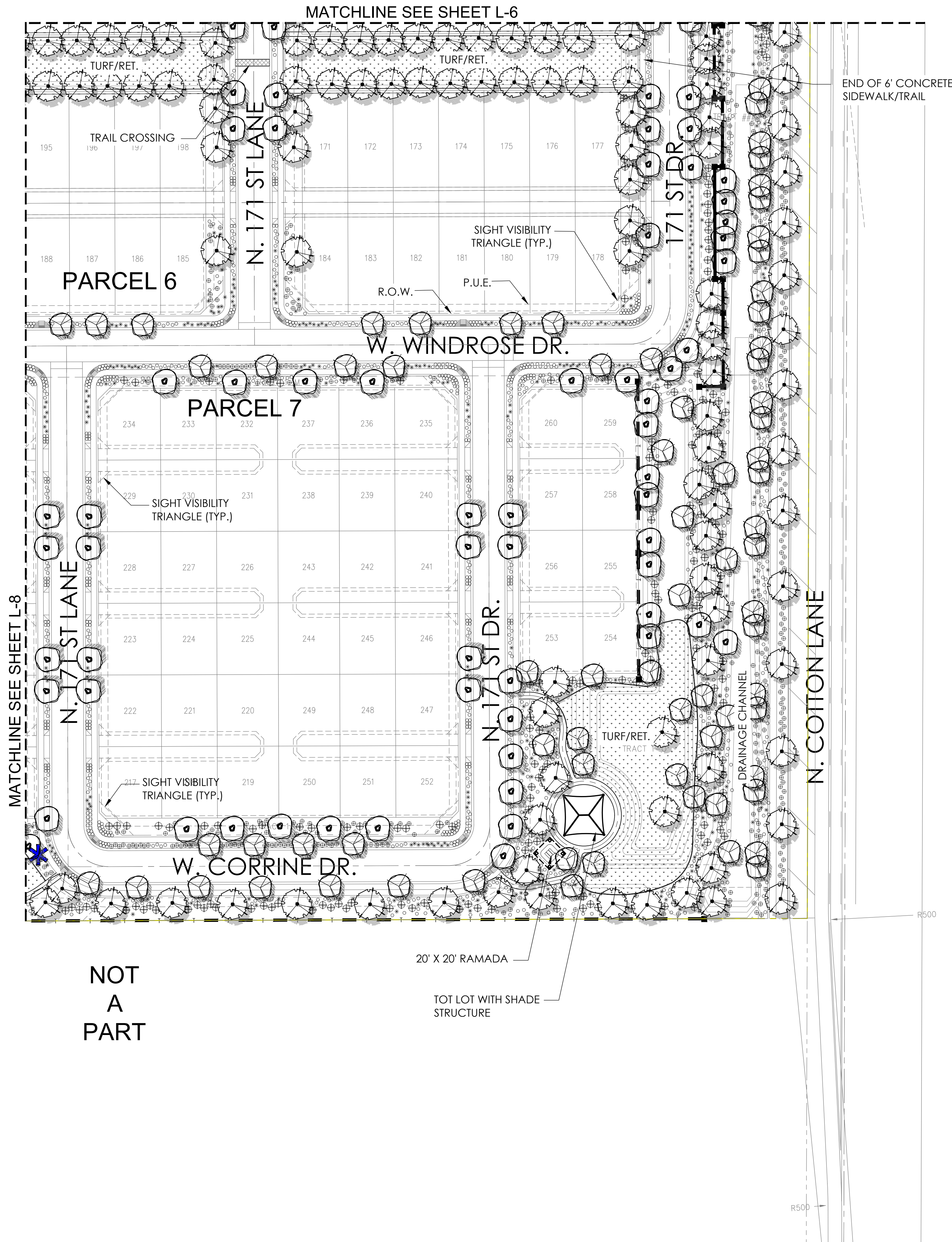
drawn: LVA

sheet #

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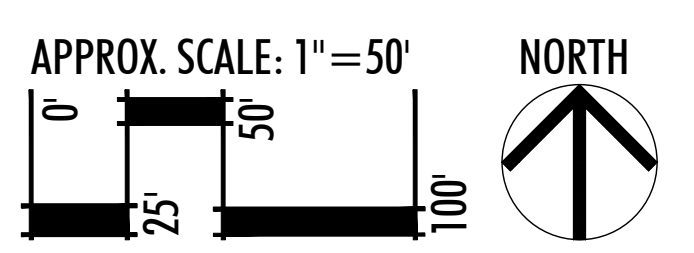
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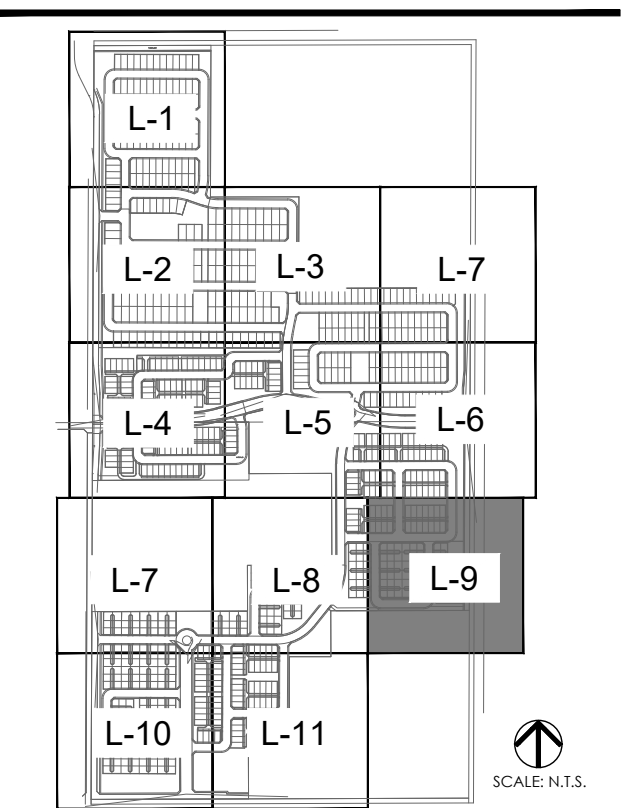
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LEGEND

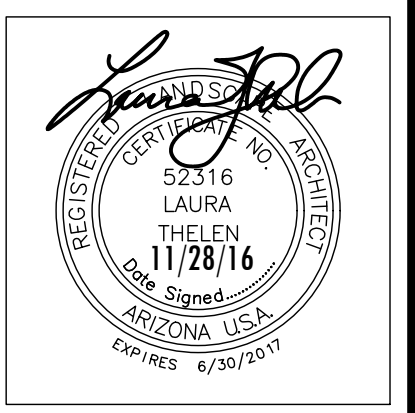
ENHANCED THEME WALL (DETAIL 3, SHT WD-1)	
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PONY WALL (DETAIL 7, SHT WD-1)	
BUILDER WALL	
DOG FENCE (DETAIL 9, SHT WD-1)	
MAILBOX CLUSTER (DETAIL 8, SHT WD-1)	



KEYMAP



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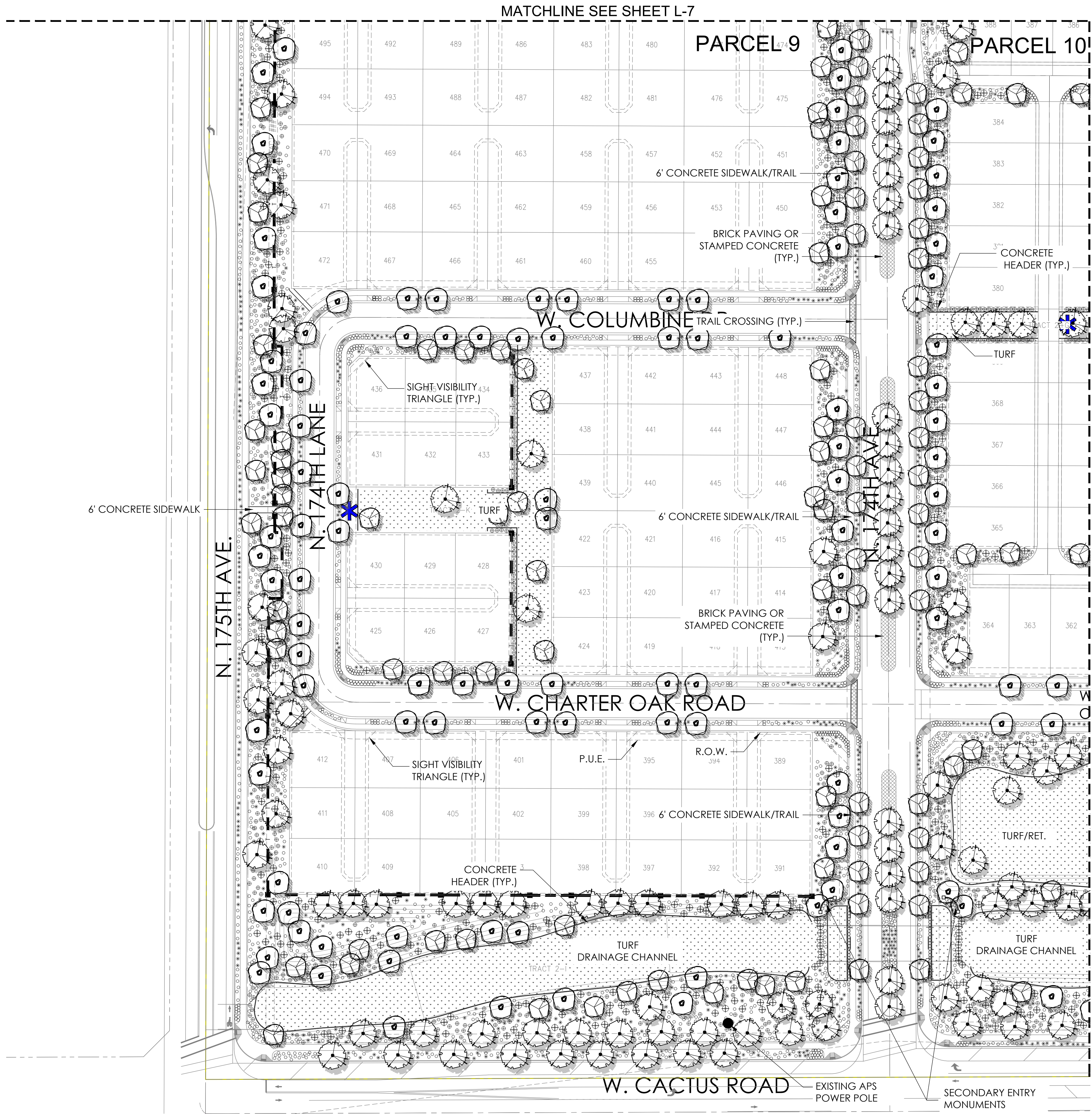
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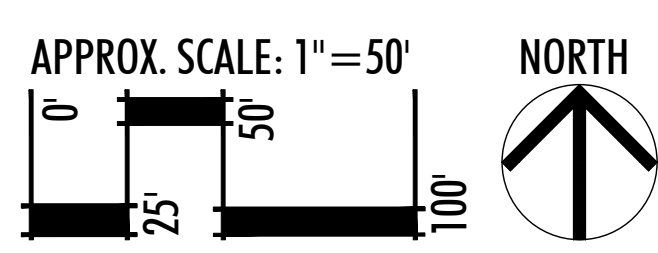
PRELIMINARY PLANT PALETTE

- Trees:**
- Acacia aneura*
 - Mulga
 - Bauhinia mexicana* *
 - Orchid Tree
 - Bauhinia lunarioides* *
 - Anacaco Orchid Tree
 - Brachychiton populneus* *
 - Bottle Tree
 - Caesalpinia cacalaco*
 - Cascalote 'Smoothie'
 - Chitalpa tashkentensis* 'Pink Dawn'
 - Chitalpa
 - Citrus calamondin*
 - Mandarin Orange
 - Cupressus sempervirens*
 - Italian Cypress
 - Dalbergia sissoo* *
 - Indian Rosewood
 - Eucalyptus microtheca* *
 - Colibah Tree
 - Ficus microcarpa*
 - Indian Laurel Fig
 - Fraxinus uhdei*
 - Shamel Ash
 - Fraxinus velutina*
 - Arizona Ash
 - Fraxinus velutina* 'Fan Tex'
 - Fan Tex Ash
 - Jacaranda mimosifolia*
 - Jacaranda
 - Ligustrum lucidum*
 - Glossy Privet
 - Magnolia grandiflora*
 - Olea europaea* 'Swan Hill'
 - Swan Hill Olive
 - Pistacia chinensis* 'Red Push' **
 - Red Push Pistache
 - Quercus virginiana*
 - 'Heritage' **
 - Heritage Live Oak
 - Schinus terbinthifolius*
 - Brazilian Pepper Tree
 - Sophora secundiflora* **
 - Texas Mountain Laurel
 - Thevetia peruviana* *
 - Yellow Oleander
 - Tipuana tipu* *
 - Tipu Tree
 - Ulmus parvifolia* ,cv
 - 'Sempervirens' *
 - Chinese Evergreen Elm
 - Vitex agnus-castus* 'Montrose Purple'
 - Chaste Tree
- Shrubs:**
- Buxus japonica* 'Green Beauty'
 - Japanese Boxwood
 - Callistemon citrinus* 'Little John' *
 - Little John Bottlebrush
 - Carissa micocarpa*
 - 'Boxwood Beauty'
 - Boxwood Beauty Natal Plum
 - Chrysactinia mexicana*
 - Damianita *
 - Dietes bicolor*
 - Fortnight Lily
 - Eremophila maculata*
 - 'Valentine' *
 - Emu Bush
 - Feijoa sellowiana*
 - Pinnacle Guava
 - Gardenia jasminoides*
 - Gardenia
 - Hibiscus rosa-sinensis*
 - Chinese Hibiscus
 - Ilex vomitoria* 'Stokes'
 - Dwarf Yaupon
 - Ligustrum japonicum*
 - Japanese Privet
 - Muhlenbergia rigens* *
 - Deer Grass
 - Myrtus communis*
 - 'Compacta' *
 - Dwarf Myrtle
 - Nandina domestica*
 - 'Compacta' *
 - Osmanthus fragrans*
 - Sweet Olive
 - Photinia fraseri*
 - Red Photinia
 - Plumbago auriculata* *
 - Cape Plumbago
 - Pyracantha koidzumii*
 - 'Santa Cruz' **
 - Santa Cruz Prostrata
 - Raphiolepis indica*
 - 'Ballerina'
 - Ballerina
 - Hesperaloe parviflora* *
 - Red yucca
 - Yucca bacata* *
 - Banana Yucca
 - Yucca gloriosa* *
 - Spanish Dagger
 - Yucca recurvifolia* *
 - Pendulous Yucca
 - Vinca major*
 - Vinca Major
 - Zephyranthes sp*
 - Rain Lily
- Accents:**
- Cycas revoluta* *
 - Sago Palm
 - Guara lindheimeri*
 - Lindheimer's beeblossom
- Ground Covers:**
- Carissa grandiflora*
 - Green Carpet' Natal Plum
 - Convolvulus tricolor*
 - Dwarf Morning Glory
 - Gazania rigens* 'Sun Gold' *
 - Sun Gold *
 - Hedera helix*
 - English Ivy
 - Lantana camara* 'New Gold' **
 - New Gold Lantana
 - Lantana montevidensis* *
 - Purple Trailing Lantana
 - Lantana montevidensis*
 - 'White' *
 - Trailing White Lantana
 - Liriope muscari*
 - Lilyturf
 - Pentas lanceolata*
 - Egyptian Star
 - Rosmarinus officinalis*
 - 'Prostratus' *
 - Prostrate Rosemary
 - Trachelospermum asiaticum*
 - Dwarf Star Jasmine
 - Verbena species*
 - Grewia occidentalis/caffra*
 - Lavender Star Flower
 - Lonicera japonica*
 - 'Haltiana'
 - Hall's Honeysuckle
 - Rosa banksiae* *
 - Lady Bank's Rose
- Vines:**
- Bougainvillea brasiliensis*
 - 'La Jolla' *
 - La Jolla Bougainvillea
 - Gelsemium sempervirens*
 - Carolina Jasmine

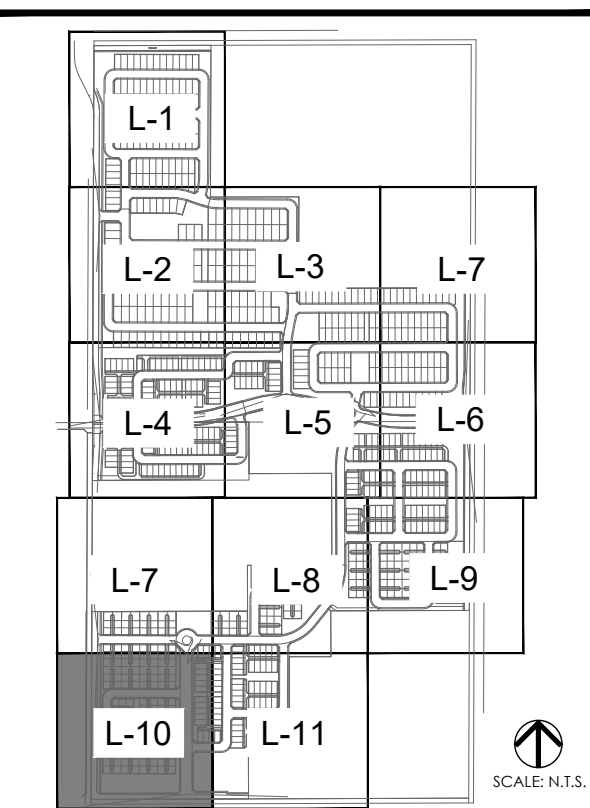
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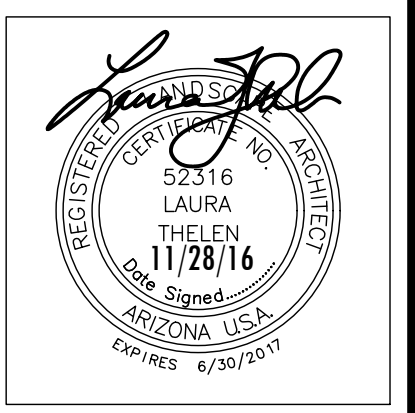
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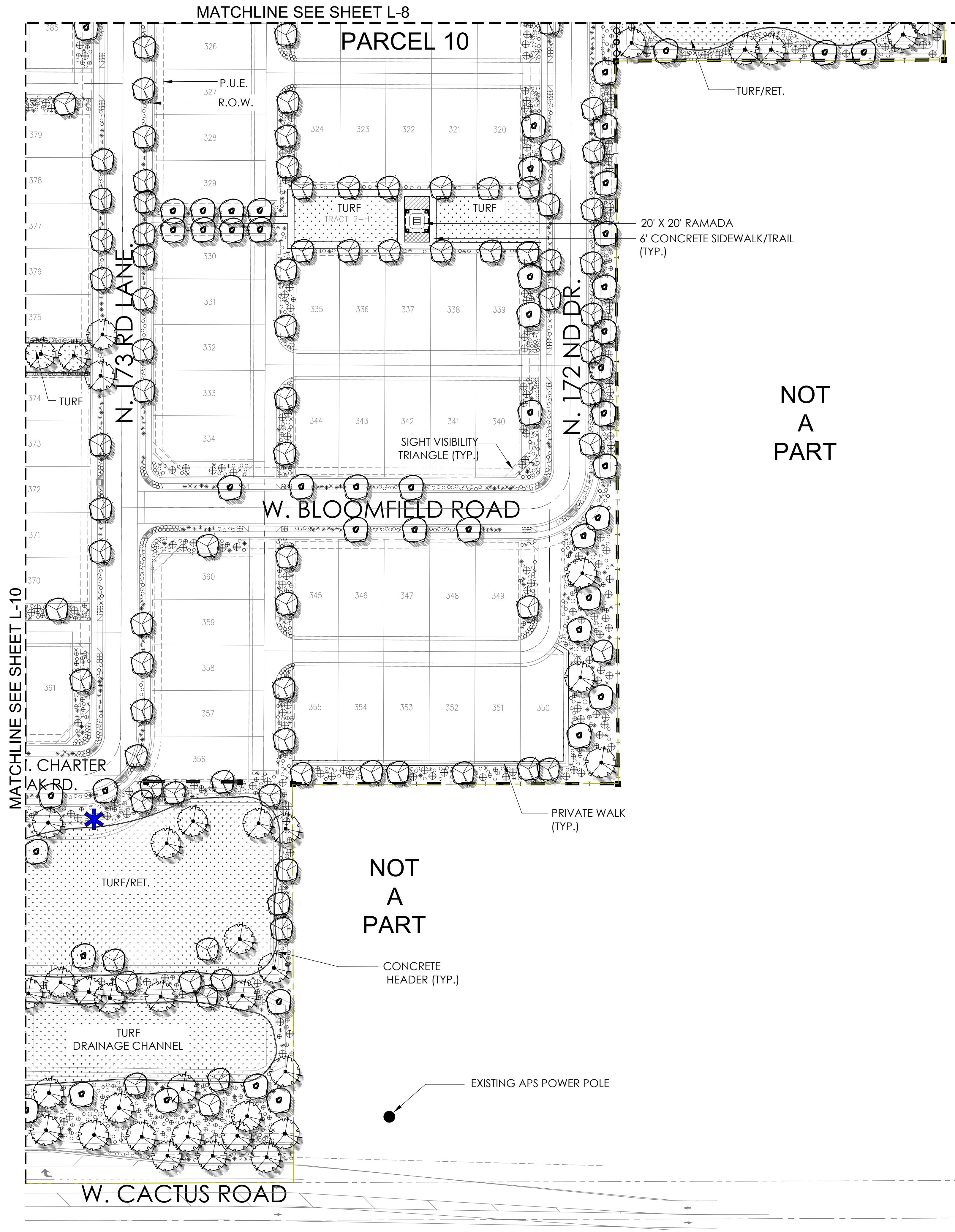
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L-10
11 of 16



PRELIMINARY PLANT PALETTE

Trees: <i>Acacia aneura</i> Mulga <i>Bauhinia mexicana</i> * Orchid Tree <i>Bauhinia lunarioides</i> * Anacaco Orchid Tree <i>Brachychiton populneus</i> * Bottle Tree <i>Caesalpinia cacalaco</i> Casalote 'Smoothie' <i>Chitalpa tashkentensis</i> 'Pink Dawn' * Chitalpa <i>Citrus calamondin</i> Mandarin Orange <i>Cupressus sempervirens</i> Italian Cypress <i>Dalbergia sissoo</i> * Indian Rosewood <i>Eucalyptus microtheca</i> * Colibah Tree <i>Ficus microcarpa</i> Indian Laurel Fig	<i>Fraxinus uhdei</i> Shamel Ash <i>Fraxinus velutina</i> Arizona Ash <i>Fraxinus velutina</i> 'Fan Tex' Fan Tex Ash <i>Jacaranda mimosfolia</i> Jacaranda <i>Ligustrum lucidum</i> Glossy Privet <i>Magnolia grandiflora</i> <i>Olea europaea</i> 'Swan Hill' Swan Hill Olive <i>Pistacia chinensis</i> 'Red Push' ** Red Push Pistache <i>Quercus virginiana</i> 'Heritage' ** Heritage Live Oak <i>Schinus terbinthifolius</i> Brazilian Pepper Tree <i>Sophora secundiflora</i> ** Texas Mountain Laurel	<i>Thevetia peruviana</i> * Yellow Oleander <i>Tipuana tipu</i> * Tipu Tree <i>Ulmus parvifolia</i> ,cv 'Sempervirens' * Chinese Evergreen Elm <i>Vitex agnus-castus</i> 'Montrose Purple' Chaste Tree
Shrubs: <i>Buxus japonica</i> 'Green Beauty' Japanese Boxwood <i>Callistemon citrinus</i> 'Little John' * Little John Bottlebrush <i>Carissa micorcarpa</i> 'Boxwood Beauty' Boxwood Beauty Natal Plum <i>Chrysactinia mexicana</i> Damianita * <i>Dietes bicolor</i> Fortnight Lily <i>Eremophila maculata</i> 'Valentine' * Emu Bush <i>Feijoa sellowiana</i> Pinnacle Guava <i>Gardenia jasminoides</i> Gardenia <i>Hibiscus rosa-sinensis</i> Chinese Hibiscus	<i>Ilex vomitoria</i> 'Stokes' Dwaft Yaupon <i>Ligustrum japonicum</i> Japanese Privet <i>Muhlenbergia rigens</i> * Deer Grass <i>Myrtus communis</i> 'Compacta' * Dwarf Myrtle <i>Nandina domestica</i> Compacta * <i>Osmanthus fragrans</i> Sweet Olive <i>Photinia fraseri</i> Red Photinia <i>Plumbago auriculata</i> * Cape Plumbago <i>Pyracantha koidzumii</i> 'Santa Cruz' * Santa Cruz Prostrata <i>Raphiolepis indica</i> 'Ballerina' Ballerina	<i>Simmondsia chinensis</i> Jojoba <i>Tecoma stans</i> 'Orange Jubilee' Arizona Yellow Bells <i>Vauquelinia californica</i> * Arizona Rosewood
Accents: <i>Cycas revoluta</i> * Sago Palm <i>Guara lindheimeri</i> Lindheimer's beeblossom	<i>Hesperaloe parviflora</i> * Red yucca <i>Yucca bacata</i> * Banana Yucca	<i>Yucca gloriosa</i> * Spanish Dagger <i>Yucca recurvifolia</i> * Pendulous Yucca
Ground Covers: <i>Carissa grandiflora</i> Green Carpet' Natal Plum <i>Convolvulus tricolor</i> Dwarf Morning Glory <i>Gazania rigens</i> 'Sun Gold' ' * Sun Gold * <i>Hedera helix</i> English Ivy <i>Lantana camera</i> 'New Gold' * New Gold Lantana <i>Lantana montevidensis</i> * Purple Trailing Lantana	<i>Lantana montevidensis</i> 'White' * Trailing White Lantana <i>Liriope muscari</i> Lilyturf <i>Pentas lanceolata</i> Egyptian Star <i>Rosmarinus officinalis</i> 'Prostratus' * Prostrate Rosemary <i>Trachelospermum asiaticum</i> Dwarf Star Jasmine <i>Verbena species</i>	<i>Vinca major</i> Vinca Major <i>Zephyranthes sp</i> Rain Lily
Vines <i>Bougainvillea brasiliensis</i> 'La Jolla' * La Jolla Bougainvillea <i>Gelsemium sempervirens</i> Carolina Jasmine	<i>Grewia occidentalis/caffra</i> Lavender Star Flower <i>Lonicera japonica</i> 'Halliana' Hall's Honeysuckle	<i>Rosa banksiae</i> * Lady Bank's Rose

- Notes:
- * Plants on the ADWR Low Water Use Drought Tolerant plant list.
 - ** Plant species that are approved for use in public right-of-way per EDS 8.1.4.
 - Plants with an invasive root system will not be planted near sidewalks, pavements, wall, etc. and are indicated by **bold type and underline**.
 - Trees with erect growth habit within the right-of-way or adjacent to any sidewalk shall have their main vertical leader intact and shall remained unclipped.

LEGEND

ENHANCED THEME WALL (DETAIL 3, SHT WD-1)

THEME WALL (DETAIL 4, SHT WD-1)

FULL VIEW FENCE (DETAIL 5, SHT WD-1)

PARTIAL VIEW FENCE (DETAIL 6, SHT WD-1)

PONY WALL (DETAIL 7, SHT WD-1)

BUILDER WALL

DOG FENCE (DETAIL 9, SHT WD-1)

MAILBOX CLUSTER (DETAIL 8, SHT WD-1)

KEYMAP

APPROX. SCALE: 1"=50'

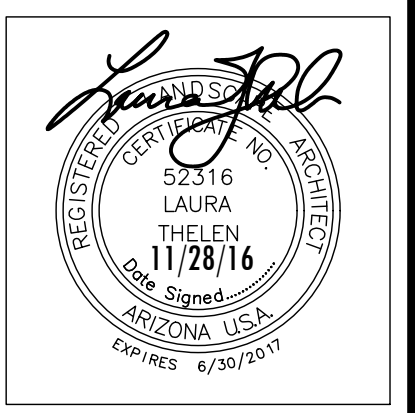
NORTH

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MAGNOLIA

PRELIMINARY LANDSCAPE PLAN

SURPRISE, ARIZONA

AZ COMMUNITY DEVELOPMENT, LLC.

LANDSCAPE PLAN

revision date

Call Two Working Days Before You Dig

602-263-1100

1-800-STAKE-IT

(Outside Maricopa County)

date: 11/28/16

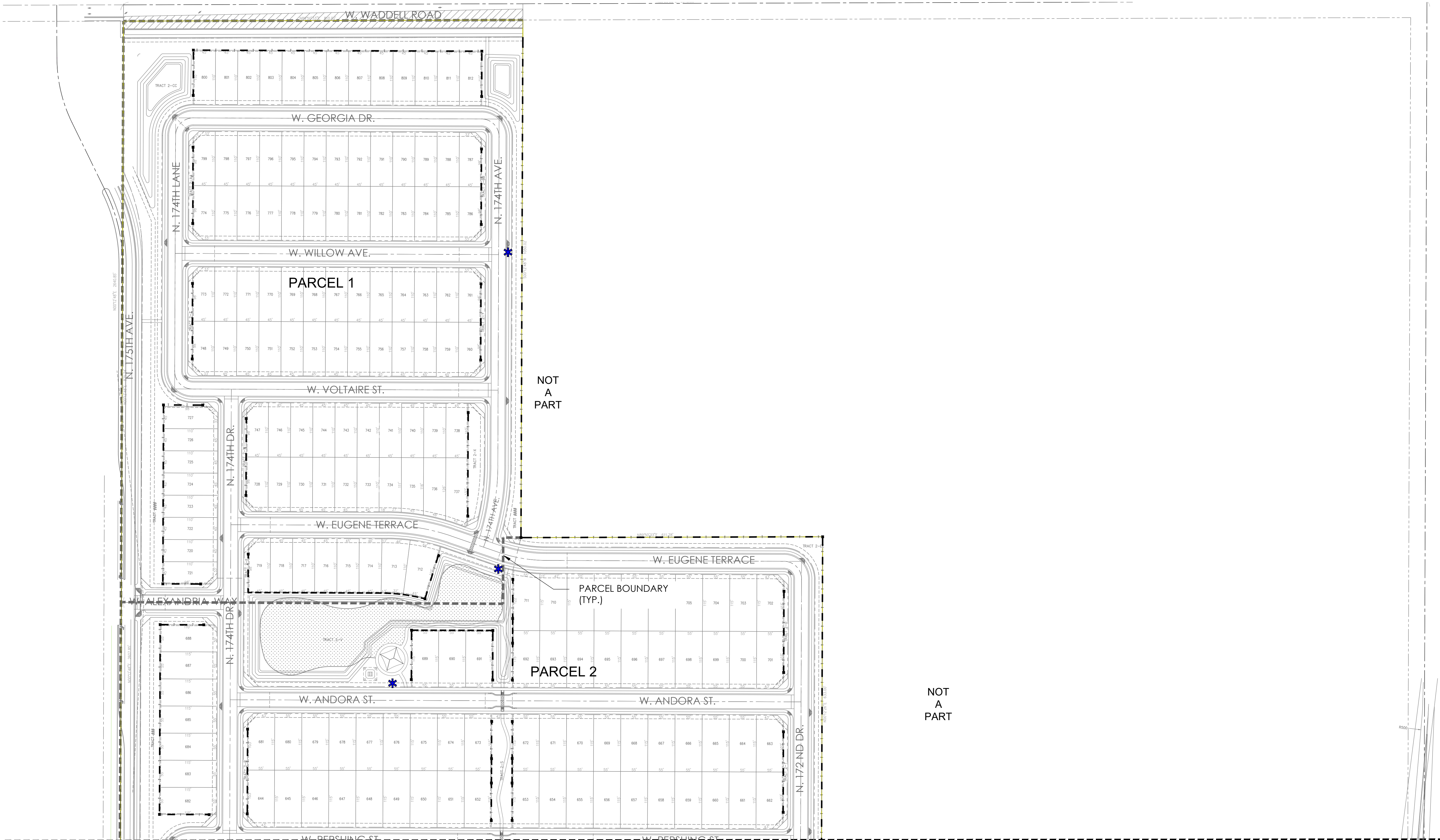
job no.: 1640

drawn: LVA

sheet #

L-11

12 of 16

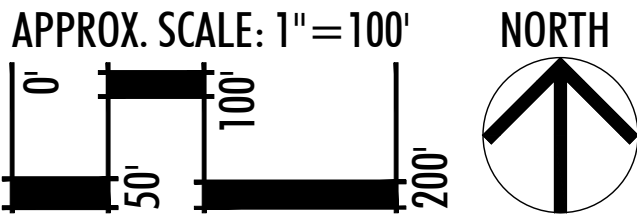


MATCHLINE SEE SHEET W-2

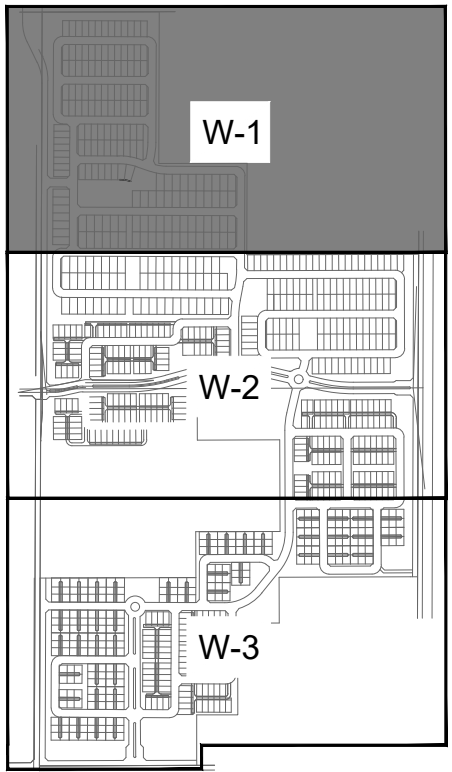
- NOTE:**
- 1. ALL MAILBOX LOCATIONS AND SIZES ARE PRELIMINARY AND ARE SUBJECT TO FINAL APPROVAL BY THE U.S.P.S.
 - 2. ADEQUATE LIGHTING FIXTURES WILL BE PROVIDED IN MAILBOX LOCATIONS. DETAILS TO BE PROVIDED WITH FINAL PLANS.

LEGEND

- ENHANCED THEME WALL (DETAIL 3, SHT WD-1)
- THEME WALL (DETAIL 4, SHT WD-1)
- FULL VIEW FENCE (DETAIL 5, SHT WD-1)
- PARTIAL VIEW FENCE (DETAIL 6, SHT WD-1)
- PONY WALL (DETAIL 7, SHT WD-1)
- BUILDER WALL
- DOG FENCE (DETAIL 9, SHT WD-1)
- MAILBOX CLUSTER (DETAIL 8, SHT WD-1)



KEYMAP



SCALE: N.T.S.

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MAGNOLIA

PRELIMINARY LANDSCAPE PLAN

SURPRISE, ARIZONA

AZ COMMUNITY DEVELOPMENT, LLC.

WALL & MAILBOX PLAN

revision	date

Call Two Working Days Before You Dig

602-263-1100

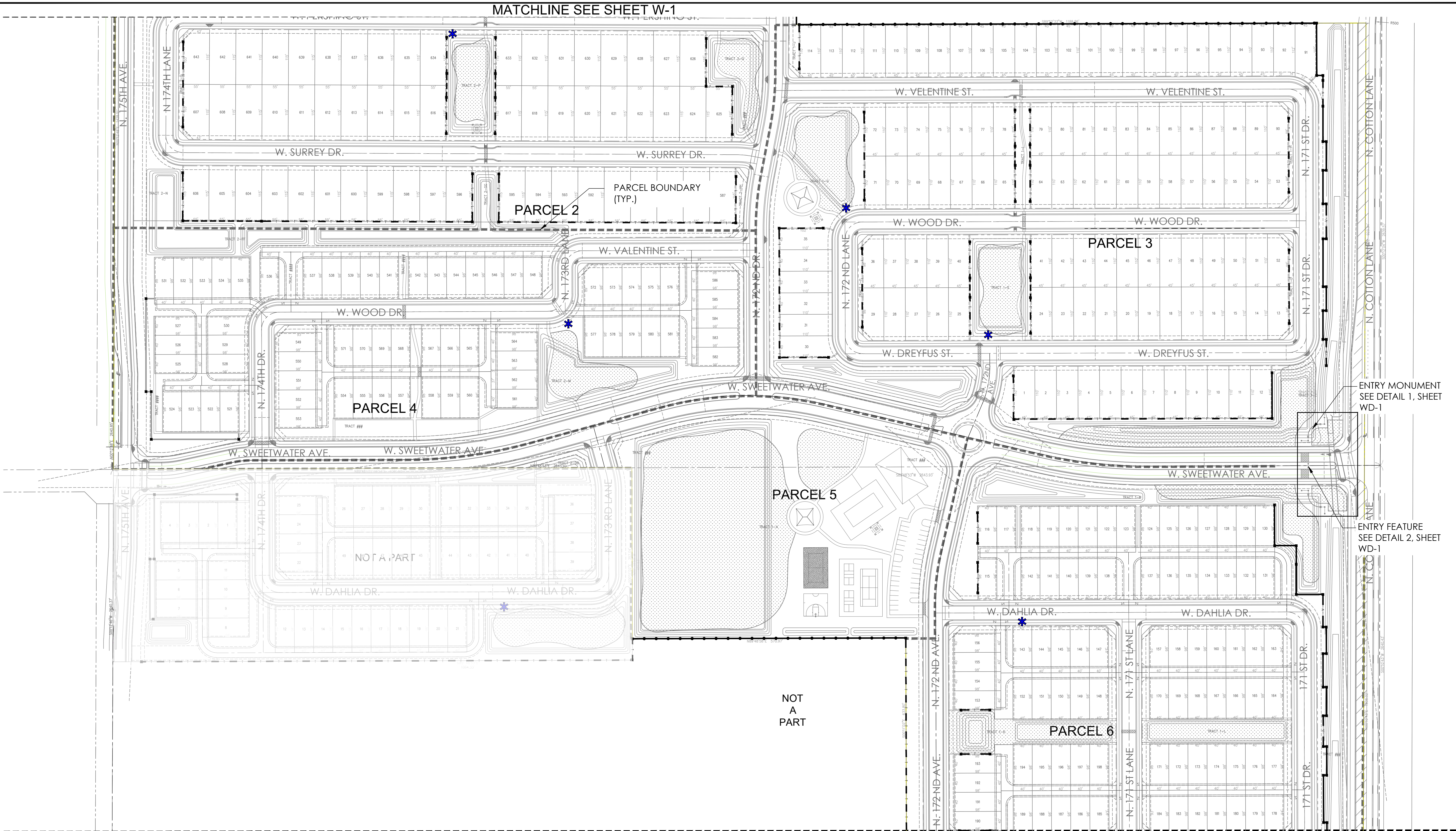
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(Outside Maricopa County)

date: 11/28/16
job no.: 1640
drawn: LVA
sheet #

W-1

13 of 16



NOTE:

- ALL MAILBOX LOCATIONS AND SIZES ARE PRELIMINARY AND ARE SUBJECT TO FINAL APPROVAL BY THE U.S.P.S.
- ADEQUATE LIGHTING FIXTURES WILL BE PROVIDED IN MAILBOX LOCATIONS. DETAILS TO BE PROVIDED WITH FINAL PLANS.

LEGEND

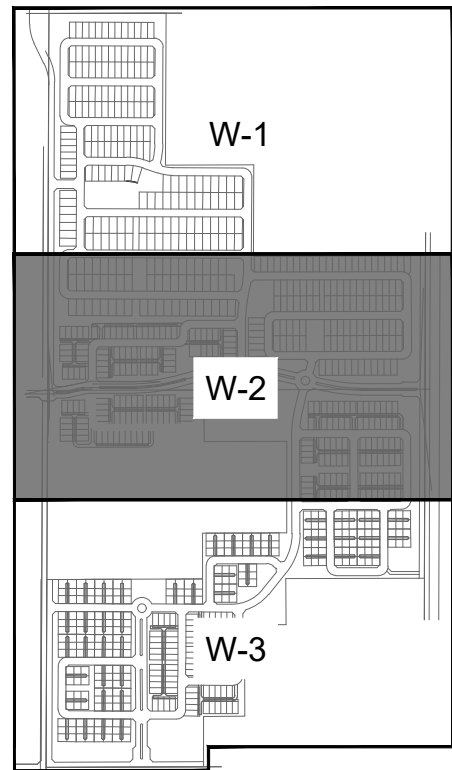
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- THEME WALL (DETAIL 4, SHT WD-1)
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- PONY WALL (DETAIL 7, SHT WD-1)
- BUILDER WALL
- DOG FENCE (DETAIL 9, SHT WD-1)
- MAILBOX CLUSTER (DETAIL 8, SHT WD-1)

APPROX. SCALE: 1"=100'

50' 100' 200'



KEYMAP



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MAGNOLIA
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
AZ COMMUNITY DEVELOPMENT, LLC.

WALL &
MAILBOX
PLAN

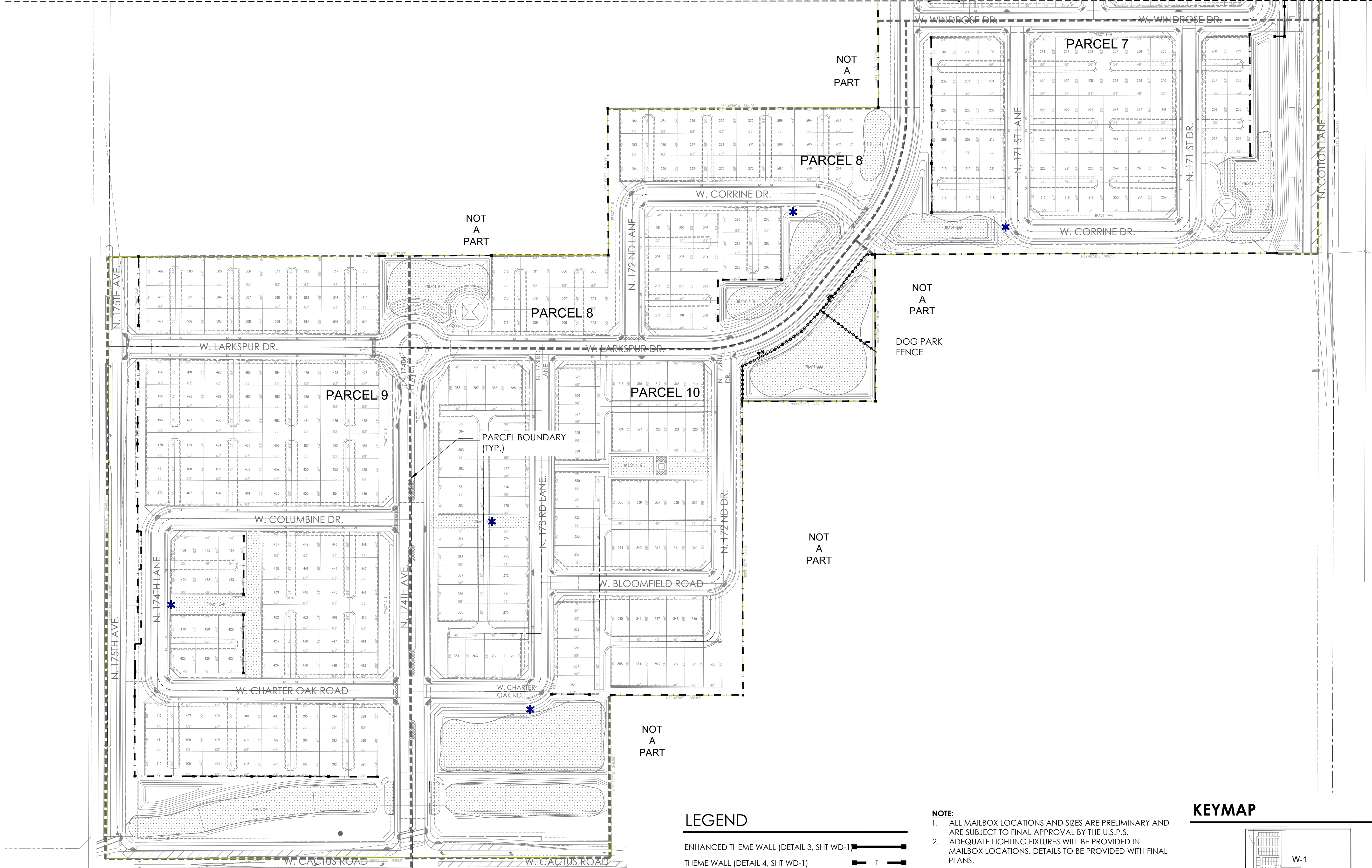
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1-800-STAKE-IT
(Outside Maricopa County)

date: 11/28/16
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drawn: LVA
sheet #

W-2
14 of 16

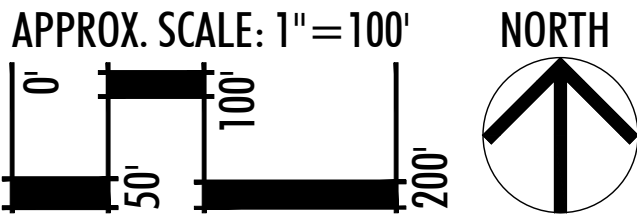
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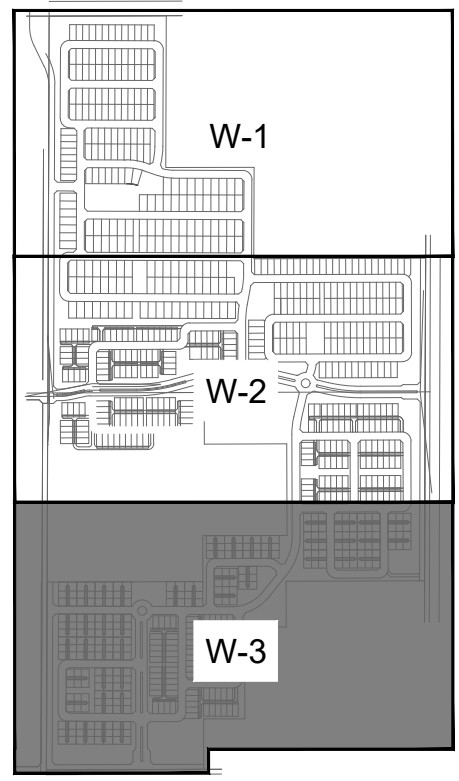
LEGEND

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KEYMAP



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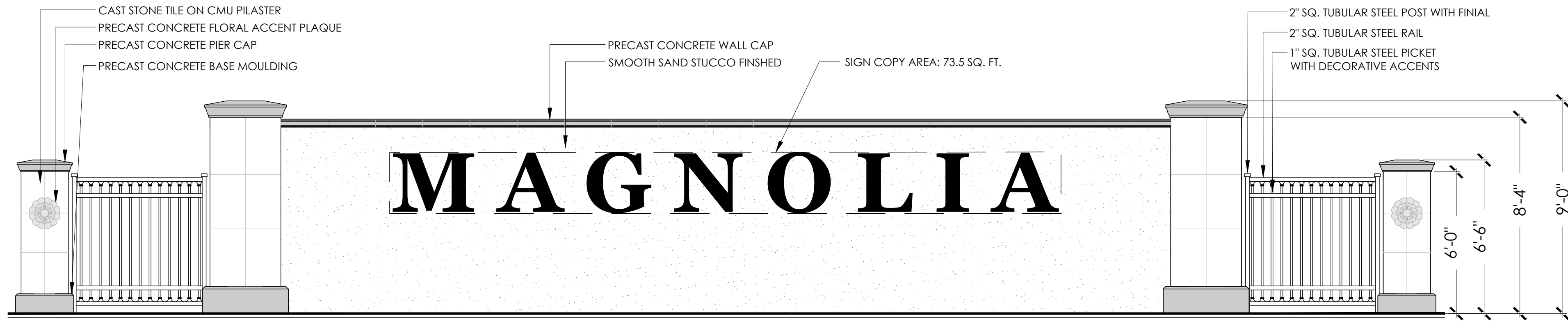
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PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
AZ COMMUNITY DEVELOPMENT, LLC.

WALL &
MAILBOX
PLAN

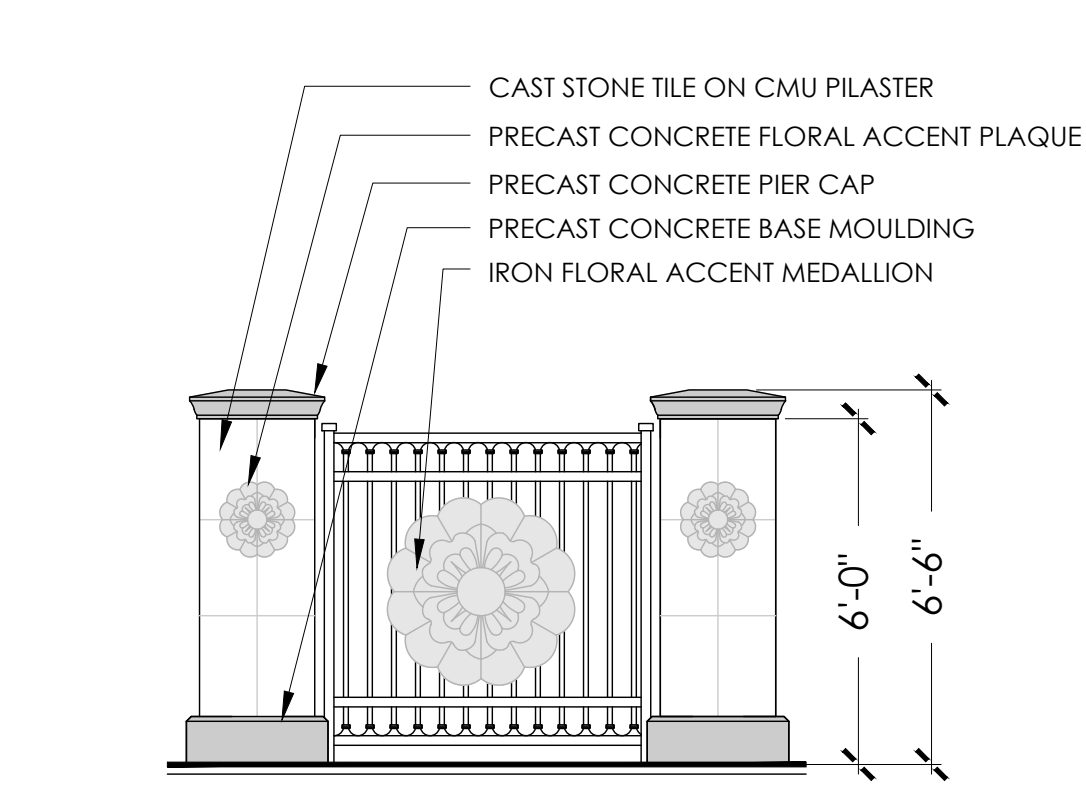
revision	date

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1-800-STAKE-IT
(Outside Maricopa County)

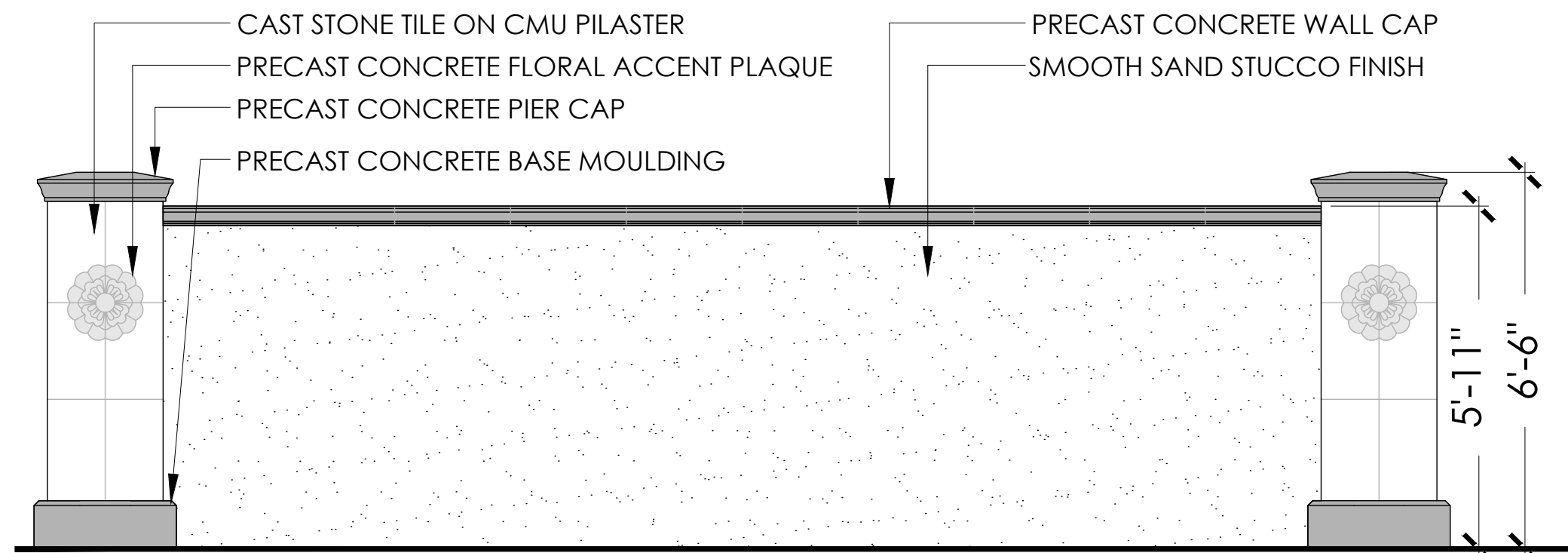
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sheet #
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15 of 16



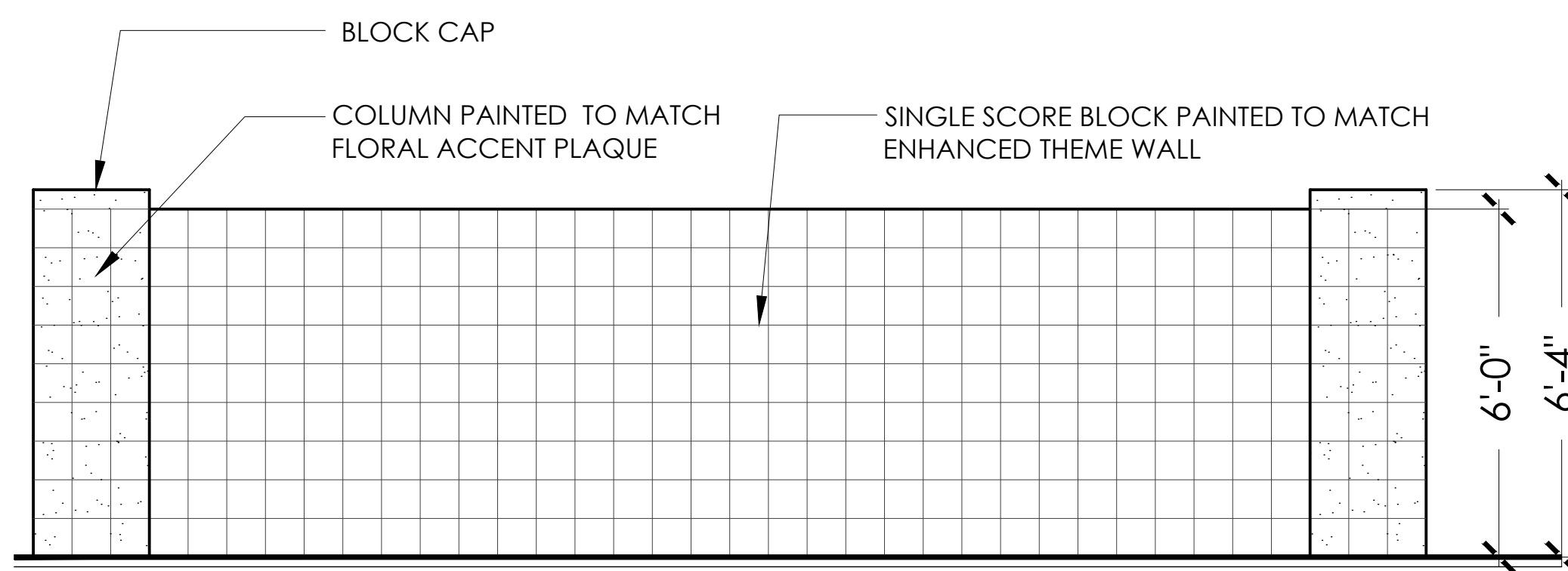
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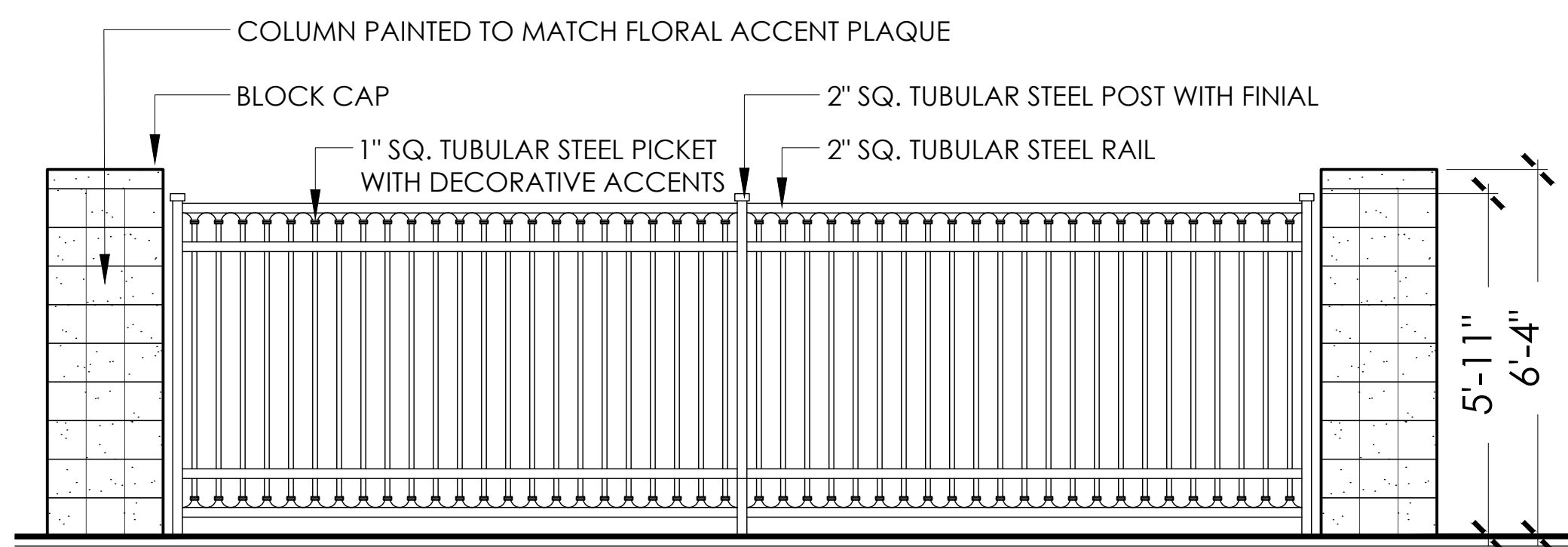
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SCALE: 1" = 40'



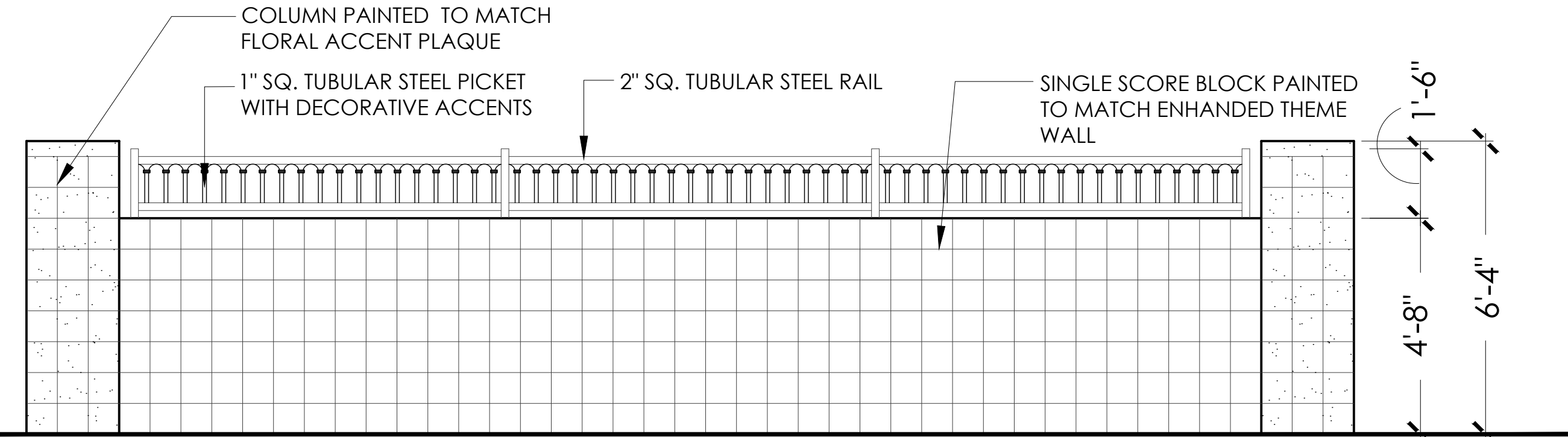
3 ENHANCED THEME WALL
SCALE: 1" = 30'



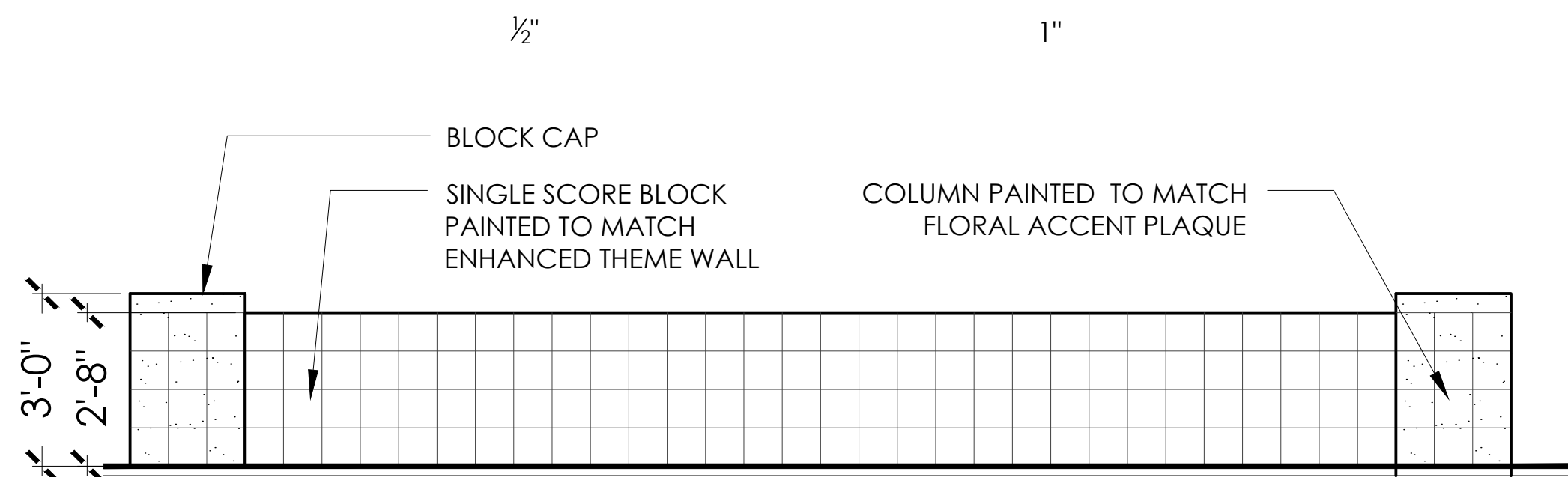
4 THEME WALL
SCALE: 1" = 30'



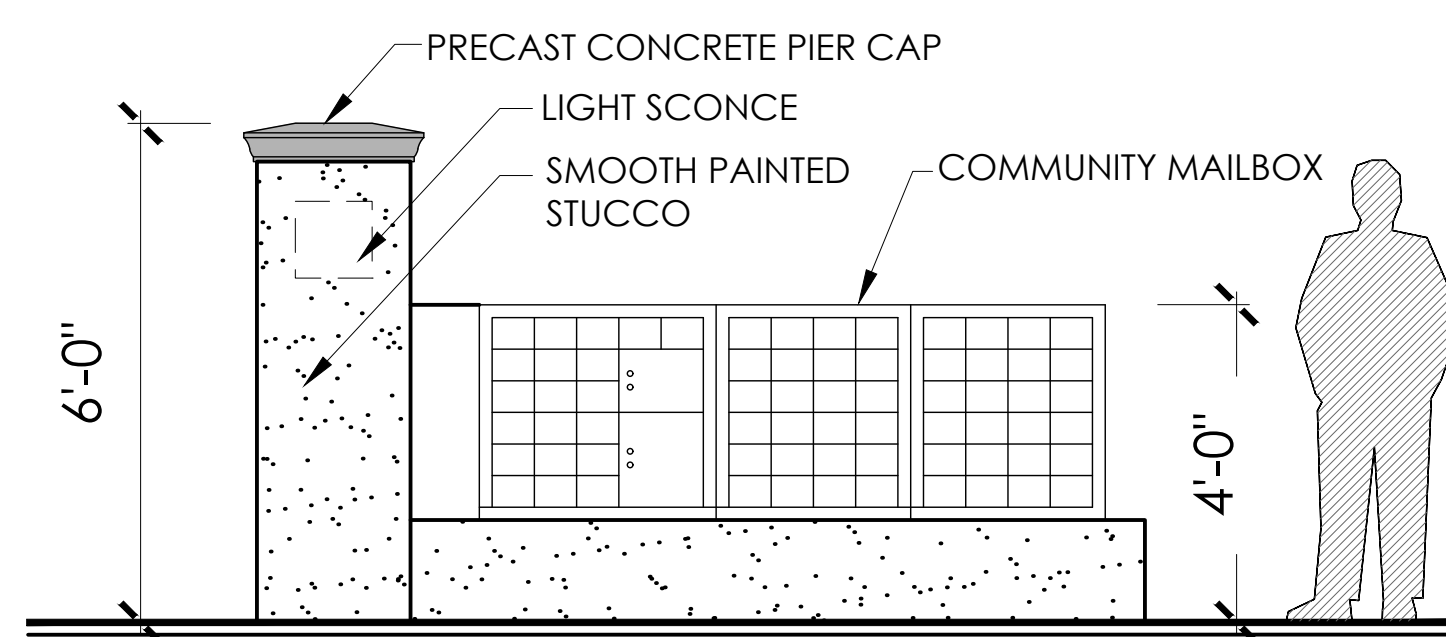
5 FULL VIEW FENCE
SCALE: 1" = 30'



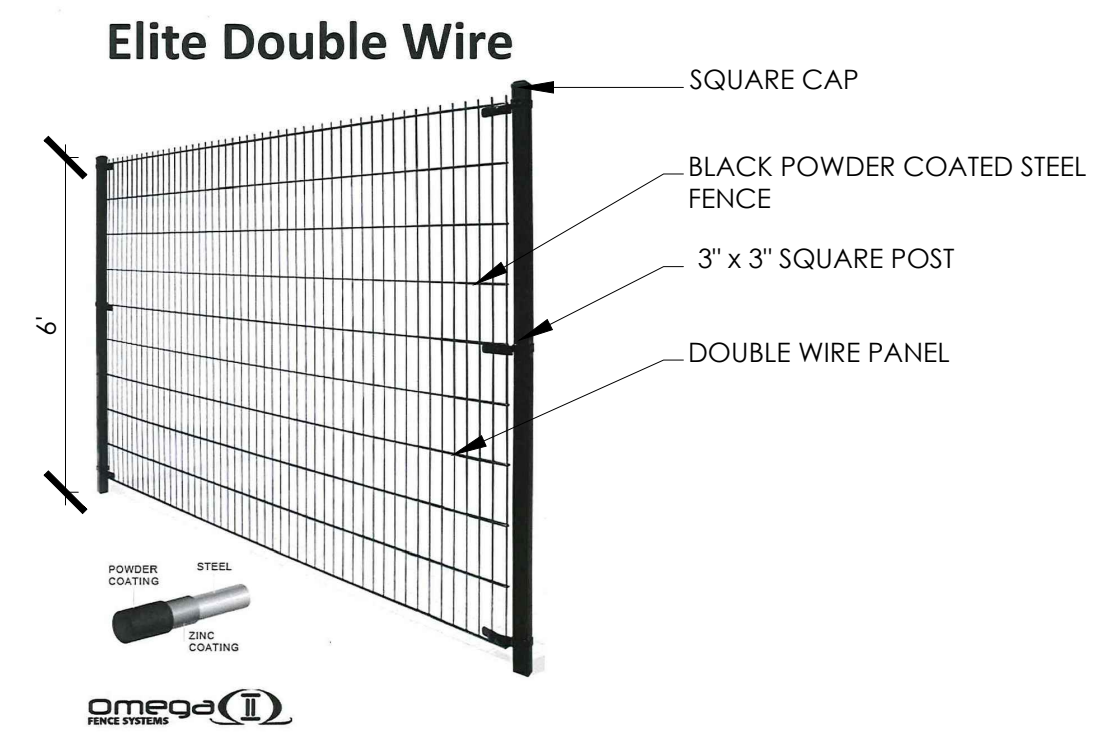
6 PARTIAL VIEW FENCE
SCALE: 1" = 30'



7 PONY WALL
SCALE: 1" = 30'



8 MAILBOX CLUSTER
SCALE: 1" = 30'



NOTE: INSTALL PER
MANUFACTURE
SPECIFICATIONS

9 DOG FENCE
SCALE: N.T.S.



**DEPARTMENT OF THE AIR FORCE
AIR EDUCATION AND TRAINING COMMAND**

3 October 2016

Mr. James R. Mitchell
Director, Community Initiatives Team
56th Fighter Wing
14185 West Falcon St.
Luke AFB AZ 85309-1629

Ms. Jamie Sullivan
Development Services Specialist
City of Surprise Planning Department
16000 N. Civic Center Plaza
Surprise AZ 85374

Re: FS16-392; Magnolia

Dear Ms. Sullivan

Thank you for the opportunity to provide comments on the Annexation, Rezone and Preliminary Plate Application for Magnolia. The project consist of 233 acres located at the northeast corner of Cactus Road and 175th Avenue in unincorporated Maricopa County. The intent of the applicant is to annex the subject property into the City of Surprise in order to zone and develop portions of the property as a residential master planned community. Magnolia will be an 181.1 acre residential master planned community within a growth area of the City of Surprise consisting of 900 single family homes with a 5.0 du/ac. The Rezone will be from Rural 43 (RU-43) to Residential medium, Planned Unit Development (MR-9 PUD) and RM-6 PUD. The development is located approximately 2.28 miles outside the Luke AFB 1988 JLUS 65 Ldn, "high noise or accident potential zone" as identified by A.R.S. § 28-8461 and is within the "territory in the vicinity of a military airport" also defined by A.R.S. § 28-8461. The site is also 5.8 miles outside the Luke AFB Auxiliary Field #1 2004 65 Ldn, "high noise or accident potential zone".

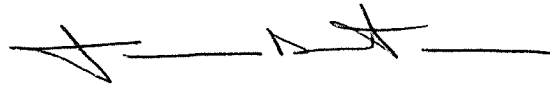
Luke AFB follows the guidelines of the Graduated Density Concept (GDC). The GDC proposes, in the absence of a more restrictive state, county or municipal general or comprehensive plan, a maximum of 2 du/acre from the 65 Ldn to 1/2 mile, a maximum of 4 du/acre from 1/2 mile to 1 mile and a maximum of 6 du/acre from 1 to 3 miles. The above density of 5.0 du/ac falls within these guidelines.

The request for annexation and construction of 900 single family homes will not negatively impact Luke AFB's flying mission. Since the site will be located within the "territory in the vicinity of a military airport," it will be subjected to approximately 165 over flights a day, with some as low as 1,500 feet above ground level. We recommend you review the sound

attenuation requirements found in A.R.S. § 28-8482. In addition, a strong notification program on the part of the applicant is essential to inform potential residents about Luke AFB operations.

If there are any questions, please contact my Community Planner, Ms. Barbara Plante, at (623) 856-9981.

Sincerely

A handwritten signature in black ink, appearing to read 'J. Mitchell', followed by a horizontal line.

JAMES R. MITCHELL

cc:

Colonel David G. Shoemaker, Vice Commander, 56th Fighter Wing

Ms. Cindy L. Calderon, GS-13, General and Environmental Law Attorney, 56th Fighter Wing

Jamie,

I have reviewed the proposed FS16-392 Magnolia residential development. The development does not affect any ADOT highway facilities.

We appreciate the opportunity to review and comment.

PETE ENO

Right Of Way Coordinator

205 South 17th Avenue Mail Drop 612E

Phoenix, AZ 85007

602-712-7348

azdot.gov



Jamie,

Thank you for providing the Electronic Submittal for Magnolia (FS16-392).

MWD has reviewed this submittal and determined that the proposed development project will impact MWD. As a result, this development will require a development agreement between MWD and the developer to address the impacts to MWD's facilities and/or property interests. Please have the developer or their consultant contact MWD to discuss this project. Additionally, the developer will need to provide copies of any subdivision plats and utility and improvement plans to MWD for review and approval pursuant to the attached *MWD Drawing Requirements*, along with payment of the applicable plan review fees pursuant to the attached *MWD Fees & Payment Schedule*. Upon our review of the plat and/or plans once they are provided by the developer, MWD will copy the City on our approval and/or comments.

Thanks again,

Debbie Trasancos

Property & Contracts Specialist

Maricopa Water District

14825 W. Grand Ave.

Surprise, AZ 85374

623/546-8266

fax 623/584-2536

debbiet@mwdaz.com



S U R P R I S E

ARIZONA

City Council

January 17, 2017



175th & Sweetwater



FS16-427

- ✓ Annexation

FS16-391 175th & Sweetwater

- ✓ Zone Change
- ✓ Preliminary Plat

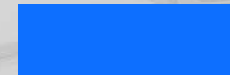
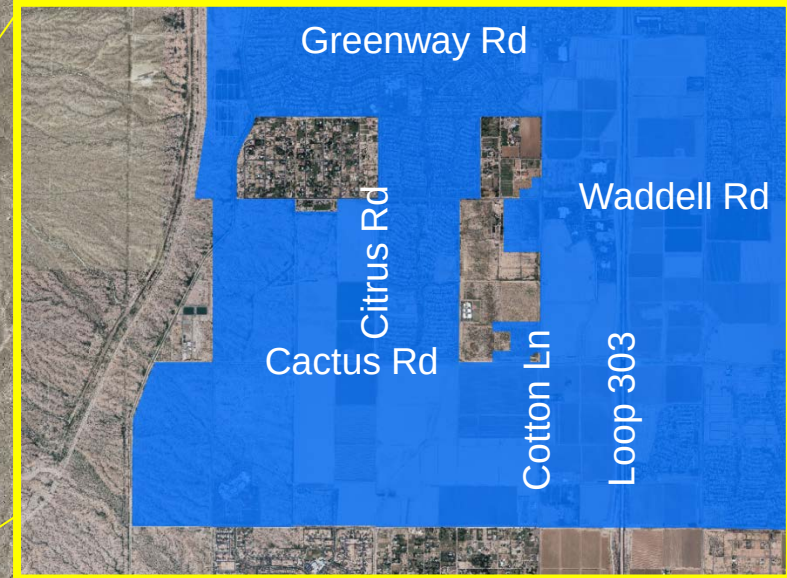
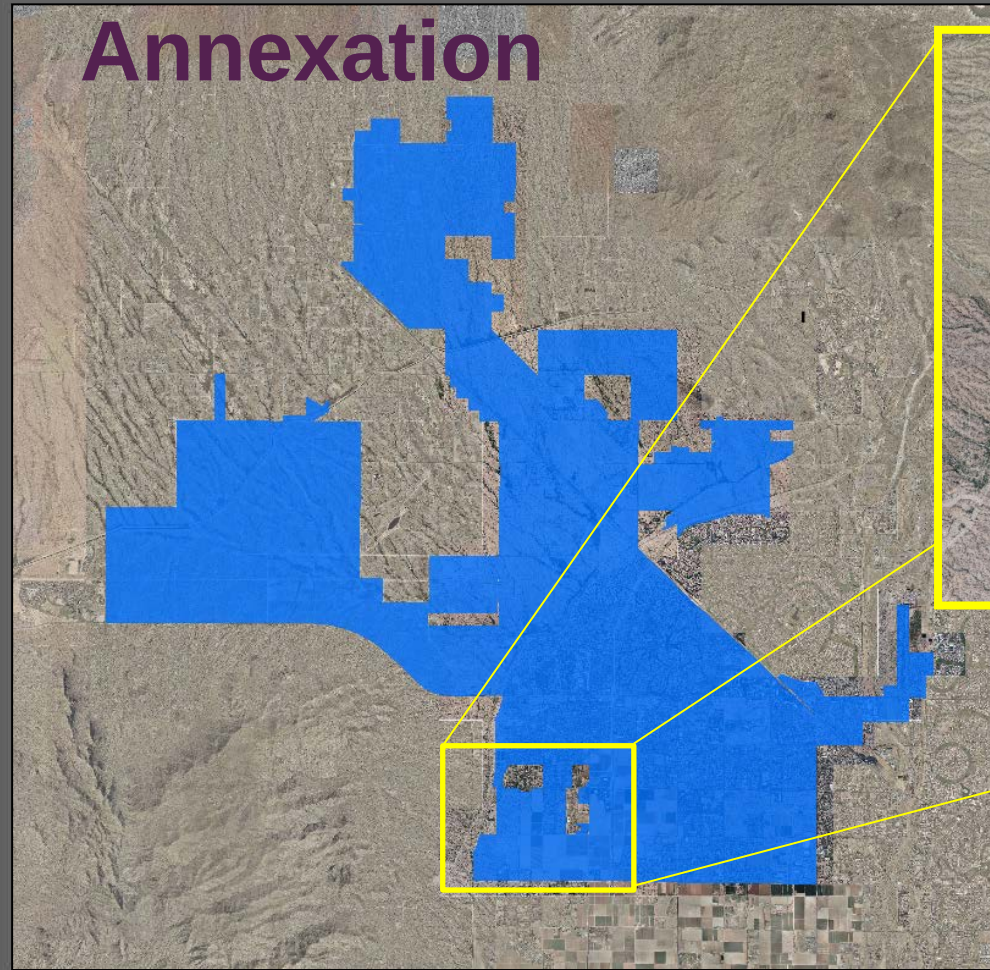
FS16-392 Magnolia

- ✓ Zone Change
- ✓ Preliminary Plat



175th & Sweetwater

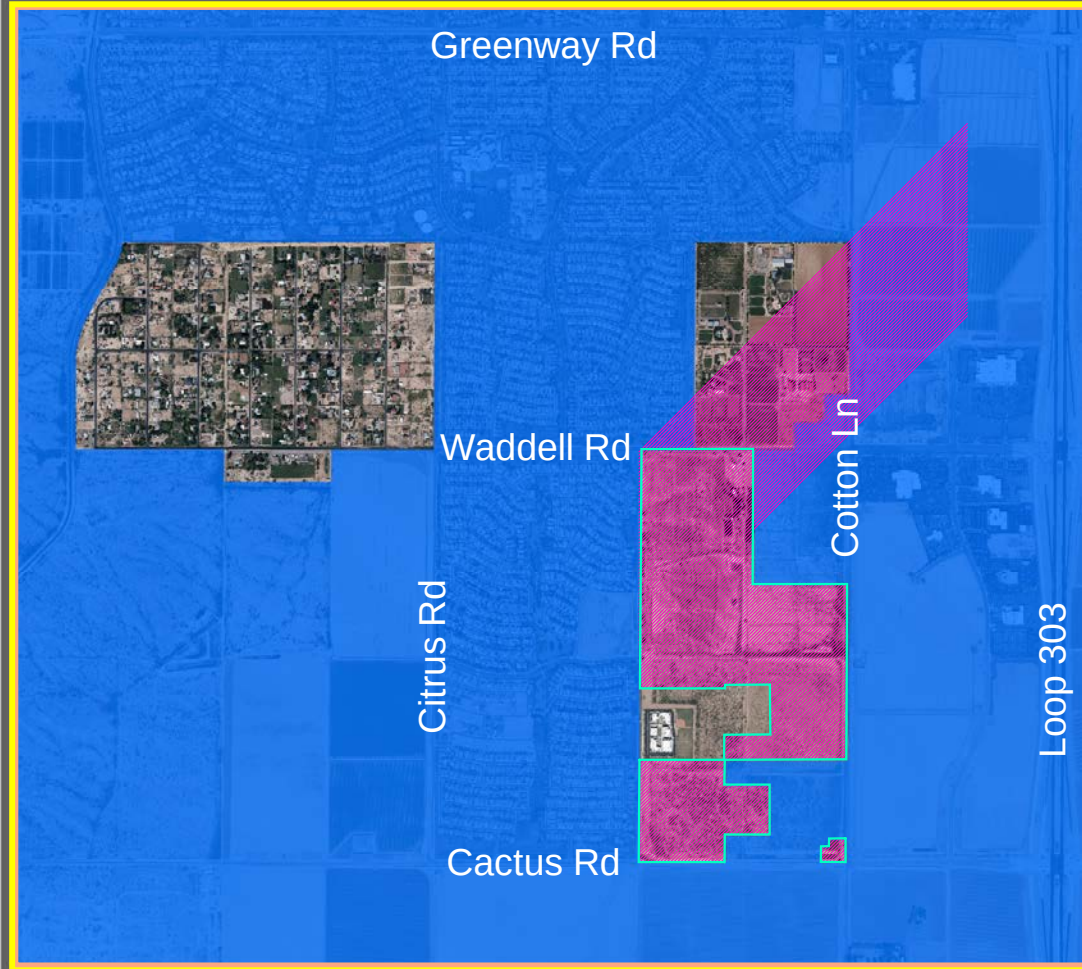
Annexation



Existing Surprise
Annexation

FS16-427

Annexation



FS16-427

Greenway Rd

Waddell Rd

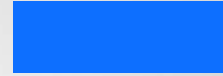
Citrus Rd

Cactus Rd

Cotton Ln

Loop 303

Annexation



Existing Surprise
Annexation

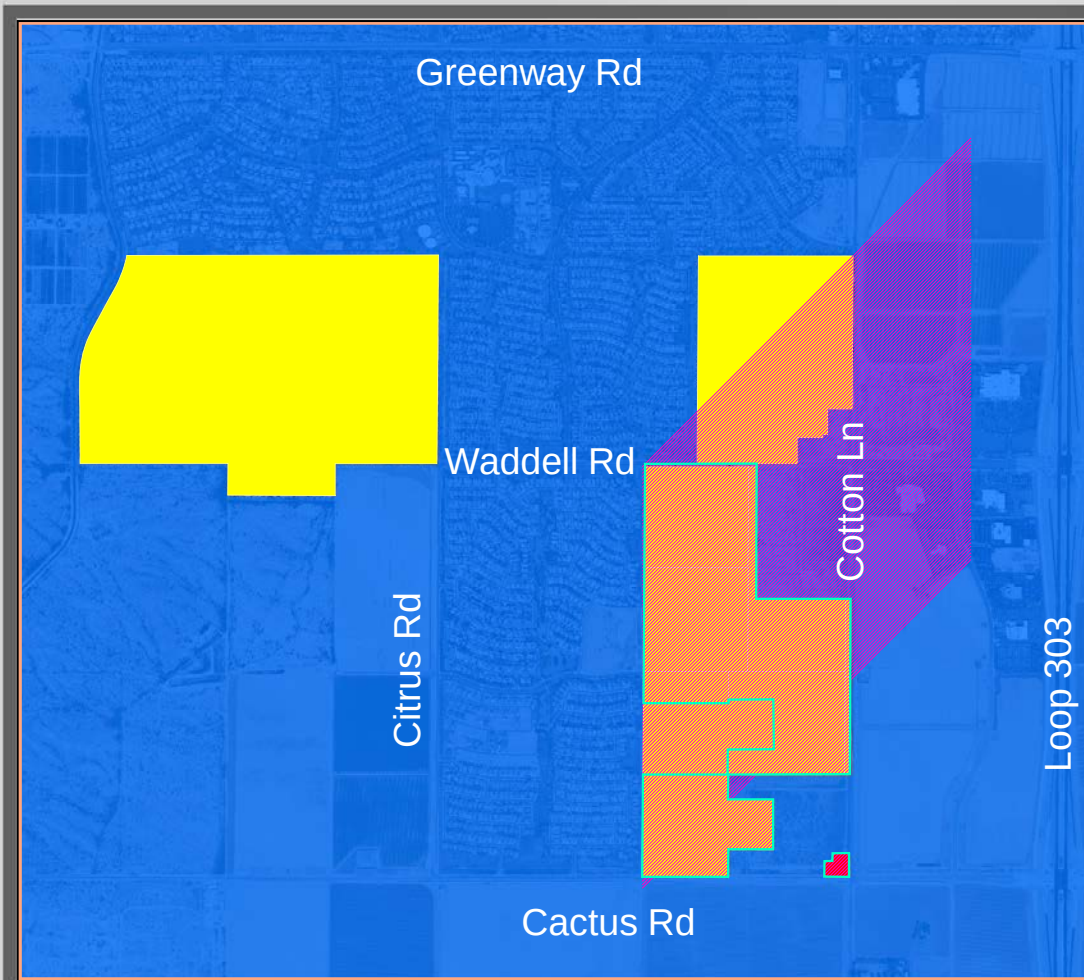


Existing County
RU-43 Zoning

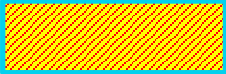
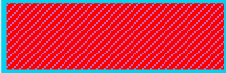


Existing County
C3 Zoning

FS16-427



Annexation

-  Existing Surprise Annexation
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning

FS16-427

Financial Impact Analysis

➤ Operating Funds

- Negative impact
- Expenses greater than revenue by \$8,851,300 over 20 years
- \$442,600 annually

➤ Enterprise Funds

- Positive Impact
- \$1,387,200 over 20 years
- \$69,400 annually

FS16-427

Alternative Actions:

- **Approve** the Annexation
- **Deny** the Annexation



Zone Changes:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia

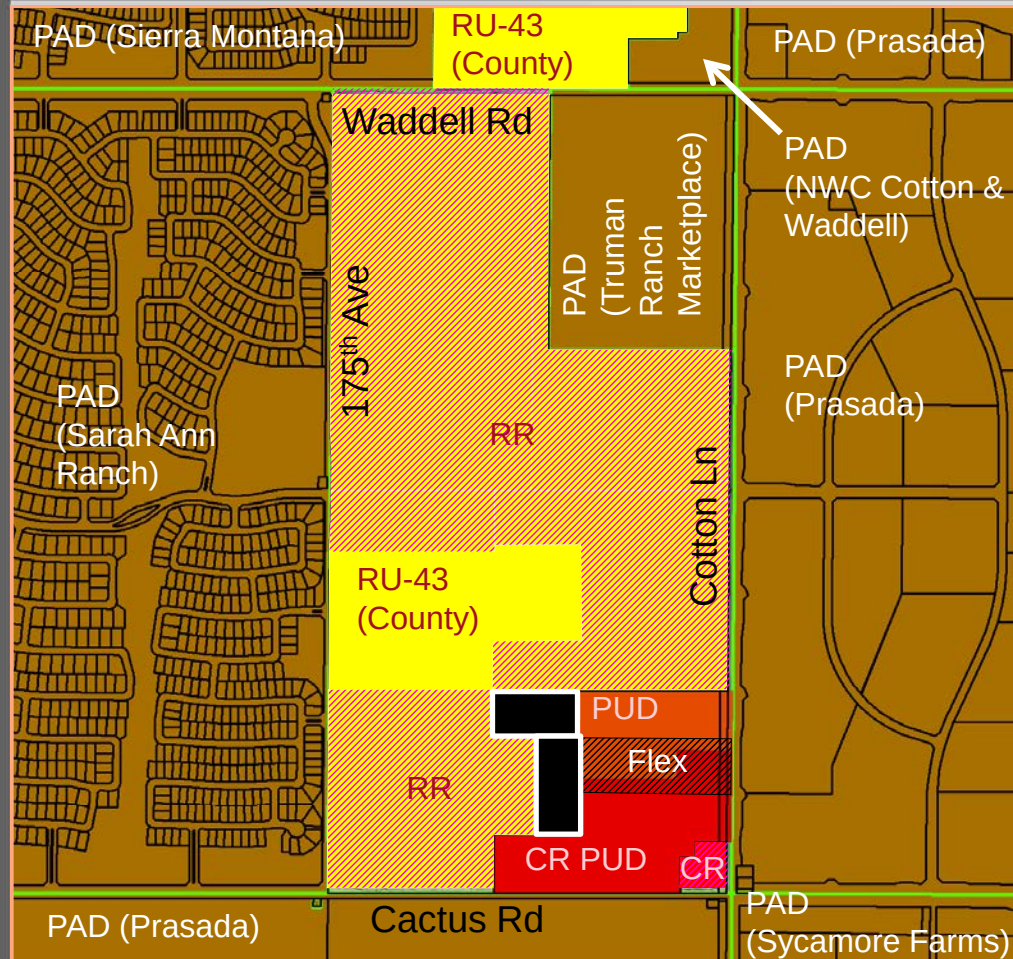


Zone Changes:

1st Zone Change Request:

➤ FS16-392 Magnolia

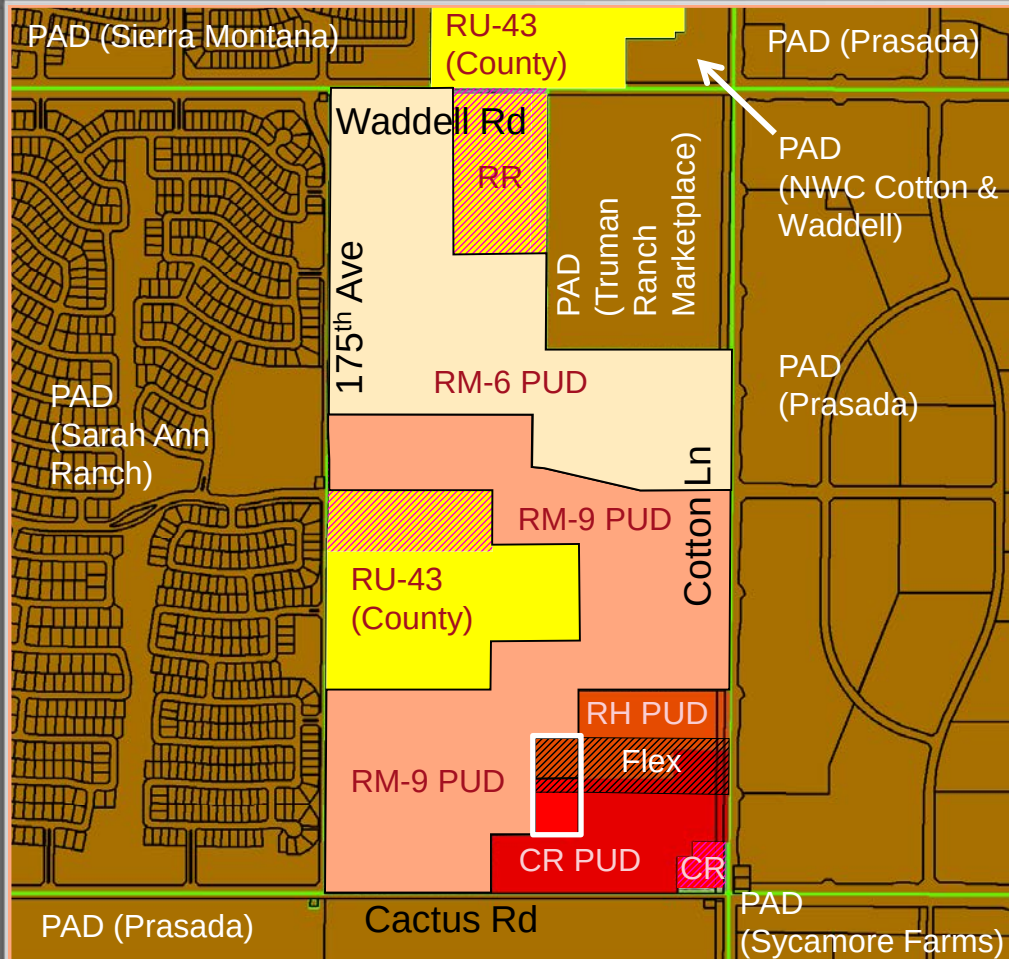




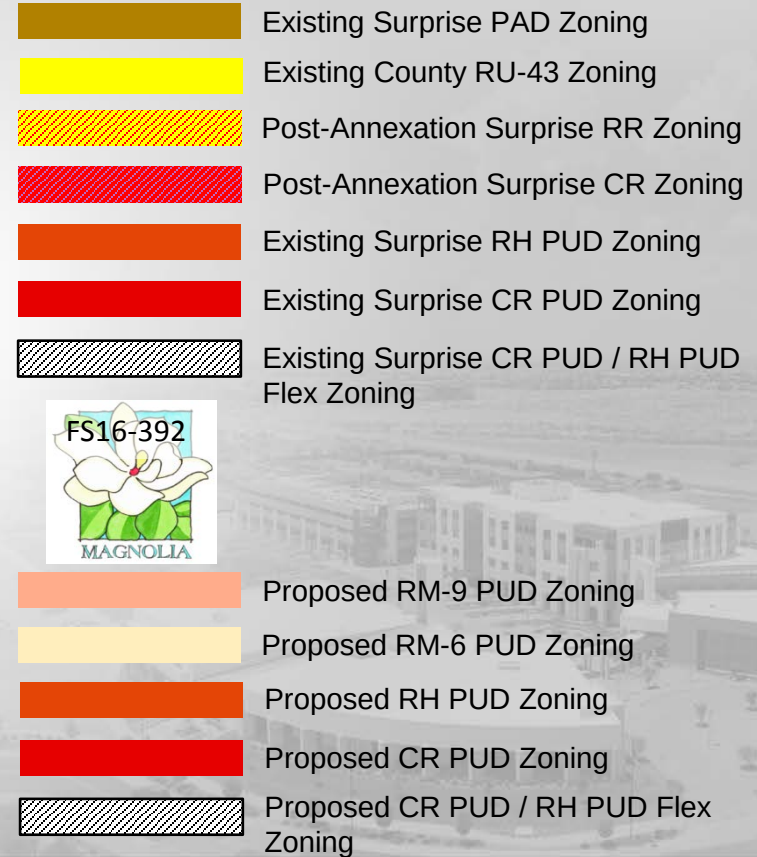
Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning*
- Post-Annexation Surprise CR Zoning*
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning

*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change



Zone Change



FS16-392

Table 1: RM-6 FUD and RM-9 FUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 FUD Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a FUE, in which case the minimum front setback for RM-9 shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.
- (4) For RM-6 FUD, single-story minimum setback is 15', and two-story minimum setback is 20'.
- (5) For cluster product in the RM-9 FUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.





PRIMARY ENTRY MONUMENT



ENTRY FEATURE IN MEDIAN



PRIMARY ENTRY PLAN VIEW (COTTON LANE & SWEETWATER AVE)

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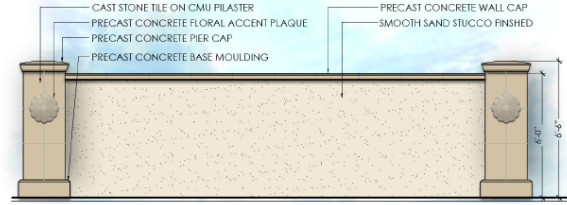
MAGNOLIA

FIGURE 6: COMMUNITY ENTRY MONUMENT

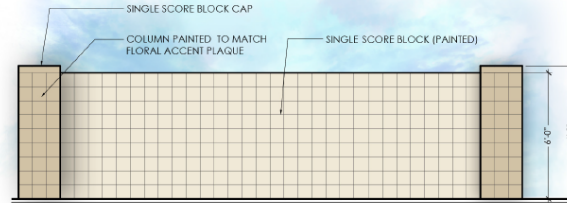
1640

DRAWN BY: PR

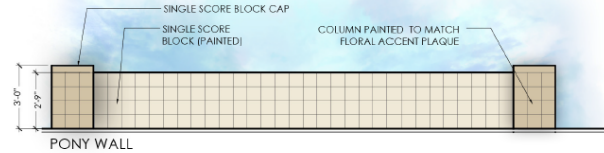
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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 6 COMMUNITY ENTRY MONUMENT.dwg Sep 7, 2016



ENHANCED THEME WALL



THEME WALL



PONY WALL

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MAGNOLIA

FIGURE 7: WALL DETAILS

APPROX. SCALES

1640

DRAWN BY: PR



11/16/16

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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



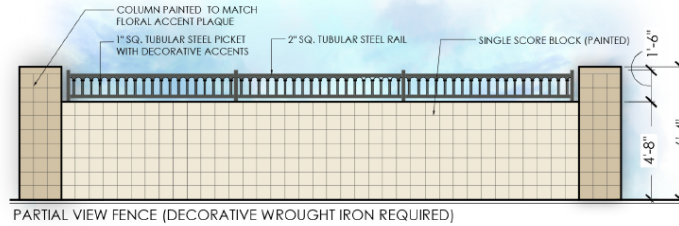
FS16-392

Monuments and Walls

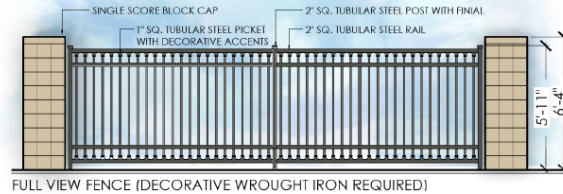


FS16-392

Monuments and Walls



PARTIAL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)



FULL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)

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MAGNOLIA

FIGURE 7A: WALL DETAILS

APPROX. SCALENTS

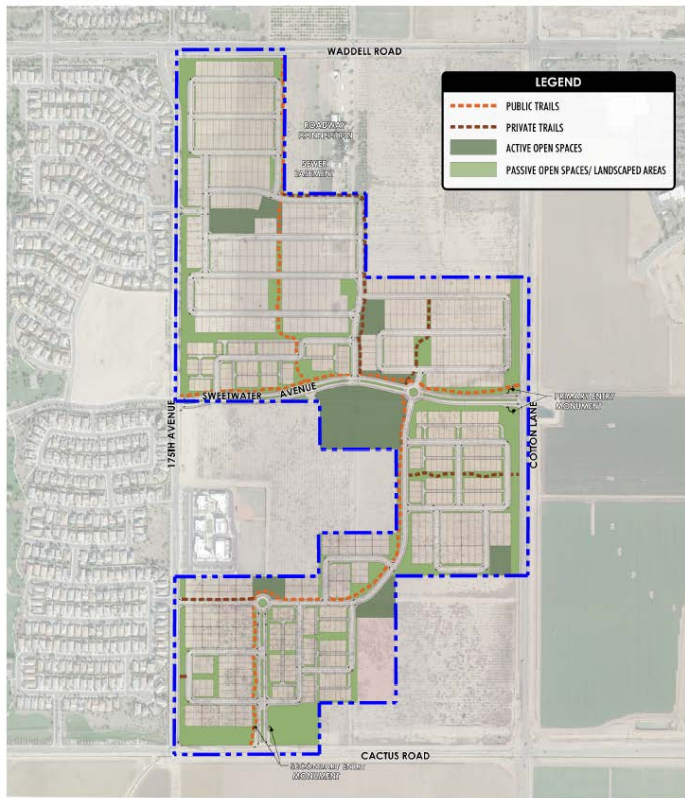
1/40

DRAWN BY: PE



11/0/16

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 6/1/16 MAGNOLIA/PLANNING/LVA-160 FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\UVA-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016



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175TH & SWEETWATER

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

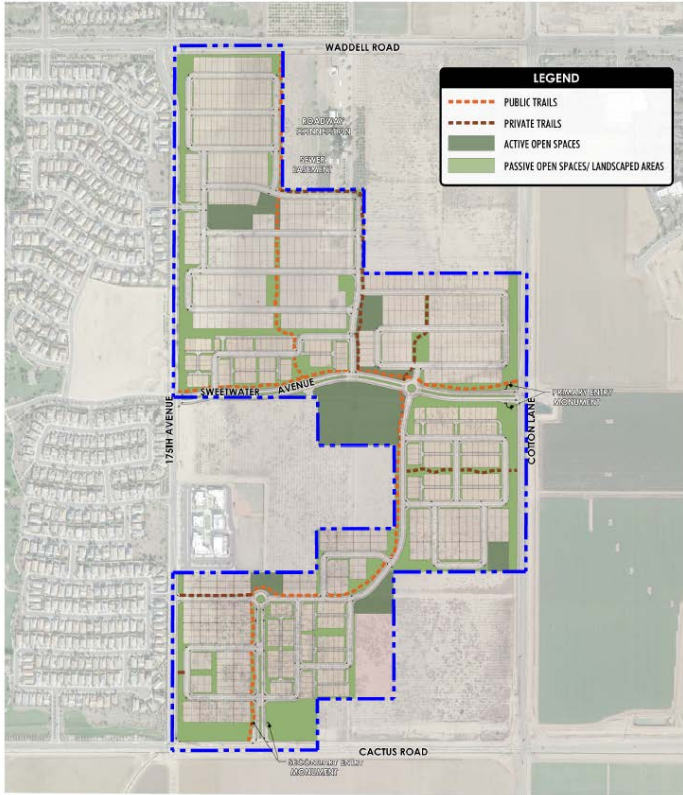
1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\UVA-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016

Amenities



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MAGNOLIA

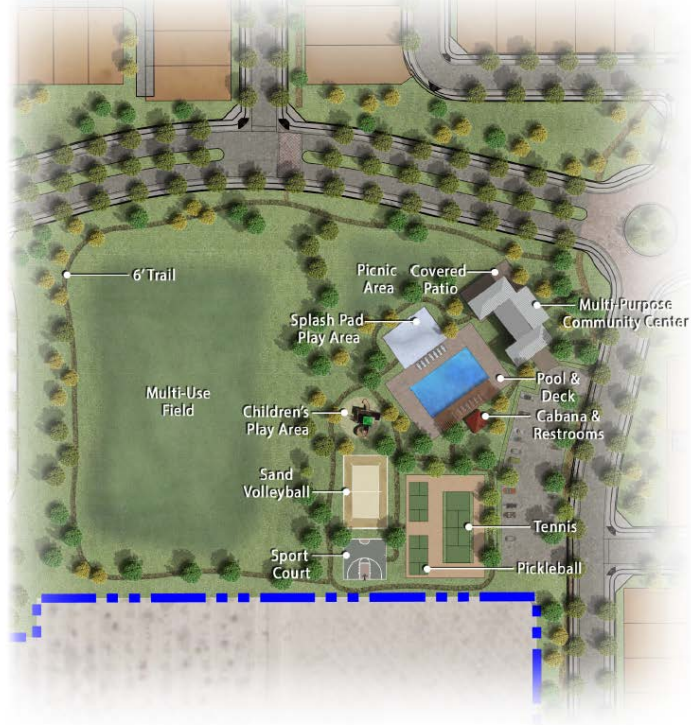
FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE(S)

1640 DRAWN BY: PR



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U:\1040-MAGNOLIA\LAND PLANNING\1040-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Rev 2, 2015



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MAGNOLIA

FIGURE 5: TRUMAN COMMUNITY CENTER SKETCH CONCEPT

APPROX. SCALE(S)

1640 DRAWN BY: PR



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U:\1040-MAGNOLIA\LAND PLANNING\1040-1040-FIGURE 5-TRUMAN COMMUNITY CENTER SKETCH.dwg Aug 30, 2015



FS16-392

Amenities

Commission Recommendation:

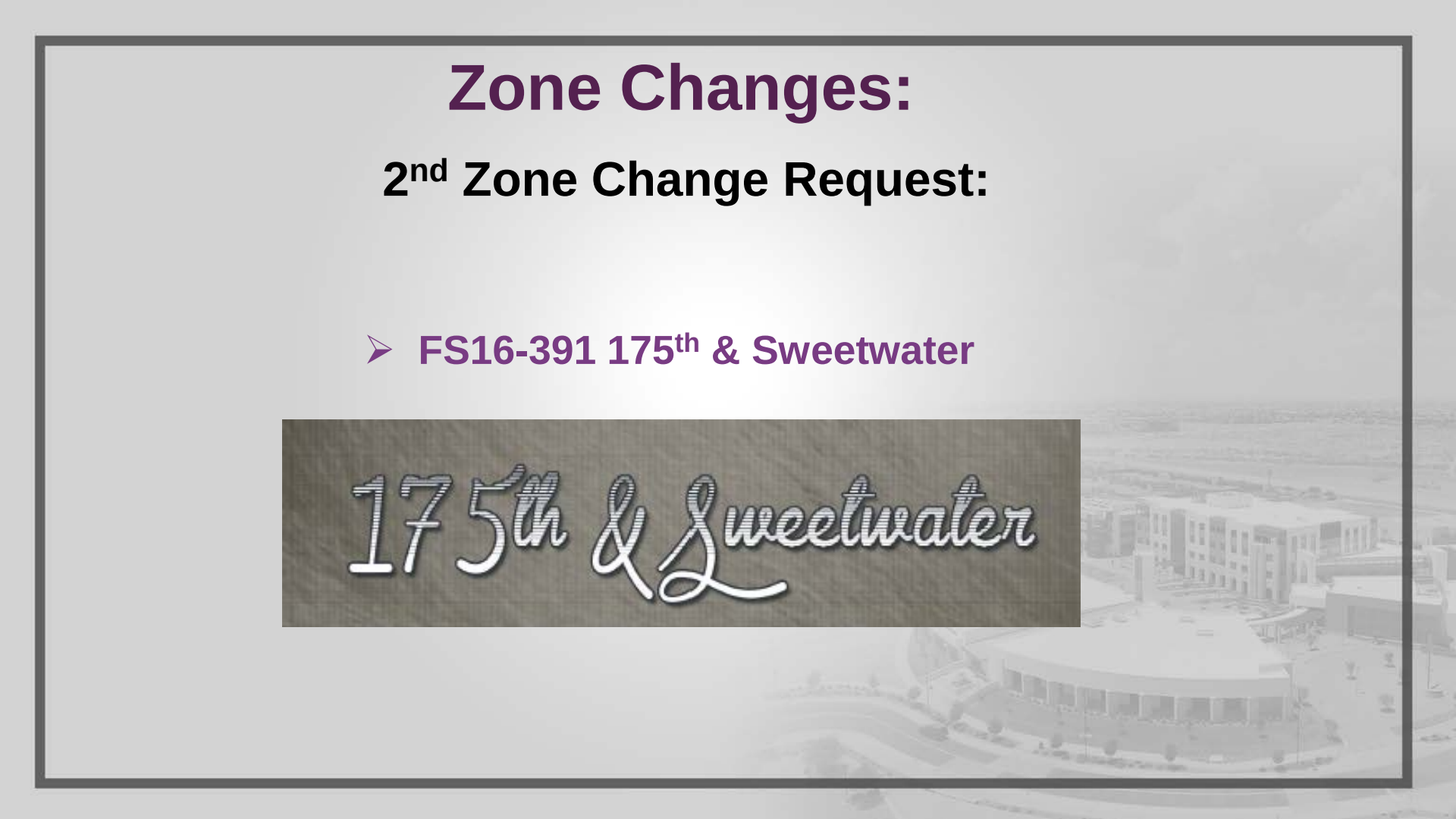


- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”

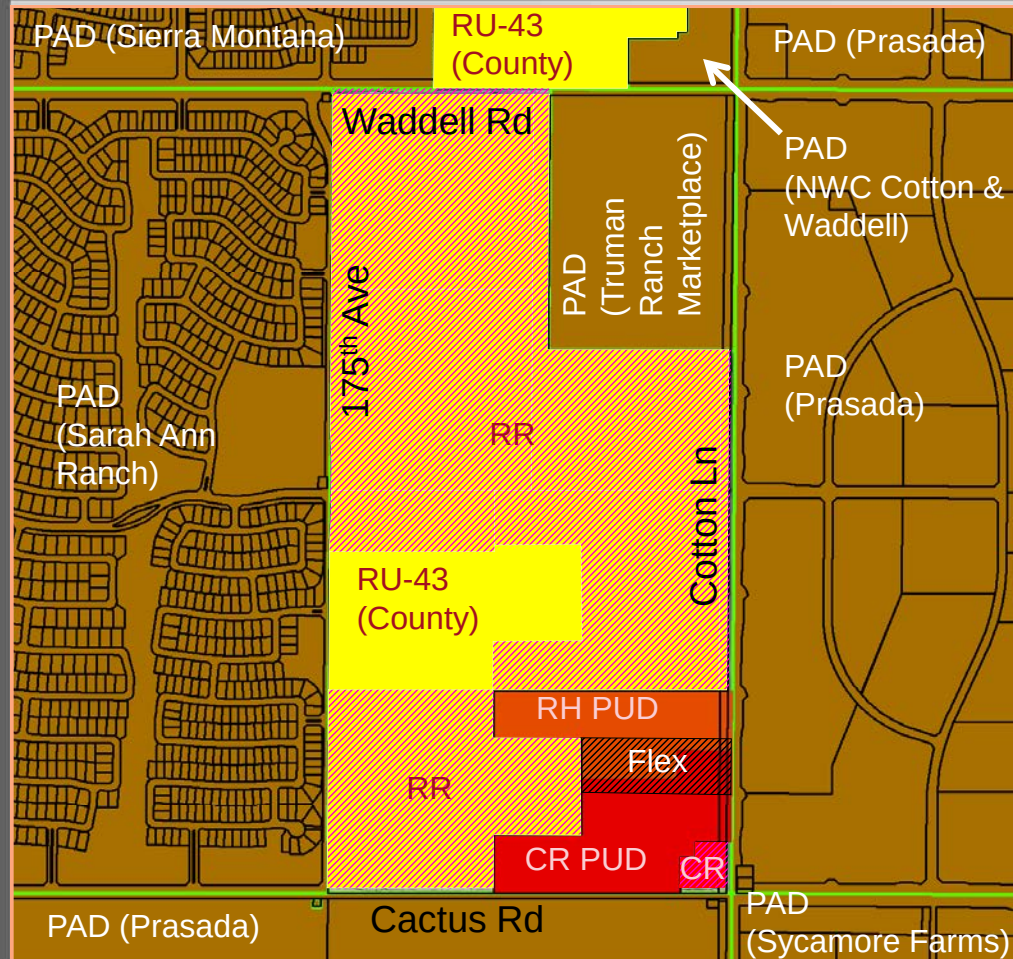
Zone Changes:

2nd Zone Change Request:

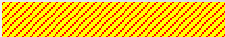
- FS16-391 175th & Sweetwater



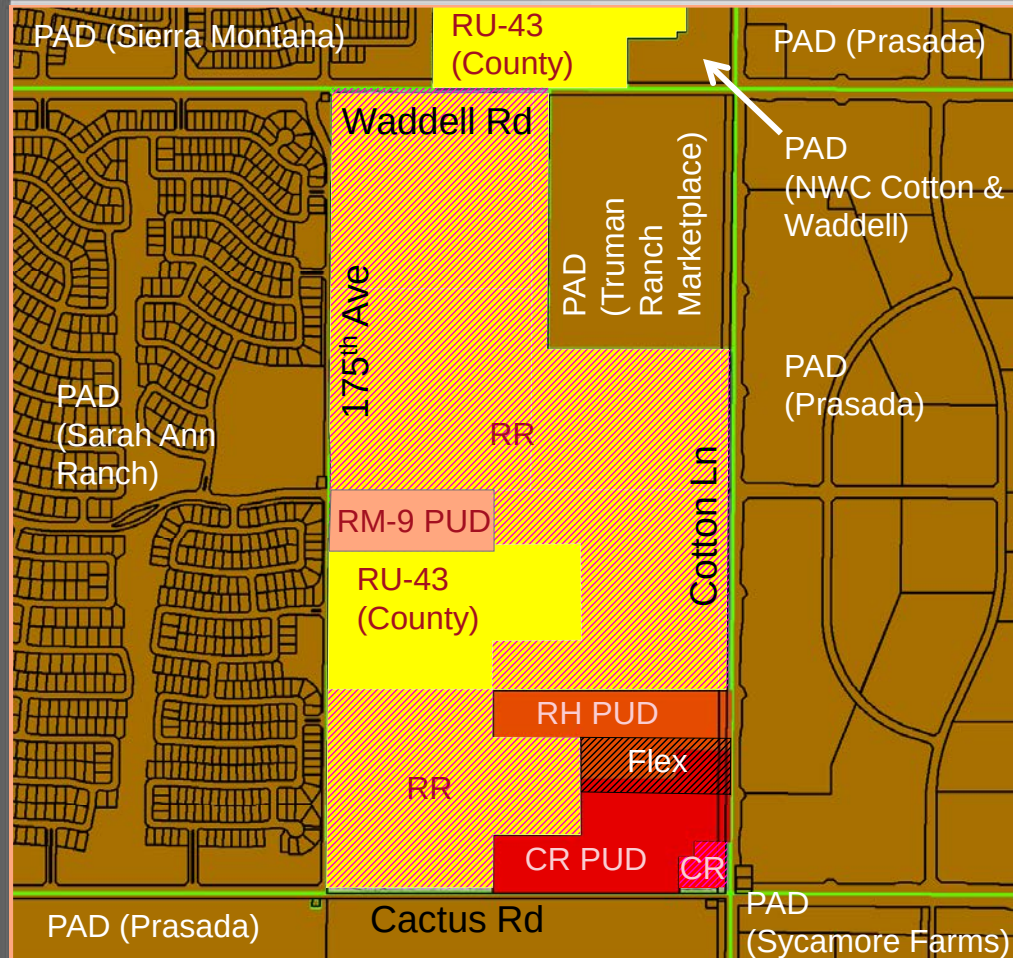
175th & Sweetwater



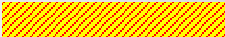
Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning*
-  Post-Annexation Surprise CR Zoning*
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

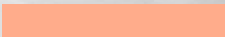
*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

175th & Sweetwater
FS16-391

-  Proposed RM-9 PUD Zoning

Zone Change

175th & Sweetwater
FS16-391



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175TH & SWEETWATER

FIGURE 3: DEVELOPMENT PLAN CONCEPT

APPROX. SCALE: 1/8" = 1'

1640 DRAIN BY: PK



11/2/14

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11/16/14 ANR0014/CAD/P/ANN0014-1405-FIGURE 3 DEVELOPMENT PLAN CONCEPT.dwg, Rev. 2, 2014

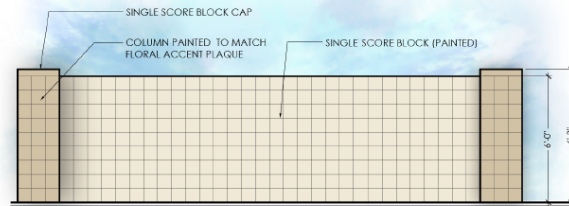
Table 1: RM-9 FUD Development Standards

Development Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35

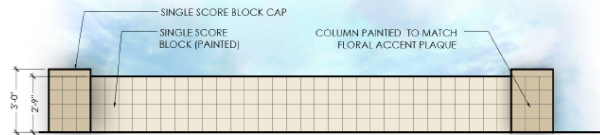
Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a FUE, in which case the minimum front setback shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.

Monuments and Walls



THEME WALL



PONY WALL

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”

Preliminary Plats:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia



Preliminary Plats:

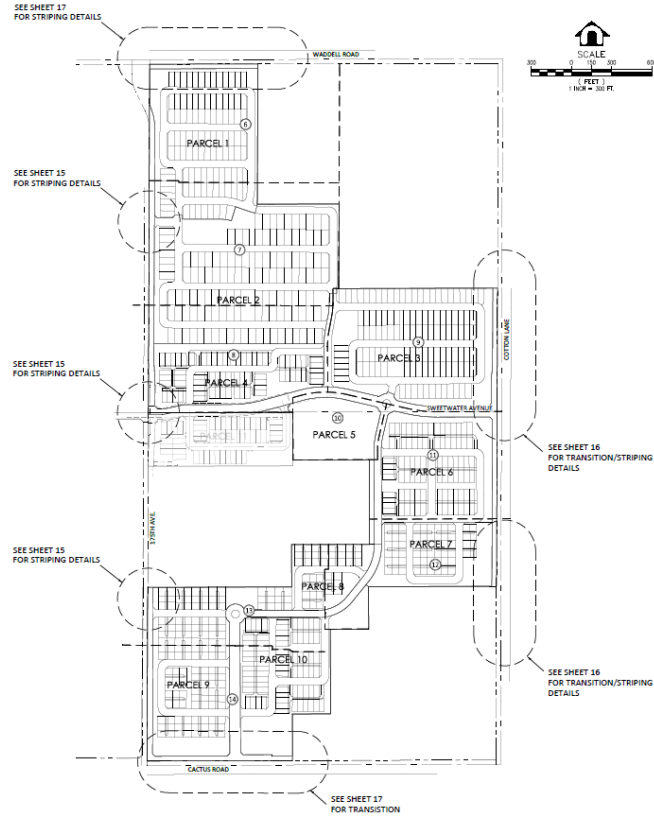
1st Pre-Plat request:

➤ **FS16-392 Magnolia**





Primary Plat



DATE: 11/14/2016 TIME: 14:28 BY: 220 2 SHEET OF 20 PROJECT NAME: 16041 E. 1ST AVE. SHEET NO.: 2 DATE: 11/1/2016 DATE: 11/1/2016	 DAVID BYARS Mayor 4401 N. Washington Blvd., Ste. 200 Nogales, Arizona 85601  EXPIRES: 3/31/2017	SHEET INDEX FOR MAGNOLIA CITY OF NOGALES, ARIZONA
--	--	---

Preliminary Plat



FS16-392

- 812 Lots Total
 - 215, 45' x 110 Standard Lots in the RM-6 PUD Zoning District
 - 125, 55' x 115' Standard Lots in the RM-6 PUD Zoning District
 - 224, Alley Loaded Lots in the RM-9 PUD Zoning District
 - 248, Cluster Lots in the RM-9 PUD Zoning District

Preliminary Plat



FS16-392

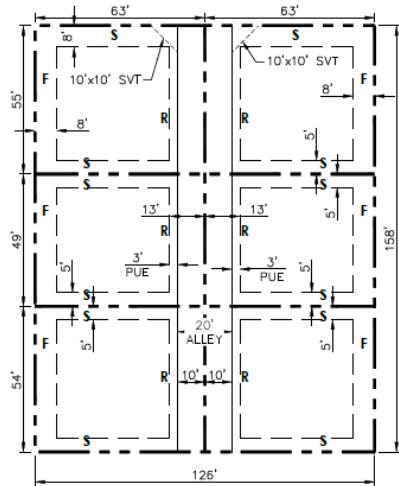
- Will integrate with 175th & Sweetwater Project
- Phase I must plat concurrently with 175th & Sweetwater Project or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities with the 175th & Sweetwater project and be part of a combined Magnolia HOA

Preliminary Plat

FS16-392



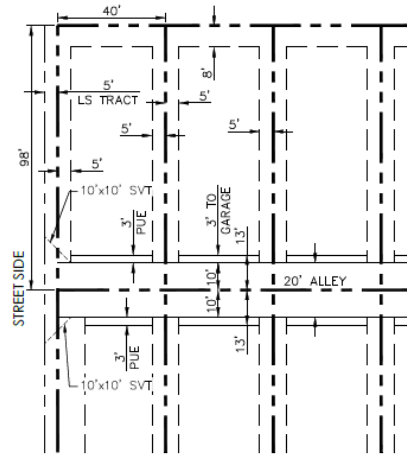
CLUSTER PRODUCT



F	= FRONT YARD
R	= REAR YARD
S	= SIDE YARD

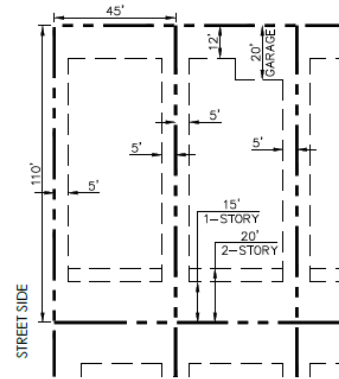
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
STREET SIDE:	8' (10' WHERE ADJACENT TO AN 8' PUE)
REAR: (ALLEY)	13'

ALLEY PRODUCT (3,920 S.F.)



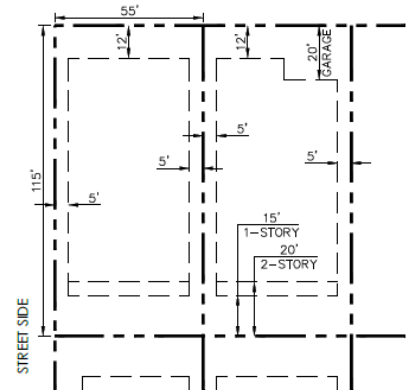
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
REAR: (ALLEY)	13'

45' X 110' LOT SIZE (4,950 S.F.)



FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

55' X 115' LOT SIZE (6,325 S.F.)

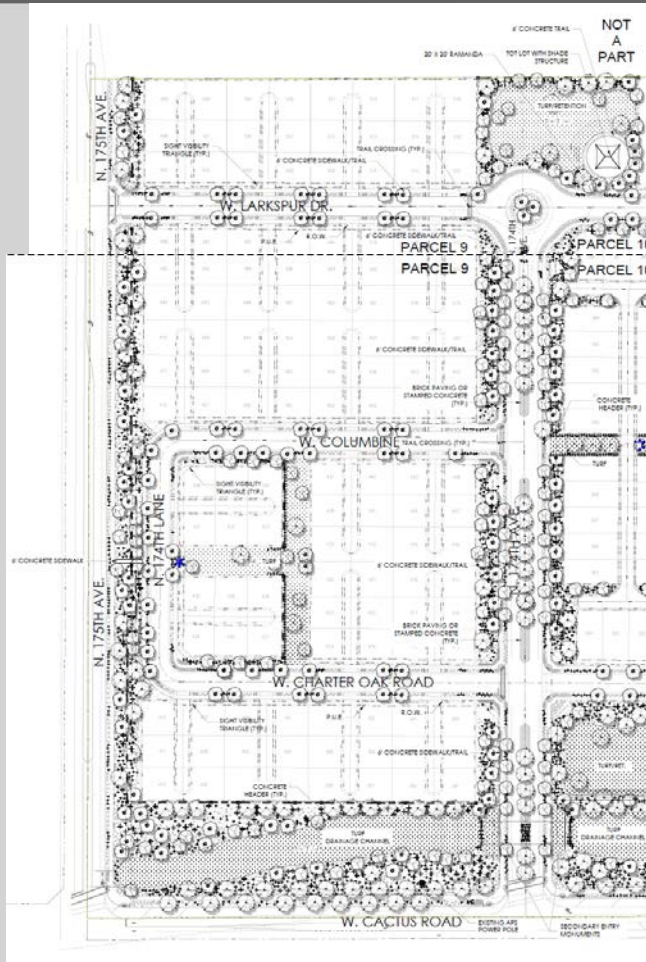


FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

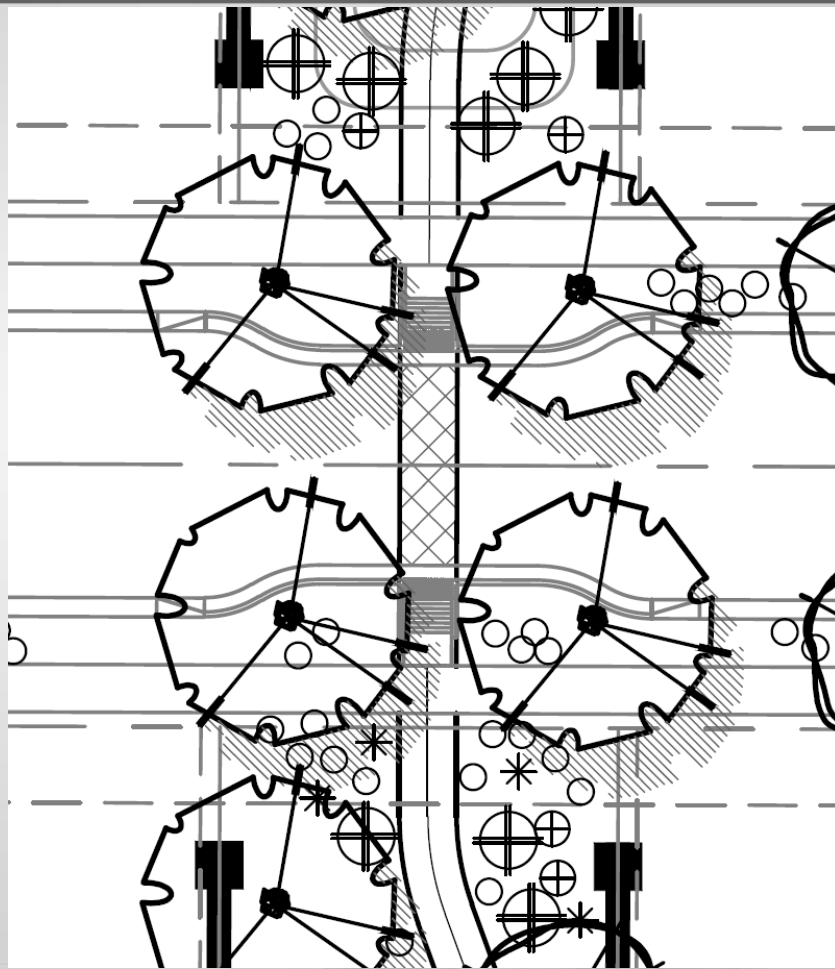
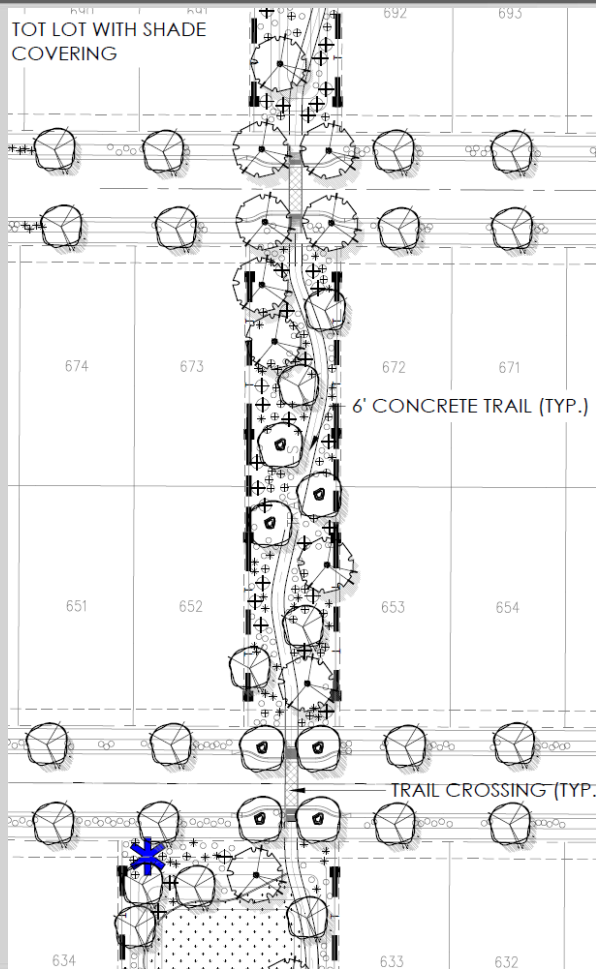


FS16-392

Preliminary Plat



TOT LOT WITH SHADE
COVERING



FS16-392

Preliminary Plat



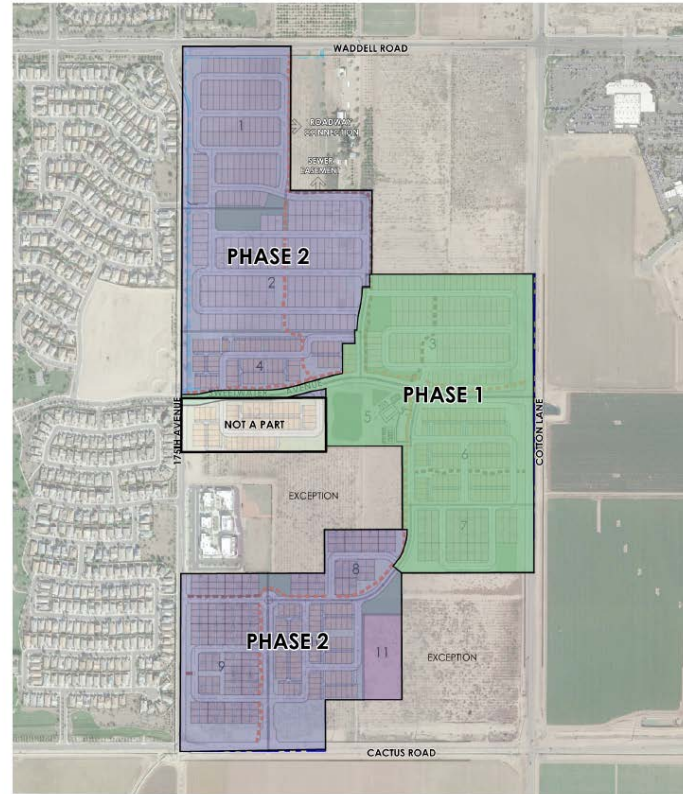
FS16-392

Preliminary Plat



FS16-392

Preliminary Plat



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MAGNOLIA

FIGURE 8: CONCEPTUAL PHASING PLAN

APPROX. SCALE: 1/8" = 1' 1/4"

1/8" = 1' 1/4" DRAWN BY: PR



9/8/16

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 U:\1640-MAGNOLIA\CD\PLANNING\1640-FIGURE 8-CONCEPTUAL PHASING PLAN.dwg Sep 8, 2016

Commission Recommendation:



- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

Preliminary Plats:

2nd Pre-plat request:

- ## ➤ FS16-391 175th & Sweetwater

17 5th & Sweetwater

Preliminary Plat

175th & Sweetwater
FS16-391

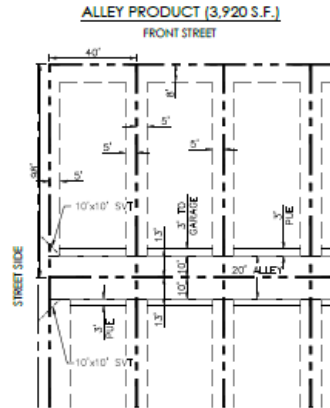
- 49 Alley Loaded Lots in RM-9 PUD Zoning District
- Will integrate with Magnolia
- Must plat concurrently with Magnolia Phase I or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities and be part of the Magnolia HOA

175th & Weethaler
FS16-391



Preliminary Plat

175th & Sweetwater FS16-391



FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
REAR: (ALLEY)	13'

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



Commission Recommendations*:

*** Assumes prior City Council approval of related annexation)**



175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

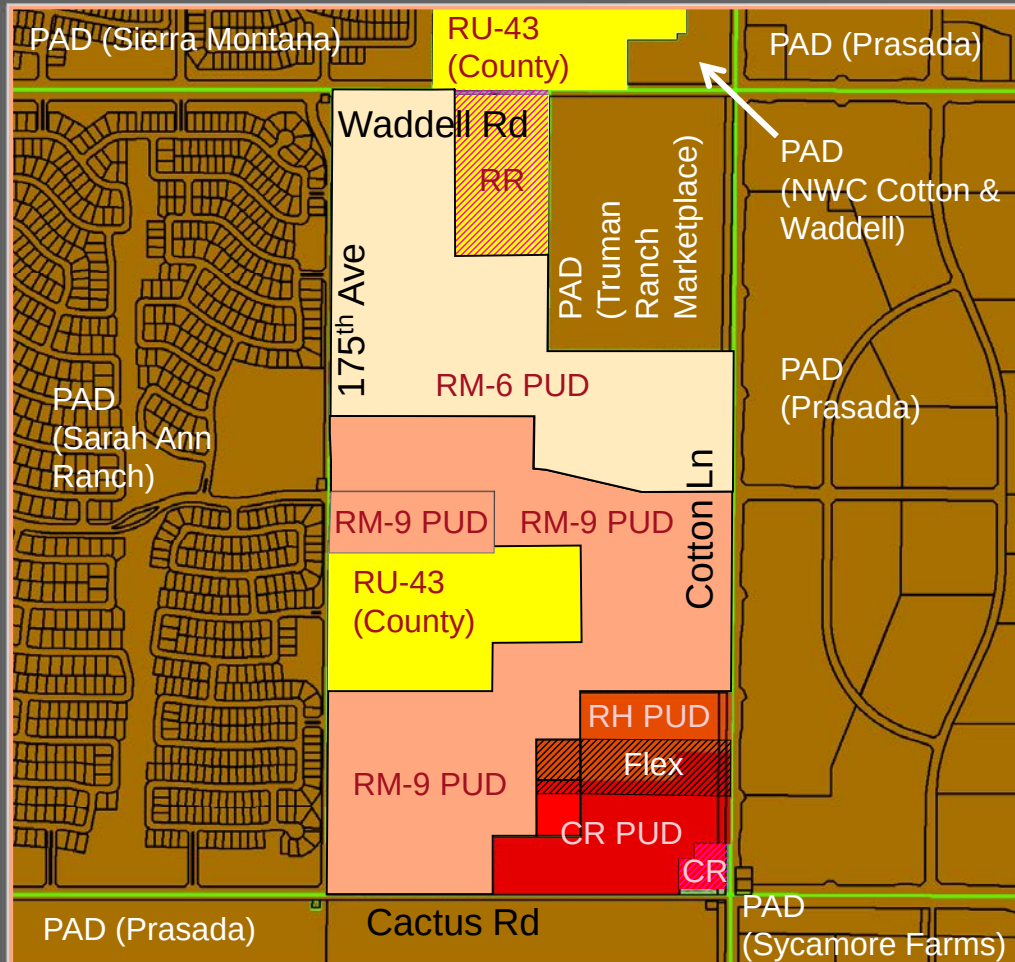


SURPRISE

ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning



175th & Sweetwater
FS16-391

- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date:	January 17, 2017	Contact Person:	ROBERT KUHFUSS - COMMUNITY DEVELOPMENT
Submitting Department:	CD	District:	3
Staff Recommendations:	Approve		

Consent	Regular	Public Hearing	x	Report/Discussion
---------	---------	----------------	---	-------------------

Agenda Wording:

Consideration and action pertaining to approval of the Preliminary Plat entitled, "S.E.C. 175th Ave & Sweetwater" dated November 28, 2016, an approximately 10 acre property located at the southeast corner of 175th Avenue and Sweetwater Blvd.

Motion:

I move to approve the Preliminary Plat entitled "S.E.C. 175th Ave & Sweetwater" dated November 28, 2016 subject to stipulations "a" through "g" as listed in the staff report.

Background:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of a 10-acre, 49-lot Preliminary Plat in the RM-9 PUD zoning district. This request follows a related annexation case being processed under case FS16-427 and is associated with a Zone Change (FS16-391) along with a companion Zone Change and Preliminary Plat being processed under FS16-392. Note: the subject request was continued at the December 15, 2016 Planning and Zoning Commission hearing to a date-certain of January 5, 2017. The results of that hearing are not known as of the writing of this report.

Objective Analysis:

The subject request involves a 10-acre, 49-lot Preliminary Plat in the proposed RM-9 PUD zoning district and anticipates a single lot product type, provides 2.4 acres of open space and implements the development standards, amenities, and other design features of the related PUD Overlay. The 175th & Sweetwater project is very well designed and is consistent with the General Plan and SUDC. The proposed development standards requested under the PUD Overlay are implemented in this Preliminary Plat and will allow the applicant to develop the site in a creative manner in keeping with the intent of the SUDC. Amenities included will provide recreational opportunities for the neighborhood residents.

Policy Compliant:

The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate

transitions are made between the various Neighborhood types included within the character area. The subject proposal contemplates up to 49 dwelling units, which equates to approximately 4.9 DU/Ac. As such the proposed zoning most closely aligns with the Suburban Neighborhood type and is consistent with the General Plan.

Financial Impact:

All activity related to ongoing development of the City of Surprise has an economic and fiscal impact on the city and the region.

Budget Impact:

There is no anticipated budget impact related to this item.

FTE Impact:

This item does not have an impact on current staff levels.

ATTACHMENTS:

Click to download

- ☐ [00 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - Staff Report](#)
 - ☐ [01 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - Vicinity Map](#)
 - ☐ [02 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - Case Map](#)
 - ☐ [03 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat](#)
 - ☐ [04 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - Landscape Plan](#)
 - ☐ [05 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - Luke AFB Comments](#)
 - ☐ [06 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - ADOT Comments](#)
 - ☐ [07 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - MWD Comments](#)
 - ☐ [08 - FS16-391 - 175 Ave & Sweetwater Ave - Preliminary Plat - Presentation](#)
-

PRELIMINARY PLAT

REPORT TO THE CITY COUNCIL

Case: FS16-391

Project Name: 175th & Sweetwater Preliminary Plat

Council District: 3

Meeting Date: January 17, 2017

Planner: Robert H. Kuhfuss, AICP

Owner: A & B Investments, Inc.

Applicant: Mark Reddie of LVA Urban Design Studio on behalf of AZ Community Development, LLC

Request: Preliminary Plat

Site Location: Southeast corner of 175th Avenue and Sweetwater Avenue

Site Size: 10 acres (approx.)

Density: 4.9 DU/Ac

General Plan Conformance: The proposal is consistent with the Surprise General Plan 2035

Support/Opposition: None known

Staff Recommendation: **Approve**, subject to stipulations 'a' through 'g'

Commission Recommendation: Unknown as of the writing of this report

Introduction:

Mark Reddie of LVA Urban Design Studio, on behalf of AZ Community Development, LLC, seeks approval of five (5) separate requests relating to the proposed development in what is currently a county island located in the western portion of Surprise, near Sarah Ann Ranch. These five requests are listed below, with the subject request highlighted in **bold font**; however, this report should be read in the context of the other four requests.

Case FS16-391 – 175th & Sweetwater

- Zone Change from RR to RM-9 PUD
- **Preliminary Plat**

Case FS16-392 – Magnolia

- Rezone from RR to RM-6 PUD; from RR to RM-9 PUD; from RH PUD to RM-9 PUD; from RR to RH PUD with Flex Zone; from RR to CR PUD with Flex Zone and from RR to CR PUD.
- Preliminary Plat

Case FS16-427 – Annexation*[†] **

Four of the five aforementioned requests will first be presented to the Planning and Zoning Commission, who will make a recommendation to the City Council. The first of the five requests involves the actual annexation of the property and will only be heard by the City Council. It is envisioned that all five requests will be presented to the City Council on January 17, 2017.

The following map depicts the county island status as currently existing and post-annexation.



* The annexation request was initially tied to FS16-391 and FS16-392; however, due to the differing land masses involved, the annexation was broken out from the other two cases and assigned its own case number.

** The blank petition relating to the proposed annexation was reviewed and heard by the City Council during a public hearing conducted on November 15, 2016 and is tentatively scheduled for final action by the City Council on January 17, 2017 together with the other related requests. Information regarding the proposed annexation is discussed under separate cover.

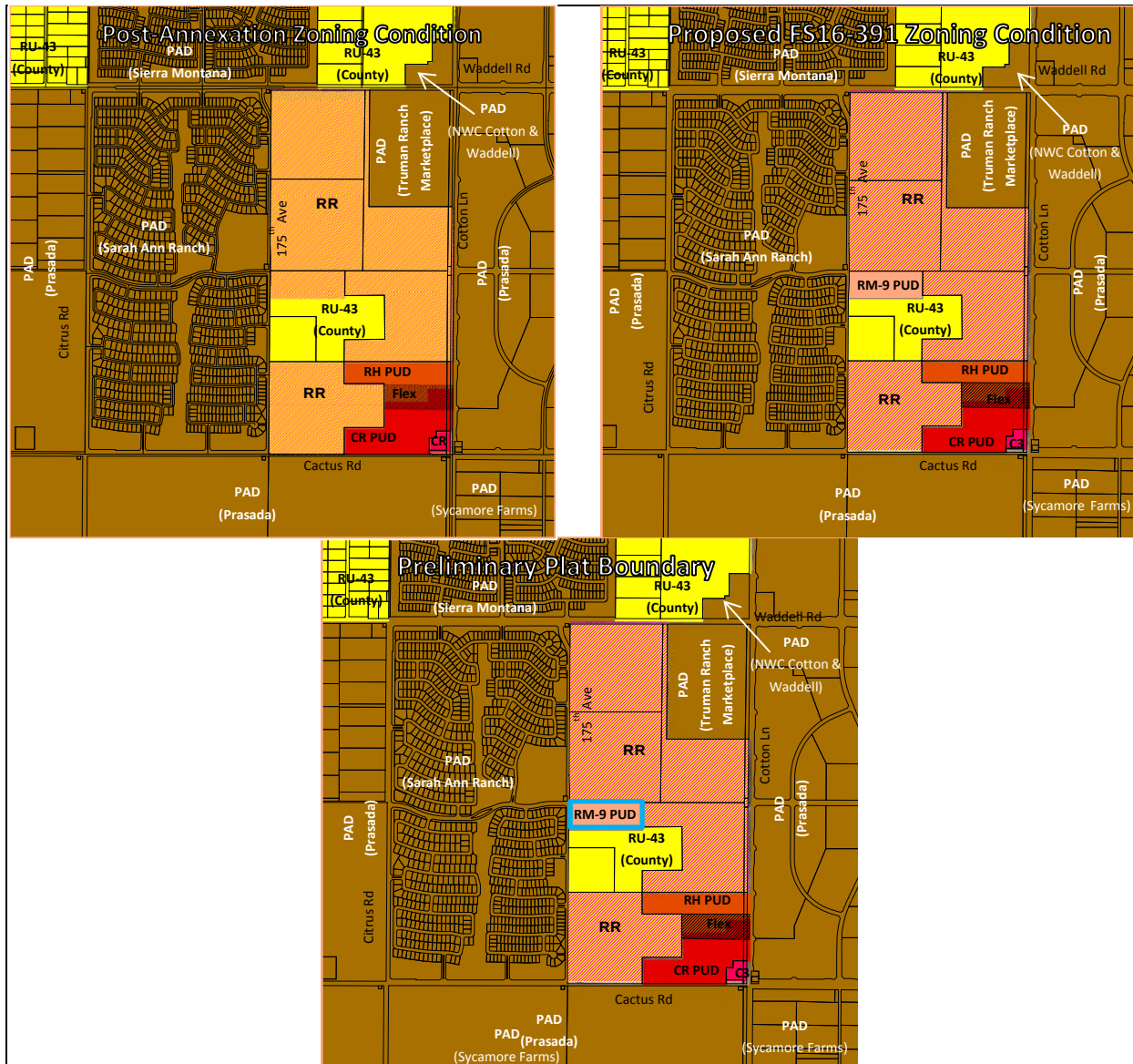
72 **Project Description:**

73
74 The subject request involves a 10-acre, 49-lot Preliminary Plat in the proposed RM-9 PUD zoning
75 district and anticipates the prior approval of the aforementioned annexation case proposed under
76 FS16-427, as well as the related zone change request under FS16-391. This Preliminary Plat also
77 anticipates the approval of the Preliminary Plat sought under case FS16-392 for the Magnolia
78 project as the two are interconnected as will be discussed later in this report. This Preliminary Plat
79 also anticipates a single lot product type, provides 2.4 acres of open space and implements the
80 development standards, amenities, and other design features of the PUD Overlay.

81
82 **Surrounding Land Zoning:**

83
84 The aforementioned annexation covers a large portion (approximately 203 acres) of the
85 unincorporated land located within the affected county island with the exception of any land
86 located north of Waddell Road as well as the Paradise Honors school campus. Similarly, the FS16-
87 391 Zone Change and Preliminary Plat only encompass a portion of the annexation area. The
88 following three (3) maps depict the post-annexation zoning condition, the proposed zoning
89 condition assuming the FS16-391 zone change is approved, and the subject Preliminary Plat.

90
91 [See map set on following page.]



Background:

July 28, 2016: Staff met with the applicant to discuss the project during a regularly scheduled Concept Review meeting under CR16-305.

August 8, 2016: Staff met with the applicant to discuss annexation logistics.

August 23, 2016: Staff met with the applicant to discuss product design.

September 12, 2016: The applicant filed a request for a Zone Change and Preliminary Plat under case FS16-391. The applicant filed a second request for a companion Zone Change and Preliminary Plat under case FS16-392. The latter also included an annexation request.

September 28, 2016: On behalf of the applicant, staff opened case FS16-427 relating to the annexation of the subject property.

October 19, 2015: The applicant held a neighborhood outreach meeting to discuss the project.

October 31, 2016: Staff met with the applicant to discuss review comments.

November 8, 2016: The applicant filed their second submittal for the subject case.

November 15, 2016: The City Council approved the blank annexation petition relating to the annexation of the subject property as well as other proximal properties under case FS16-427.

December 1, 2016: Staff met with the applicant to discuss the Final Plat relating to the project during a regularly scheduled Concept Review meeting under CR16-511.

December 15, 2016: The Commission continued the case to a date-certain of January 5, 2017 due to an advertising error.

January 5, 2017: The Zone Change and Preliminary Plat requests being processed under FS16-391 and FS16-392 are scheduled for review by the Planning and Zoning Commission; however, the Commission's recommendation is unknown as of the writing of this report.

Citizen Outreach:

The site was posted in accordance with the SUDC and state statute. The City of Surprise also sent notices via First Class mail in accordance with the SUDC and state statute. The applicant held a citizen outreach meeting on October 19, 2016, which was well attended. While staff has received no items of opposition or support for the project, the applicant's Citizen Participation Final Report indicates one (1) member of the public offered positive feedback and two (2) members of the public offered negative feedback. The summary report also indicated that seven (7) people offered neutral comments and suggestions. The body of the summary report is included as an attachment to this report.

Analysis and Discussion:

Unlike typical "PAD" zoning, the subject request falls under the current SUDC. As such, the uses associated with each of the proposed zoning districts are per Section 122-43 of the SUDC. The PUD Overlay proposed under the companion case, however, will allow certain deviations from the development standards as specified in the SUDC. The following table as taken from the zoning narrative expresses the proposed residential development standards applicable to the site. Those items expressed in red font deviate from the base standard. Also of note are several footnotes which serve to clarify how certain development standards are to be applied.

Table 1: RM-9 PUD Development Standards		
Development Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35
Footnotes:		
(1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a PUE, in which case the minimum front setback shall be 10').		
(2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.		
(3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.		

The subject Preliminary Plat proposes alley loaded products. The related zone change anticipates this lot product and includes a PUD Overlay to amend the development standards accordingly. The lot product is illustrated on Sheet 3 of the Preliminary Plat along with the Development Standards table included in the zoning narrative. Staff notes that considerable effort went into creating the development standards that would meet the objectives of the applicant while addressing staff concerns over as parking, trash collection, fire access, and proximity to public utility easements.

Sweetwater Avenue will bisect the site, with access to both Cotton Lane and 175th Avenue. The majority of Sweetwater Avenue is located within the Magnolia project; however, a small portion of that right-of-way located within the 175th & Sweetwater project. Since Sweetwater Avenue cohabitates both projects, it is essential that both Phase 1 of the Magnolia project be platted and developed concurrently with the 175th & Sweetwater project. As an alternative, Sweetwater Avenue could be implemented in its entirety through a Master Plat, a Map of Dedication or a combined Final Plat. Staff has included a stipulation to addresses this issue.

The 175th & Sweetwater project provides approximately 2.4 acres of open space, which includes perimeter and end-block landscape tracts, and co-use turf/retention areas. Although the amenities associated with this Preliminary Plat are minimal, the project is immediately adjacent to the highly amenitized Truman Community Center. Further, the intent is for this Preliminary Plat to integrate with the Magnolia project to the extent of being part of the same HOA. As with Magnolia, Sweetwater Avenue will be flanked on either side by a substantial open space tract thereby enhancing the openness of the neighborhood.

The development will include certain wall configurations, which are consistent with the Magnolia project. Figure 7 of the zoning narrative best illustrate the wall configuration, although the same are illustrated on Sheet WD-1 of the subject Preliminary Landscape Plan. The locations of these wall and entry features are expressed on Sheet W-1 of the Preliminary Landscape Plan.

The project will be well landscaped using a robust plant palette intended to enhance and reinforce the overall theme of the community. Most, but not all, of the plant species identified on the Preliminary Landscape Plan are included in the Arizona Department of Water Resources (ADWR) List of Drought Tolerant Plant Species. Several species listed on the Preliminary Landscape Plan, such as but not limited to the Magnolia tree, are not on the ADWR list; however, these plants will be used sparingly throughout the project. Staff notes that per the SUDC, only those plant species that are included in the ADWR list may be used within the public right-of-way. Further, the use of turf within the median of a public right-of-way is prohibited. The proposed landscape design meets these requirements.

Utility and Services Table:

Electric:	Arizona Public Service
Water:	EPCOR
Wastewater:	City of Surprise
Refuse:	City of Surprise
Natural Gas:	Southwest Gas
Irrigation:	Maricopa Water District
Schools:	Dysart USD

Conformance with Adopted Plans:

Surprise General Plan 2035: The Surprise General Plan 2035 shows the subject property as lying within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac or more, provided appropriate transitions are made between the various Neighborhood types included within the character area. The subject proposal contemplates up to 49 dwelling units, which equates to approximately 4.9 DU/Ac. As such the proposed zoning most closely aligns with the Suburban Neighborhood type and is consistent with the General Plan.

203 **Reviewing Agencies:**

204
205 **Luke Air Force Base (LAFB):** In a letter dated October 3, 2015 (attached), LAFB indicated that the
206 subject development met the Graduated Density Concept and would not interfere with flight
207 operations. LAFB also requested a robust notification program.

208
209 **Arizona Department of Transportation (ADOT):** In an email dated September 20, 2016 (attached),
210 ADOT indicated the proposed development would not affect any ADOT highway facilities.

211
212 **Maricopa Water District (MWD):** In a memo dated October 19, 2016 (attached), MWD indicated
213 the property covered by this application is subject to certain MWD interests including existing
214 facilities and other property interests. MWD requires that prior to Final Plat approval, certain
215 comments must be addressed.

216
217 **Surprise GIS:** City of Surprise GIS requires certain revisions relating to the AutoCAD files for the
218 project. Staff has included a stipulation to address this issue.

219
220 **Summary:**

221
222 The 175th & Sweetwater project is very well designed and is consistent with the General Plan and
223 SUDC as amended by the PUD Overlay. The proposed development standards requested under the
224 PUD Overlay will allow the applicant to develop the site in a creative manner in keeping with the
225 intent of the SUDC and satisfying staff concerns. Amenities included will provide recreational
226 opportunities for the neighborhood residents.

227
228 **Findings:**

- 229
230
 - The proposed Preliminary Plat is consistent with the zone change proposed under case
 - 231 FS16-391.
 - The proposed development standards will allow the property to be reasonably developed.

232
233
234 **Commission Recommendation:**

235
236 The Planning and Zoning Commission's recommendation is unknown as of the writing of this report;
237 however, based on the findings noted above, staff recommended the Commission forward a
238 recommendation of **approval** of the subject Preliminary Plat request to the City Council, subject to
239 stipulations 'a' through 'g' as outlined below:

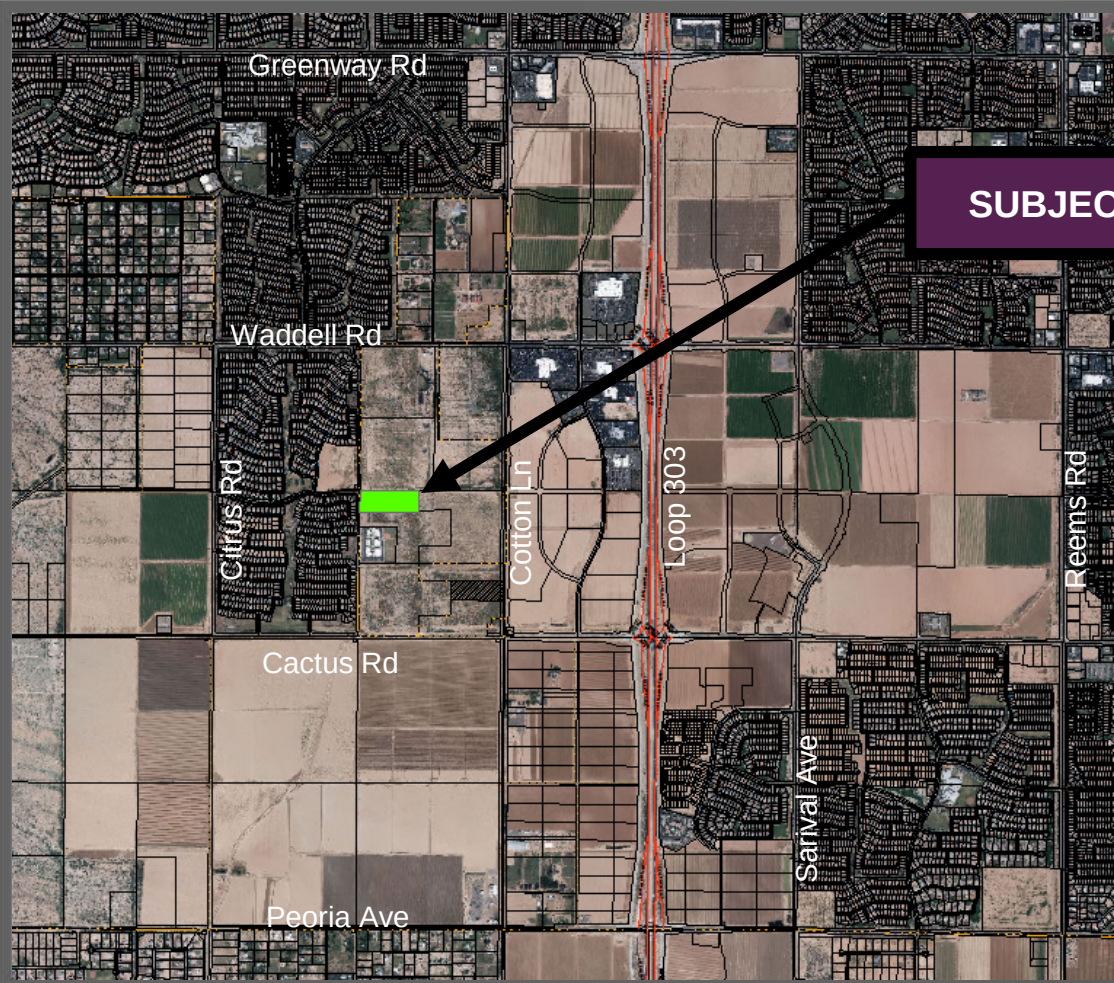
- 240
241
 - a. Development of the site shall be in substantial conformance with the Preliminary Plat
 - 242 entitled "S.E.C 175th Ave & Sweetwater", prepared by David Evans and Associates, dated
 - 243 revised November 2016 and stamped received November 28, 2016, except as modified by
 - 244 the following stipulations.

- b. Landscaping of the development shall be consistent with the Preliminary Landscape Plan entitled "175th & Sweetwater", Prepared by LVA Urban Design Studio, dated revised November 2016 and stamped received November 7, 2016, except as modified by the following stipulations.
- c. Final Platting of Phase I of the 175th & Sweetwater development shall occur concurrently with the Final Platting of the Magnolia development contemplated under FS16-392, unless an alternative methodology is approved by the City of Surprise with respect to the Sweetwater Avenue right-of-way.
- d. Prior to Final Plat approval, the applicant shall obtain approval from the Maricopa Water District with respect to the development's effect on MWD facilities.
- e. Within 30 days of approval of the subject Preliminary Plat by the City Council, the applicant shall submit revised AutoCAD drawings in accordance with City of Surprise GIS standards.
- f. Approval of this Preliminary Plat request presumes the approval of the rezone proposed under FS16-391. Should said rezone request fail, the subject Preliminary Plat granted under the subject approval is null and void.
- g. Non-compliance with the stipulations of approval of this case will be treated as a violation in accordance with the provisions of Article XIV of the Surprise Unified Development Code.

Staff will advise the City Council of the Commission's recommendation at a later date. The Council is free to accept the Commission's findings and recommendation; however, should the City Council wish to deny the request, the Council should make its own findings and base its decision on those alternative findings.

Attachments:

- 01 Vicinity Map (1 page)
- 02 Case Map (1 page)
- 03 Preliminary Plat (5 pages)
- 04 Preliminary Landscape Plan (5 pages)
- 05 Luke AFB comments (2 pages)
- 06 ADOT comments (1 page)
- 07 MWD comments (1 page)



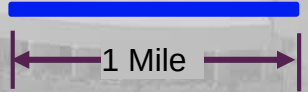
SUBJECT SITE

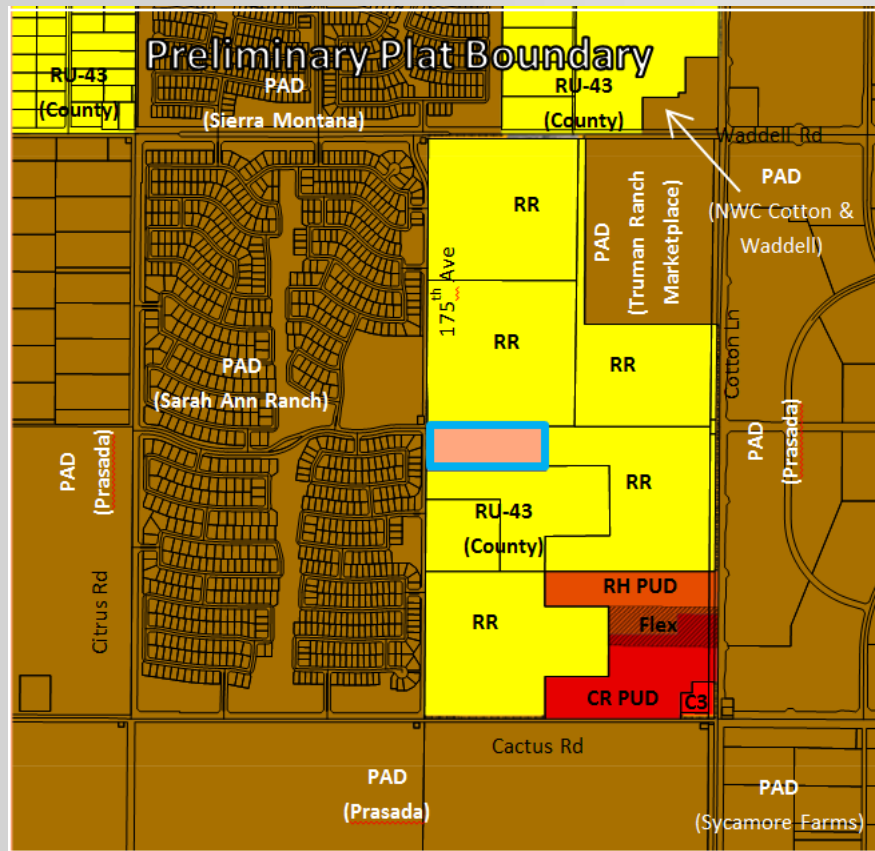
FS16-391
175th & Sweetwater
Preliminary Plat

Vicinity Map



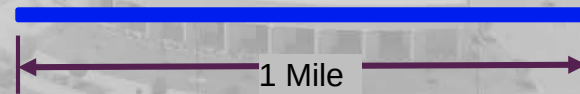
North





FS16-391 **175th &** **Sweetwater** **Preliminary Plat**

Case Map



P:\AZCD00000002\0400CAD\PL\ SHEETS\PRE-PLAT - PARCEL B\PL-PR-01-AZCD00002.dwg jct Nov 28, 2016 6:22:53am

LEGAL DESCRIPTION

THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA;

EXCEPT ONE–HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN DOCKET 854, PAGE 212; AND

EXCEPT THAT PART OF THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHEAST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 333.01 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89° 59' 50" WEST, ALONG SAID LINE, A DISTANCE OF 1,223.09 FEET TO A POINT THAT LIES 1,089.24 FEET EASTERLY OF THE SOUTH QUARTER CORNER OF SAID SECTION 14;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 381.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 573.52 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 633.80 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 575.97 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 316.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 1,484.01 FEET;

THENCE SOUTH 0° 22' 01" WEST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 999.62 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 150.00 FEET;

THENCE SOUTH 0° 22' 01" WEST, A DISTANCE OF 100.00 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 100.00 FEET;

THENCE SOUTH 0° 22' 01" WEST, A DISTANCE OF 233.00 FEET TO THE POINT OF BEGINNING; AND

EXCEPT THAT PART OF THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHEAST CORNER OF SAID SECTION 14, WHICH POINT BEARS SOUTH 0° 22' 01" WEST,A DISTANCE OF 2,640.39 FEET FROM THE EAST QUARTER CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 1,556.09 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89°59'50" WEST, ALONG SAID LINE, A DISTANCE OF 1,089.24 FEET TO THE SOUTH QUARTER CORNER OF SAID SECTION 14;

THENCE NORTH 0° 23' 49" EAST, ALONG THE MID–SECTION LINE, A DISTANCE OF 1,332.63 FEET; THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 1,077.62 FEET;

THENCE SOUTH 0° 00' 10" WEST, A DISTANCE OF 316.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 575.97 FEET;

THENCE SOUTH 0° 00' 10" WEST, A DISTANCE OF 633.80 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 573.52 FEET;

THENCE SOUTH 0° 00' 10" WEST, A DISTANCE OF 381.90 FEET TO THE POINT OF BEGINNING;

EXCEPT ONE–HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN DOCKET 854, PAGE 212; AND

EXCEPT THAT PART OF THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHEAST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET;

THENCE NORTH 0° 22' 01" EAST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 1,332.63 FEET TO THE POINT OF BEGINNING;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 1,484.01 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 316.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 584.03 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 633.80 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 570.97 FEET; THENCE NORTH 0° 00'10" EAST, A DISTANCE OF 356.92 FEET;

THENCE NORTH 89° 59' 55" EAST, ALONG THE NORTH LINE OF THE SOUTHEAST QUARTER OF SAID SECTION 14, A DISTANCE OF 1,479.27 FEET;

THENCE SOUTH 0° 22' 01" WEST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14,A DISTANCE OF 1,307.75 FEET TO THE POINT OF BEGINNING;

EXCEPT ONE–HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN DOCKET 854, PAGE 212; AND

S.E.C. 175TH AVE & SWEETWATER
PRELIMINARY PLAT
SURPRISE, ARIZONA

A PORTION OF THE SOUTHEAST QUARTER OF SECTION 14,
TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA & SALT RIVER
MERIDIAN, MARICOPA COUNTY, ARIZONA

LEGAL DESCRIPTION (CONTINUED)

EXCEPT THAT PART OF THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHEAST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89° 59' 50" WEST, ALONG SAID LINE, A DISTANCE OF 250.01 FEET; THENCE NORTH 0° 22' 01" EAST, A DISTANCE OF 233.00 FEET; THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 100.00 FEET;

THENCE NORTH 02° 22' 01" EAST, A DISTANCE OF 100.00 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 150.00 FEET;

THENCE SOUTH 0° 22' 01" WEST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 333.01 FEET TO THE POINT OF BEGINNING;

EXCEPT ANY PORTION OF SAID PROPERTY LYING WITHIN THAT CERTAIN RAILROAD RIGHT OF WAY FOR THE MAIN SPUR OF THE CALIFORNIA, ARIZONA AND SANTA FE RAILWAY CO., EXTENDING FROM BEARDSLEY STATION, AS CONVEYED BY DEED RECORDED IN BOOK 215 OF DEEDS, PAGE 133, RECORDS OF MARICOPA COUNTY, ARIZONA; AND

EXCEPT ONE–HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN DOCKET 854, PAGE 212; AND

EXCEPT THAT PART OF THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHEAST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 59" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET;

THENCE NORTH 00° 21' 47" EAST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 1,332.65 FEET;

THENCE SOUTH 89° 59' 59" WEST, A DISTANCE OF 1,889.58 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING SOUTH 89° 59' 59" WEST, A DISTANCE OF 672.15 FEET;

THENCE NORTH 00° 23' 51" EAST, ALONG THE WEST LINE OF THE SOUTHEAST QUARTER OF SAID SECTION 14,A DISTANCE OF 648.08 FEET;

THENCE NORTH 89° 59' 59" EAST, A DISTANCE OF 672.15 FEET;

THENCE SOUTH 00° 23' 51" WEST, A DISTANCE OF 648.08 FEET TO THE POINT OF BEGINNING; AND

EXCEPT THAT PART OF THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHEAST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET;

THENCE NORTH 0° 21' 47" EAST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 1,332.65 FEET;

THENCE SOUTH 89° 59' 59" WEST, A DISTANCE OF 1,484.06 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING SOUTH 89° 59' 59" WEST, A DISTANCE OF 405.52 FEET;

THENCE NORTH 0° 23' 51" EAST, A DISTANCE OF 648.08 FEET;

THENCE SOUTH 89° 59' 59" WEST, A DISTANCE OF 672.15 FEET TO THE WEST LINE OF THE SOUTHEAST QUARTER OF SAID SECTION 14;

THENCE NORTH 0° 23' 51" EAST, A DISTANCE OF 258.08 FEET ALONG SAID WEST LINE TO THE SOUTH LINE OF THE NORTH 401.53 FEET OF SAID SOUTHEAST QUARTER;

THENCE NORTH 89° 59' 55" EAST, 1,084.44 FEET ALONG SAID SOUTH LINE;

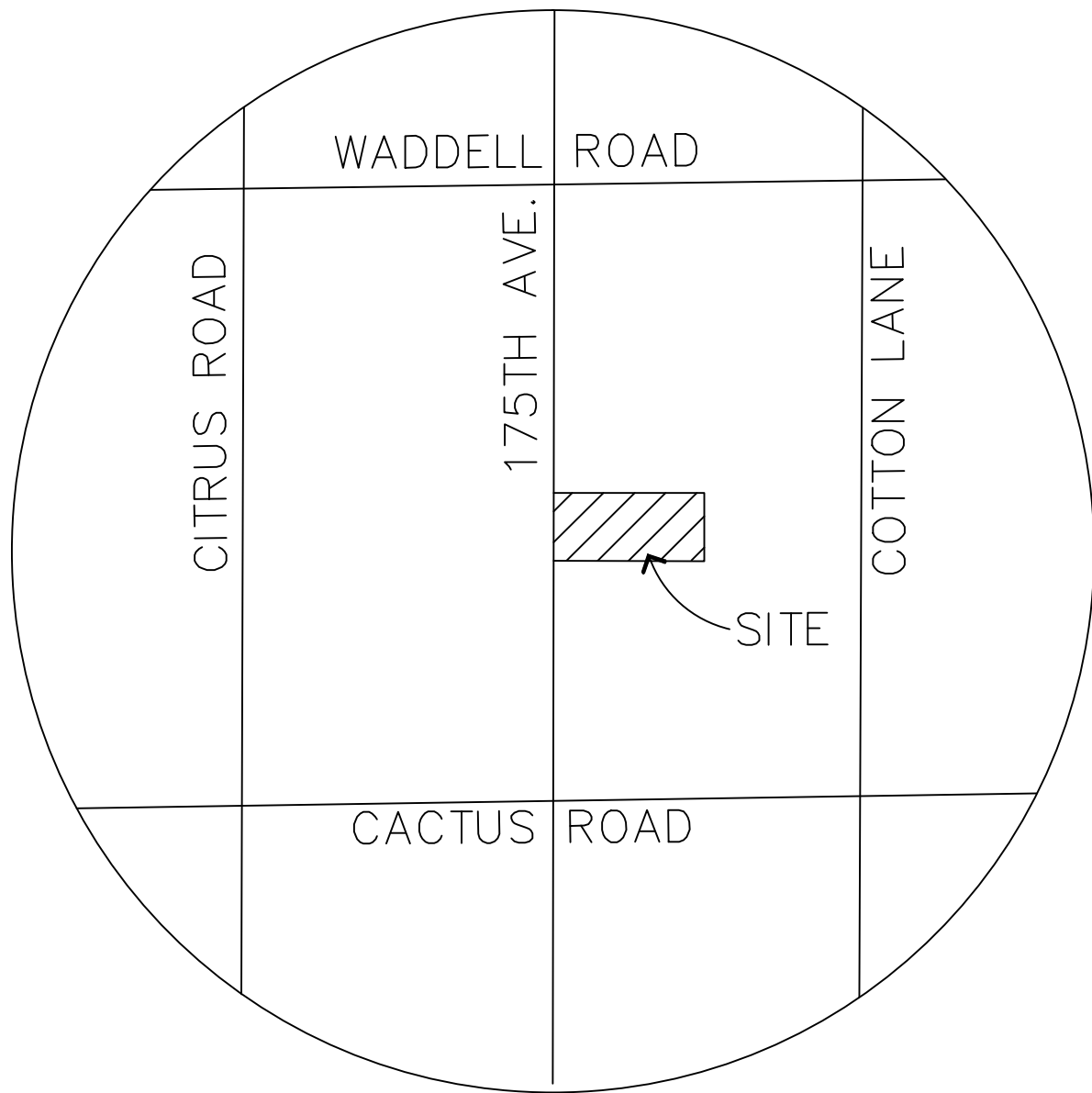
THENCE NORTH 0° 00' 16" WEST, A DISTANCE OF 44.60 FEET;

THENCE SOUTH 89° 59' 53" EAST, A DISTANCE OF 570.96 FEET;

THENCE SOUTH 0° 00' 03" WEST, A DISTANCE OF 633.83 FEET;

THENCE NORTH 89° 59' 48" WEST, A DISTANCE OF 584.03 FEET;

THENCE SOUTH 0° 00' 15" WEST, A DISTANCE OF 316.95 FEET TO THE POINT OF BEGINNING.



VICINITY MAP

SECTION 14, T3N, R2W
NTS

SITE DATA

EXISTING ZONING:	RM–9 PUD
GROSS AREA:	10.0 AC
NET AREA:	9.1 AC
LOT COUNT:	49 LOTS
DENSITY:	5.5
OPEN SPACE AREA:	2.4 AC

Development Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	to be determined	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space and side entry garage shall have a minimum 8' setback for (unless adjacent to a PUE, in which case the minimum front setback shall be 10').
- (2) Where an 8' PUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the PUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building wher adjacent to a public street.

FLOOD ZONE CERTIFICATION

THIS IS TO CERTIFY THAT THE SURVEYED PROPERTY IS LOCATED WITHIN THE ZONE "X" FLOOD HAZARD AREA PER FIRM MAP PANEL NUMBER 04013C1660L DATED OCTOBER 16, 2013, AS PUBLISHED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA). THE FLOOD ZONE BOUNDARY IS LOCATED BY SCALED MAP LOCATION AND GRAPHIC PLOTTING ONLY.

SHADED ZONE "X" AS DEFINED BY FEMA IS:
AREAS OF 0.2% ANNUAL CHANCE FLOOD; AREAS OF 1% ANNUAL CHANCE FLOOD WITH AVERAGE DEPTHS OF LESS THAN 1 FOOT OR WITH DRAINAGE AREAS LESS THAN 1 SQUARE MILE; AND AREAS PROTECTED BY LEVEES FROM 1% ANNUAL CHANCE FLOOD.

DEVELOPER

SURPRISE VILLAGE PARTNERS, LLC
11024 N. 28TH DRIVE, SUITE 170
PHOENIX, 85029

PHONE: (602) 499–0899
CONTACT: JOSEPH KALISH

PLANNER

LVA URBAN DESIGN STUDIO
120 SOUTH ASH AVENUE
TEMPE, ARIZONA 85281
CONTACT: MARK REDDIE
PHONE: (480) 994–0994

ENGINEER

DAVID EVANS AND ASSOCIATES, INC.
4600 EAST WASHINGTON STREET, SUITE 250
PHOENIX, ARIZONA 85034

PHONE: (602) 678–5151
FAX: (602) 678–5155
CONTACT: RAMZI GEORGES, PE
e–mail: ryg@deainc.com

SHEET INDEX

- | | |
|---|-----------------------------------|
| 1 | COVER SHEET/KEY MAP |
| 2 | STREET CROSS SECTIONS |
| 3 | DETAILS |
| 4 | PRELIMINARY PLAT |
| 5 | SOLID WASTE COLLECTION ROUTE PLAN |

BASIS OF BEARING

SOUTH 89°48'58" WEST, THE MEASURED BEARING BETWEEN A FOUND CITY OF SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND COTTON LANE AND A FOUND CITY OF SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND 175TH AVENUE, AS SHOWN HEREON, UTILIZING THE LEICA SMARTNET GPS NETWORK.

RELATIVE TO MARICOPA COUNTY, ARIZONA LOW DISTORTION PROJECTION

LINEAR UNIT:	INTERNATIONAL FEET
GEODETIC DATUM:	NAD 1983
PROJECTION TYPE:	LAMBERT CONFORMAL CONIC (SINGLE PARALLEL)

LATITUDE OF ORIGIN:	33°15'00" N
CENTRAL MERIDIAN:	112°15'00" W
FALSE NORTHING:	1,500,000.000 ift
FALSE EASTING:	2,500,000.000 ift
STANDARD PARALLEL SCALE:	1.000045 (EXACT)

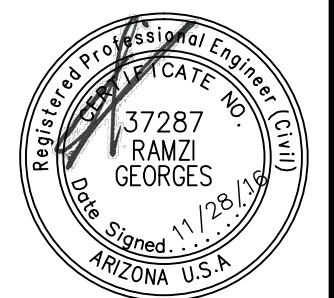
BENCHMARK

2 INCH CITY OF SURPRISE BRASS DISK WITH RAISED DATUM POINT – MARKED CITY OF SURPRISE BENCHMARK COT1 2009.7 – LOCATED ON TOP OF DRAINAGE SCUPPER APPROXIMATELY 700 FEET NORTH OF THE INTERSECTION OF CACTUS ROAD AND COTTON LANE ON THE EAST SIDE OF COTTON LANE.

ELEVATION 1248.65 NORTH AMERICAN VERTICAL DATUM 1988 (NAVD88)

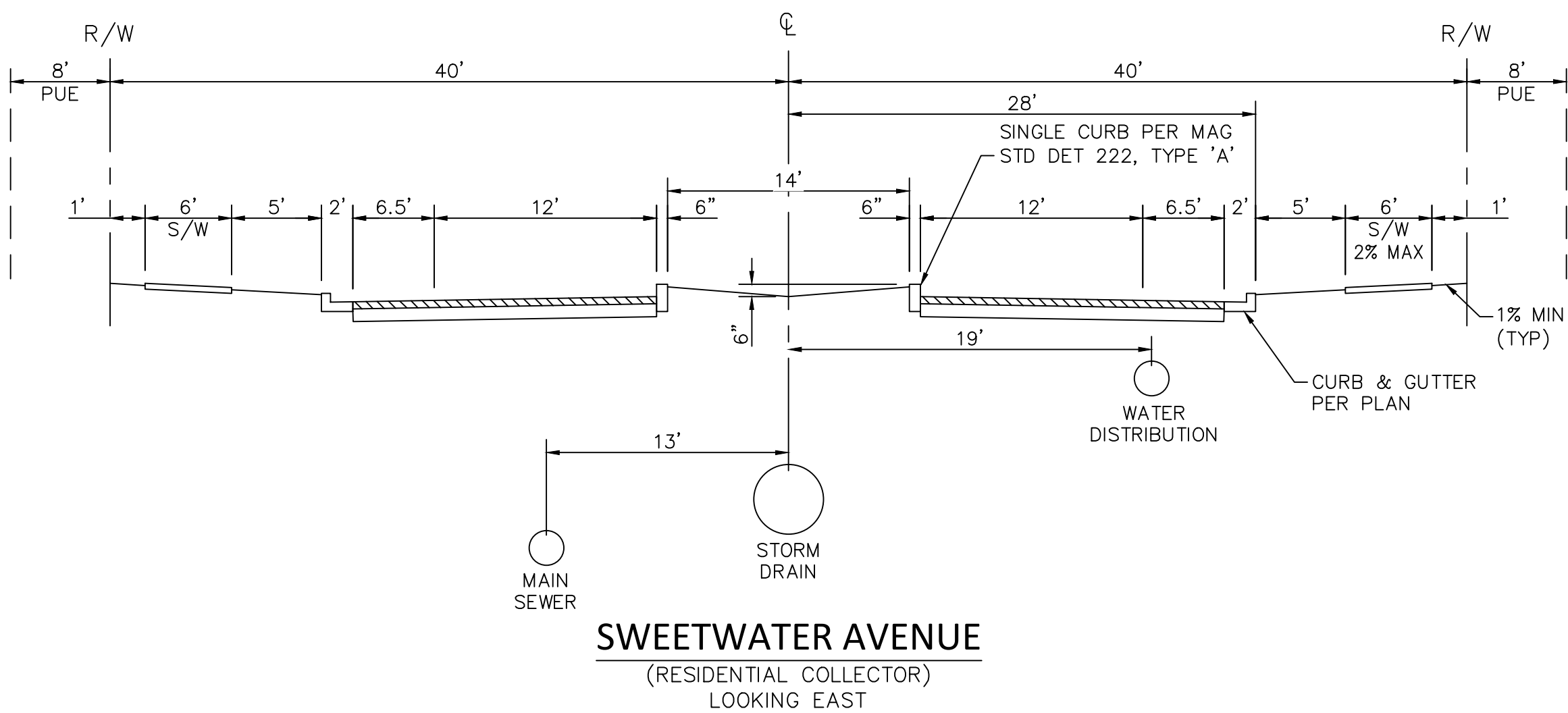
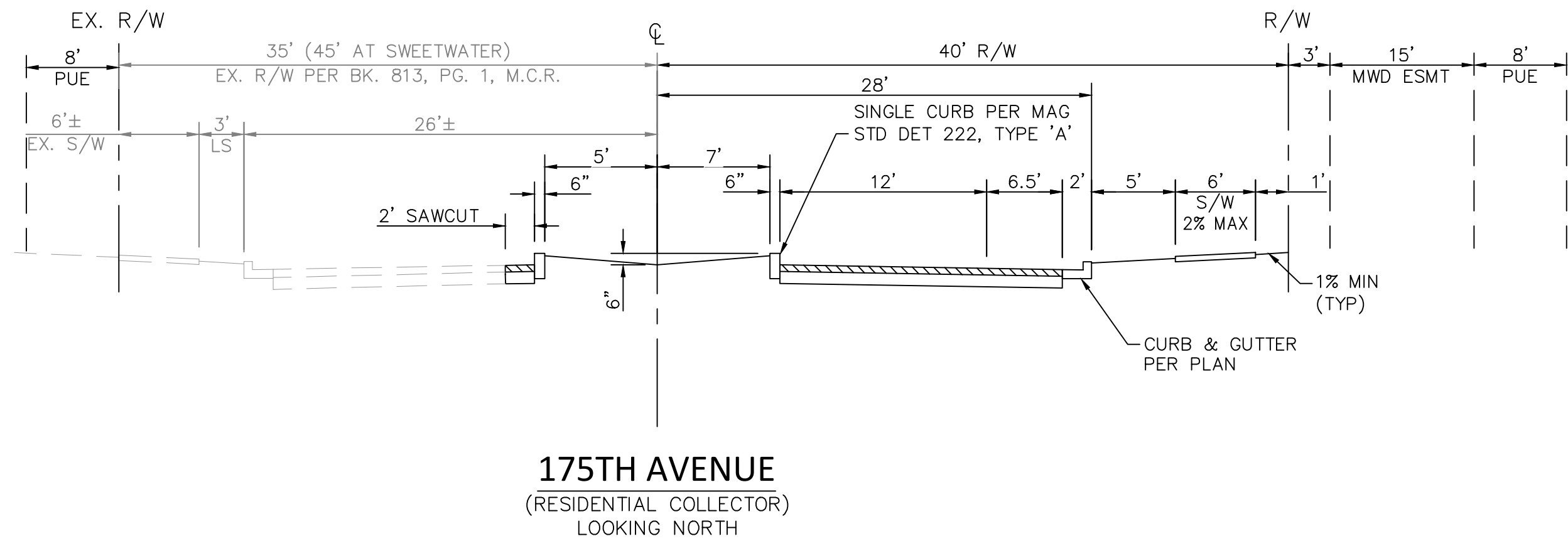
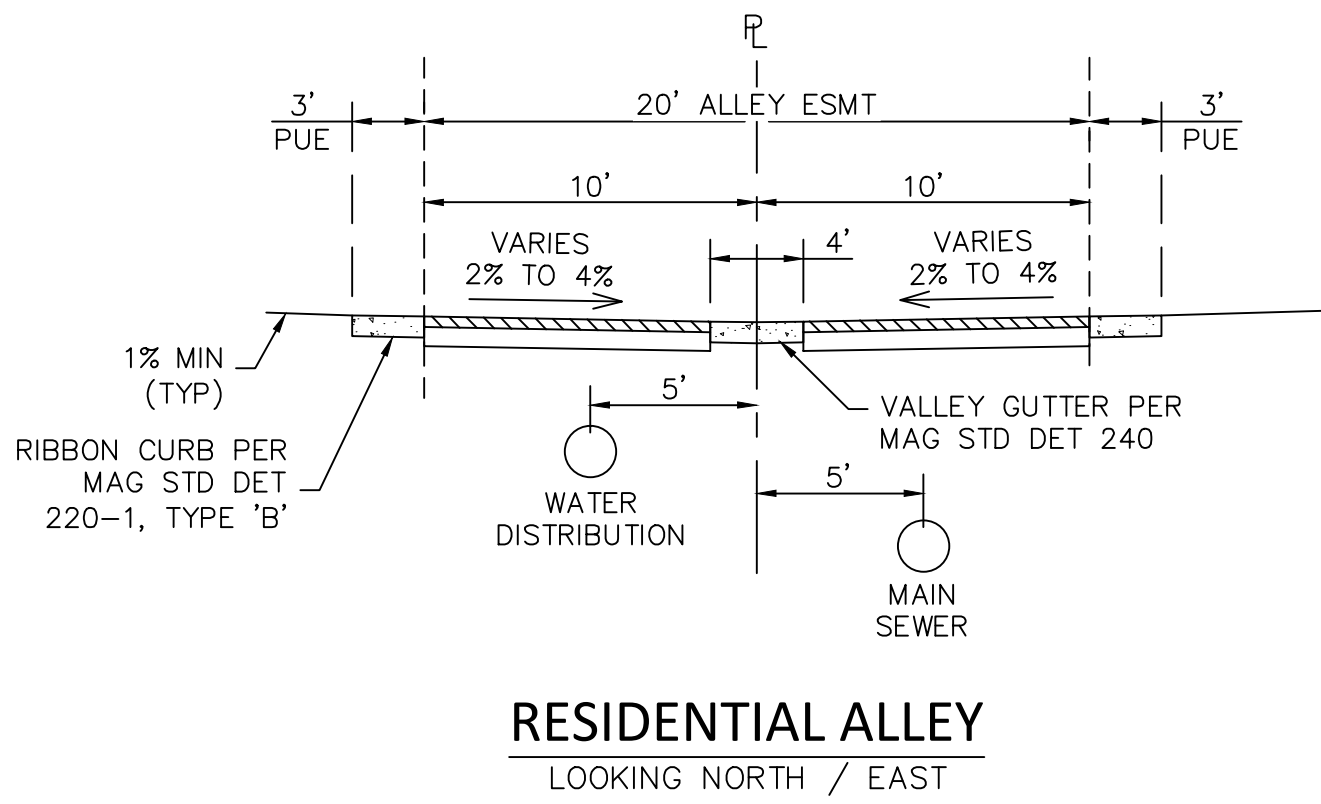
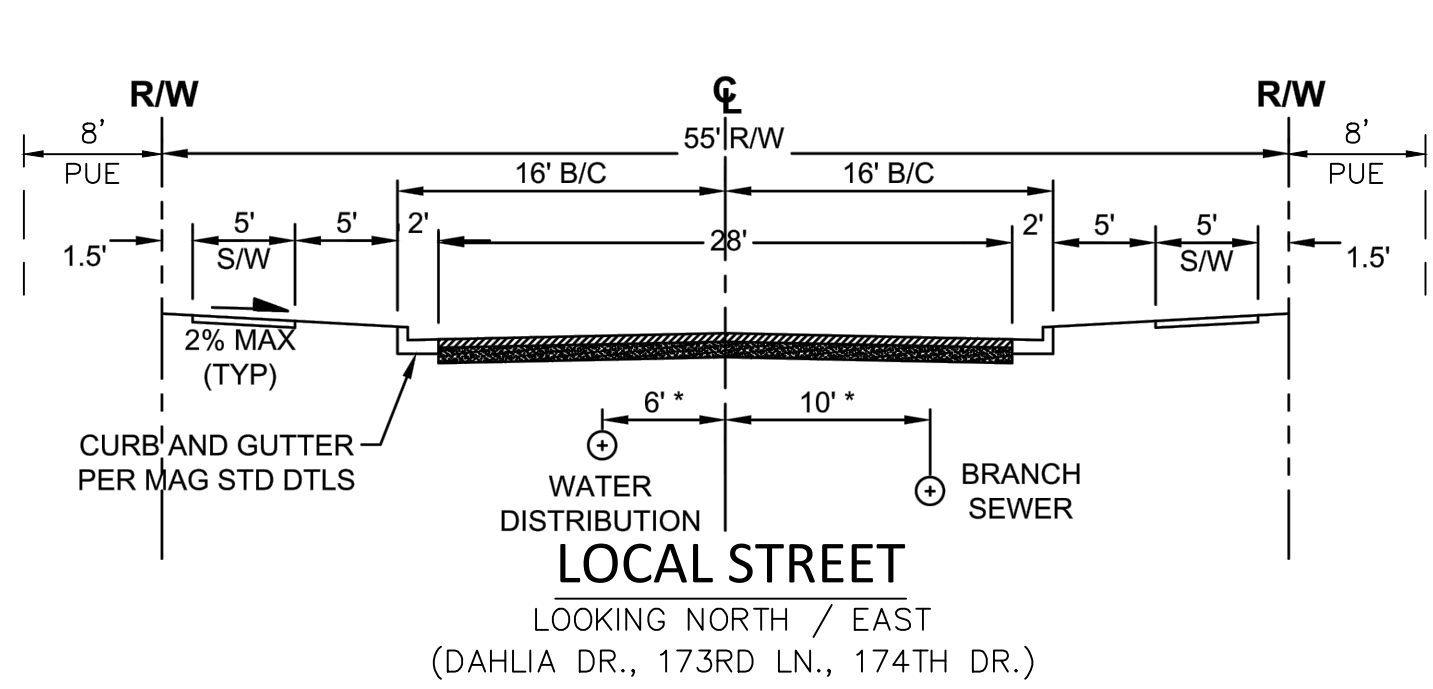
LEGEND

- CENTERLINE
- RIGHT OF WAY
- PROPERTY LINE
- EASEMENT
- E — ELECTRICAL
- G — GAS
- SS — SANITARY SEWER
- T — TELEPHONE
- W — WATER
- OHE — OVERHEAD ELECTRIC
- FLOW LINE
- STORM DRAIN
- SEWER MANHOLE
- UTILITY POLE / RISER
- ▭ CATCH BASIN
- STORM DRAIN MANHOLE
- ✕ SIGN
- FIRE HYDRANT
- GRADE BREAK

PROJECT MANAGER: RAMZI GEORGES, P.E.				
DESIGNED BY:	DRAWN BY:	CHECKED BY: RYG	DATE: 11/2016	
 DAVID EVANS AND ASSOCIATES INC. 4600 E Washington Street, Suite 250 Phoenix Arizona 85034 Phone: 602.678.5151				
				
PRELIMINARY PLAT FOR SEC 175TH AVE. & SWEETWATER CITY OF SURPRISE, ARIZONA				
ANNEXATION CASE #: FS16–427 ZONING CASE #: FS16–392				
SECTION: 14 TWNSHP: 3N RANGE: 2W				
JOB NO.: AZCD0002				
SHEET 1 OF 5				



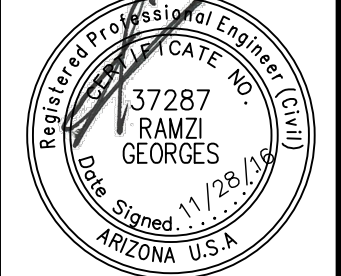
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PROJECT MANAGER:	RAMZI GEORGES, P.E.
DESIGNED BY:	
DRAWN BY:	
CHECKED BY:	RYG
DATE:	11/2016



**DAVID EVANS
AND ASSOCIATES INC.**
4600 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151



EXPIRES: 3/31/2017

**STREET SECTIONS & DETAILS
FOR
SEC 175TH AVE. & SWEETWATER
CITY OF SURPRISE, ARIZONA**

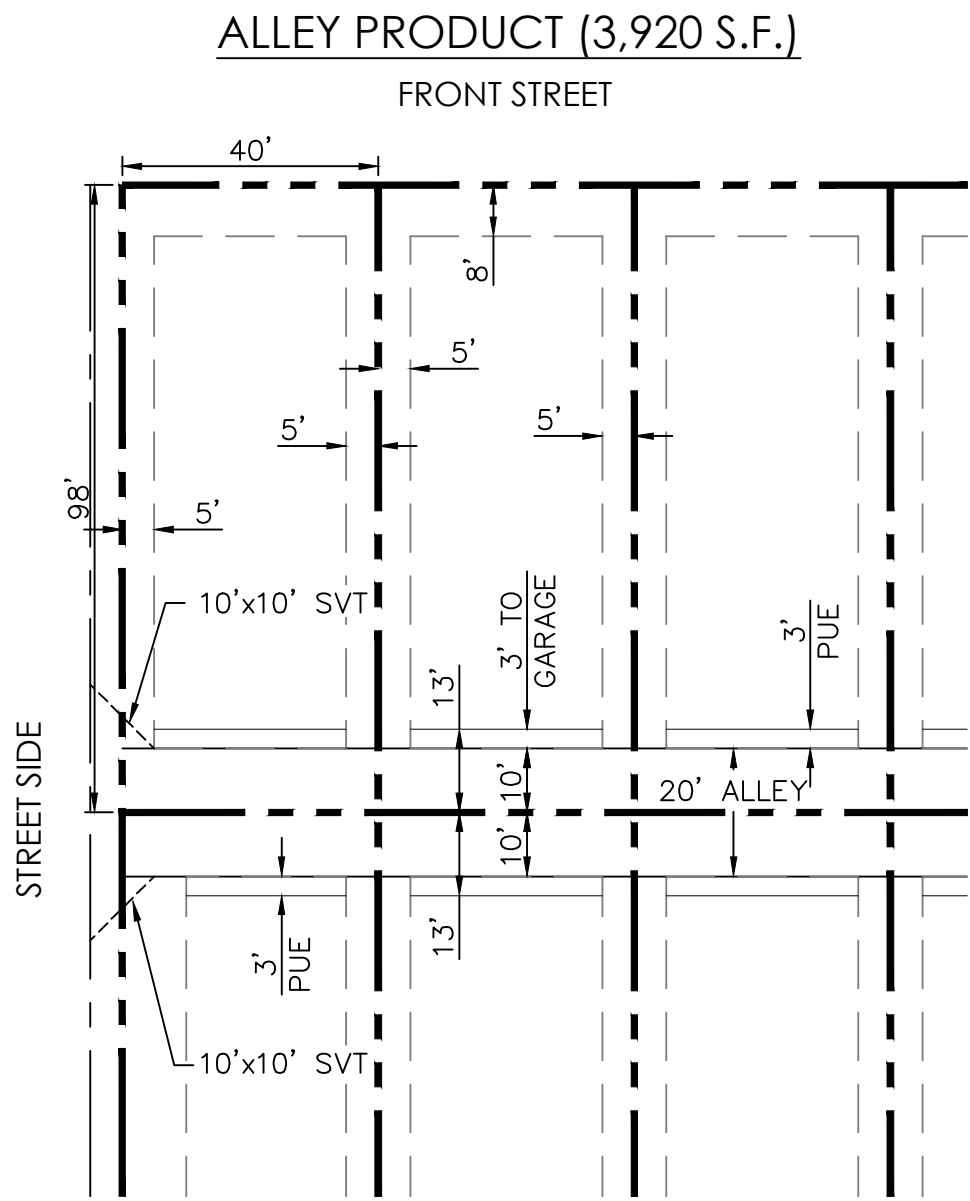
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TWNSH: 3N
RANGE: 2W

JOB NO.:
AZCD0002

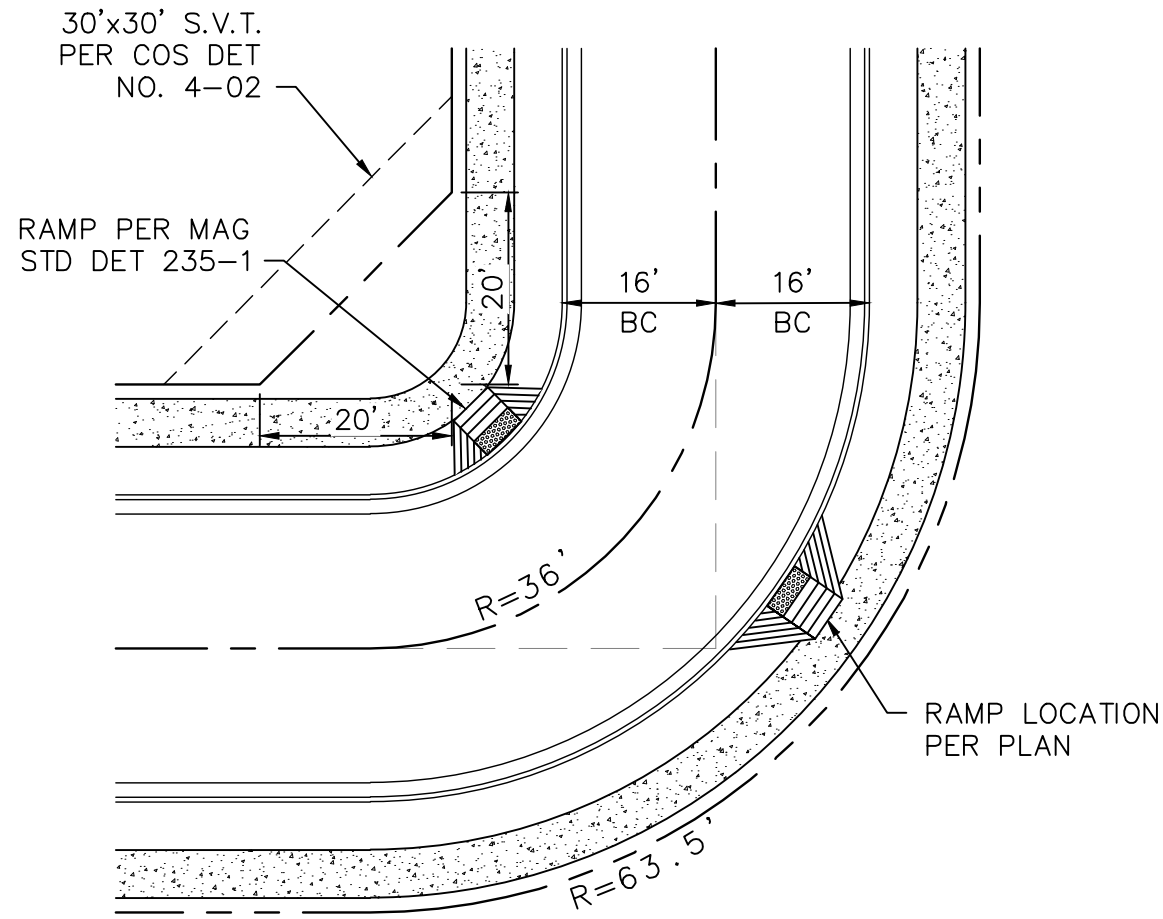
SHEET
2 OF 5



P:\A\AZCD000000002\0400CAD\PL\SHEETS\PRE-PLAT - PARCEL B\PI-PR-02-AZCD00002.dwg jcf Nov 28, 2016 6:25:04am



FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
REAR: (ALLEY)	13'



TYPICAL ELBOW GEOMETRY

1"=20'



DETAILS
FOR
SEC 175TH AVE. & SWEETWATER
CITY OF SURPRISE, ARIZONA

EXPIRES: 3/31/2017



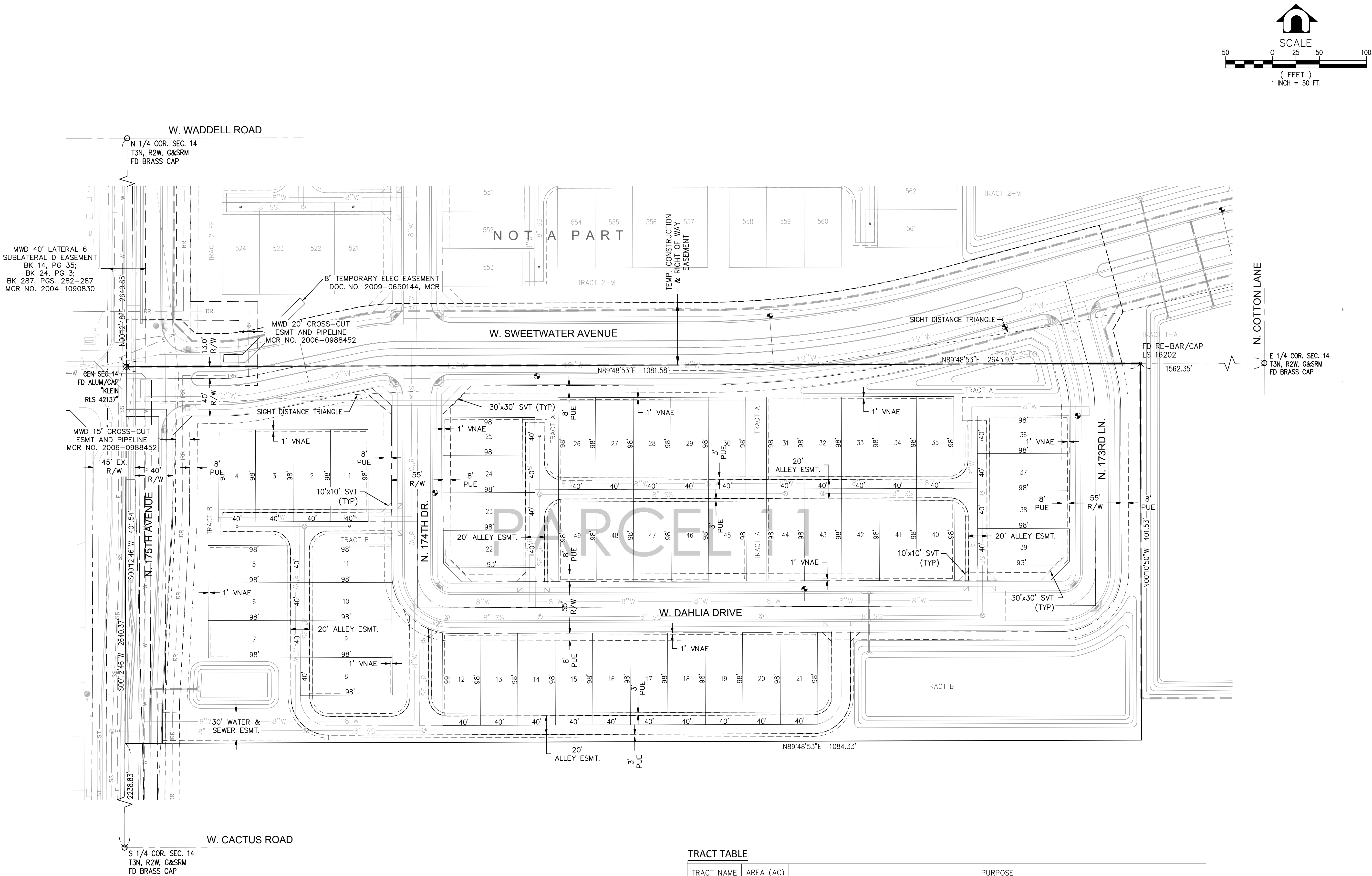
**DAVID EVANS
AND ASSOCIATES INC.**
4600 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
DATE: 11/2016

PROJECT MANAGER: RAMZI GEORGES, P.E.

SECTION: 14
TWNSHP: 3N
RANGE: 2W
JOB NO.:
AZCD0002
SHEET
3 OF 5

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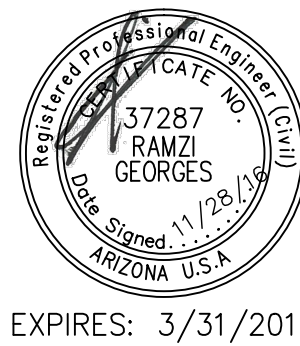
TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE
A	0.794	OPEN SPACE, ALLEY EASEMENT, SIDEWALK EASEMENT, DRAINAGE, AND COMMUNITY AMENITIES
B	2.374	OPEN SPACE, ALLEY EASEMENT, SIDEWALK EASEMENT, SEWER EASEMENT, DRAINAGE, AND COMMUNITY AMENITIES
TOTAL	3.168	

NOTE:
INDIVIDUAL LOT TABLES TO BE PROVIDED
ON FINAL PLAT.



PRELIMINARY PLAT
FOR
SEC 175TH AVE. & SWEETWATER
CITY OF SURPRISE, ARIZONA

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W
JOB NO.:
AZCD00002
SHEET
4 OF 5

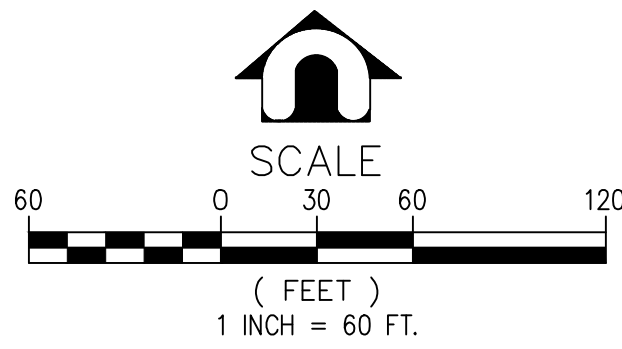
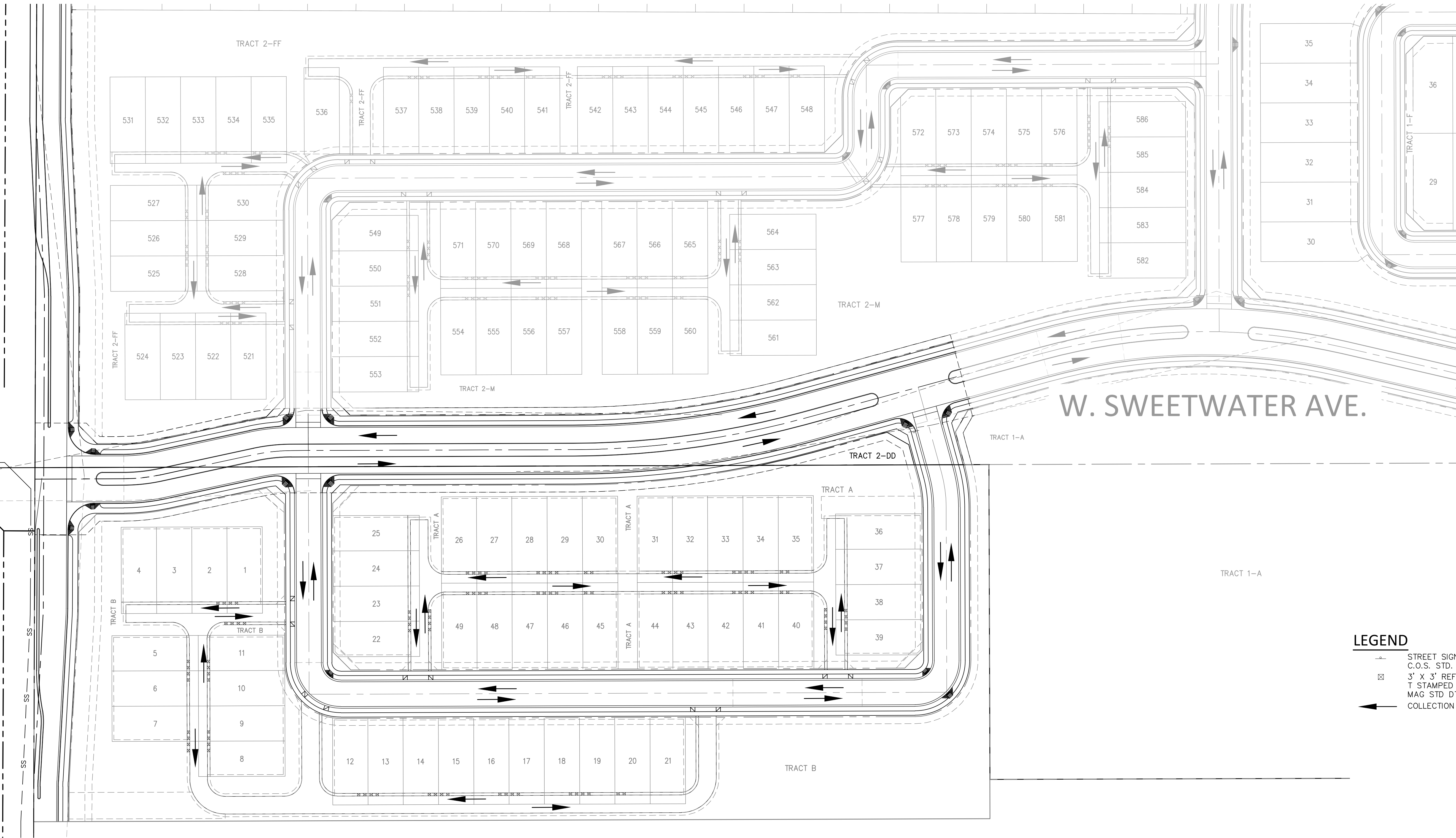


DAVID EVANS
AND ASSOCIATES INC.
4600 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
DATE: 11/2016
PROJECT MANAGER: RAMZI GEORGES, P.E.

P:\A\AZCD000000002\0400CAD\EC\EXHIBITS\EC-AZCD0002-- Waste Route.dwg jcf Nov 23, 2016 11:42:38am

175TH AVENUE



- LEGEND**
- STREET SIGN FOUNDATION, C.O.S. STD. DTL 4-22
 - 3' X 3' REFUSE BIN, PROVIDE T STAMPED INTO CURB PER MAG STD DTL 440-4
 - COLLECTION ROUTE

SOLID WASTE COLLECTION ROUTE
FOR
SEC 175TH AVENUE AND SWEETWATER
CITY OF SURPRISE, ARIZONA

SECTION: 14
TWN: 3N
RANGE: 2W
JOB NO.:
AZCD0002
SHEET
OF
5



EXPIRES: 3/31/2017

**DAVID EVANS
AND ASSOCIATES INC.**
4600 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602.678.5151

DESIGNED BY: .
DRAWN BY: .
CHECKED BY: RYG
DATE: 11/2016

PROJECT MANAGER:
RAMZI GEORGES, P.E.



175TH & SWEETWATER

SURPRISE, ARIZONA

BY: AZ COMMUNITY DEVELOPMENT, LLC

PRELIMINARY LANDSCAPE PLAN

LANDSCAPE NOTES

- ALL PLANTING AREAS ARE TO HAVE DECOMPOSED GRANITE, 1/2" MINUS COLOR AS SPECIFIED., 2" DEPTH, TYP.
- NO PLANT SUBSTITUTIONS ALLOWED UNLESS APPROVED IN WRITING. BY LANDSCAPE ARCHITECT AND CONFORMING TO LOCAL AGENCY'S APPROVED PLANT LIST.
- LANDSCAPE ARCHITECT / OWNER'S REP IS TO APPROVE ALL PLANT MATERIAL PRIOR TO DELIVERY TO SITE. ONE WEEK MINIMUM NOTICE.
- LANDSCAPE CONTRACTOR IS RESPONSIBLE TO VERIFY ALL CONDITIONS ON SITE PRIOR TO PROJECT START-UP.
- LANDSCAPE CONTRACTOR IS RESPONSIBLE TO REPAIR ANY DAMAGES MADE TO EXISTING LANDSCAPING, UNDERGROUND UTILITIES, IRRIGATION LINES, ELECTRICAL LINES, ETC., AT HIS EXPENSE.
- ANY PLANT MATERIAL NOT SHOWN TO REMAIN ON PLAN IS TO BE REMOVED.
- ADJUST ALL NEW LANDSCAPING AS NECESSARY TO ACCOMMODATE EXISTING LANDSCAPE TO REMAIN.
- CONTRACTOR IS TO VERIFY LOCATIONS OF ALL UNDERGROUND UTILITIES PRIOR TO ANY SITE WORK BEING EXECUTED.
- QUANTITIES ON PLAN ARE PROVIDED FOR BIDDING PURPOSES ONLY. LANDSCAPE CONTRACTOR IS RESPONSIBLE TO VERIFY ALL QUANTITIES PRIOR TO CONSTRUCTION.
- ALL AREAS DISTURBED DURING CONSTRUCTION ARE TO BE FINE GRADED AND TREATED TO BLEND EVENLY WITH ALL NEWLY CONSTRUCTED AREAS.
- LANDSCAPE ARCHITECT / OWNERS REPRESENTATIVE RESERVES THE RIGHT TO REJECT ANY PLANT MATERIAL THAT IS DETERMINED TO NOT SATISFY THE DESIGN INTENT OF THE LANDSCAPE PLAN BASED ON SIZE, SHAPE, APPEARANCE, HEALTH, OR IMPROPER CARE.
- ALL BOULDERS ARE TO BE GRANITE 'SURFACE SELECT', SIZE PER PLAN. ALL BOULDERS ARE TO BE BURIED 1/3 IN SOIL.
- ALL SWALE CHANNELS ARE TO HAVE 1" - 3" RIVER ROCK OR OTHER APPROVED STONE MATERIAL INSTALLED TO PREVENT EROSION.
- ALL DOWNSPOUTS / SCUPPERS ARE TO HAVE 3"x3", 3" - 6" RIVER ROCK OR OTHER APPROVED STONE MATERIAL INSTALLED TO PREVENT EROSION.
- ALL BERM CONTOUR INTERVALS ARE AT 1'-0", SLOPES NOT TO EXCEED 4:1.
- ALL TURF IS TO BE BERMUDA HYBRID. MAY BE INSTALLED AS SOD OR HYDROSEED.
- ALL HEADER IS TO BE EXTRUDED CONCRETE CURBING OR EQUAL.
- 100 PERCENT OF ALL RIGHT OF WAY PLANT MATERIAL IS TO BE FOUND ON THE ARIZONA DEPARTMENT OF WATER RESOURCES LOW WATER USE LIST.
- TREES WITH THORNS ARE NOT TO BE LOCATED WITHIN RECREATION AREAS, AND SHALL BE SET A MINIMUM OF 10' AWAY FROM ALL PEDESTRIAN ROUTES.
- ALL SIDEWALKS AND COMMUNITY TRAILS ARE 6' WIDE.
- TREES THAT OVERHANG THE CITY STREETS MUST BE TRIMMED UP TO A CLEAR HEIGHT OF NOT LESS THAN 15'
- TREES WITHIN SIGHT DISTANCE LINES SHALL BE MAINTAINED SO THAT NO LIMBS, LEAVES NEEDLES OR OTHER FOLIAGE ABOVE 30 INCHES OR BELOW 84 INCHES. TREES SHALL NOT OBSTRUCT MORE THAN 20% OF THE VISIBILITY WHEN COMBINED WITH OTHER OBSTRUCTIONS PRESENT.

CITY NOTES

- ALL CHANGES TO BE APPROVED BY THE CITY OF SURPRISE PLANNING DEPARTMENT.
- SIGNS REQUIRE A SEPARATE PERMIT.
- ALL UTILITY BOXES AND STRUCTURES ARE TO BE SCREENED FROM VIEW.
- PLANT MATERIAL IS NOT TO BE LOCATED WITHIN 3 FEET OF ANY FIRE HYDRANT OR FIRE DEPARTMENT CONNECTION.
- ROOT BARRIER PER CITY OF SURPRISE EDS 8-14 IS REQUIRED FOR ANY TREE LOCATED WITH THREE (3) FEET OF ANY SIDEWALK, CURB, PAVEMENT OR WALL.
- ALL PLANT MATERIAL SIZES ARE TO BE CONSISTENT WITH ANA STANDARDS.
- ALL PLANT MATERIAL LOCATED WITHIN VISIBILITY TRIANGLES ARE TO BE MAINTAINED NO HIGHER THAN 30 INCHES HIGH, AND HANG NO LOWER THAN 7 FEET FROM GROUND ELEVATION, INCREASING TO 10' CLEARANCE WHERE APPROACHING STOP SIGNS.
- TRAILS AND PATHWAYS ARE TO BE ADA COMPLIANT, WHERE PRACTICAL.
- SIDEWALKS AND SIDEWALK SEPERATION WILL CONFORM TO THE CITY OF SURPRISE PLANNING AND DESIGN GUIDELINES.

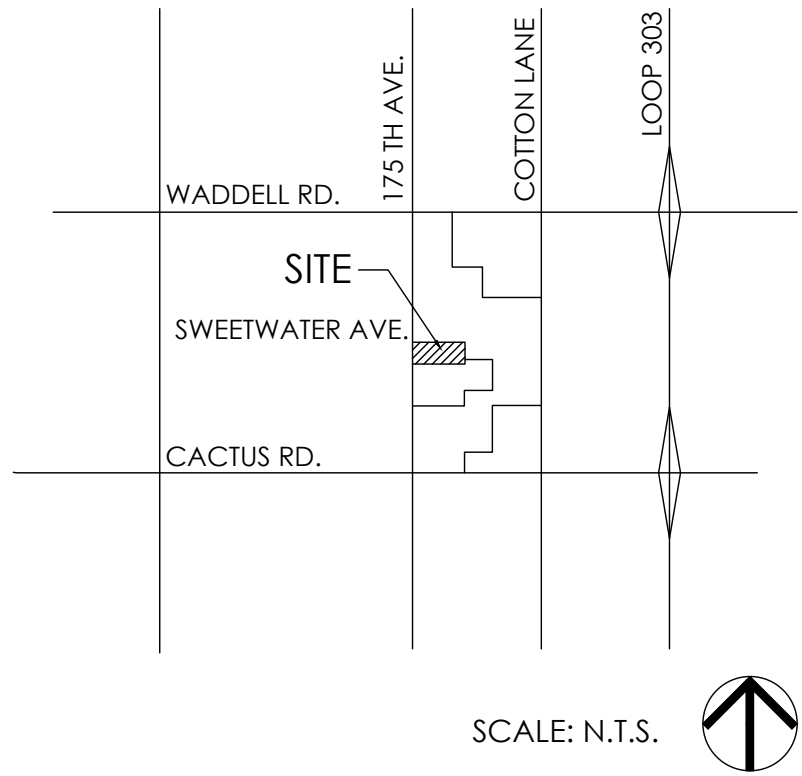
PROJECT DATA

CURRENT ZONING: *RU-43
GROSS AREA: 10.0 AC.
NET AREA: 9.1 AC.
OPEN SPACE AREA: 2.4 AC.

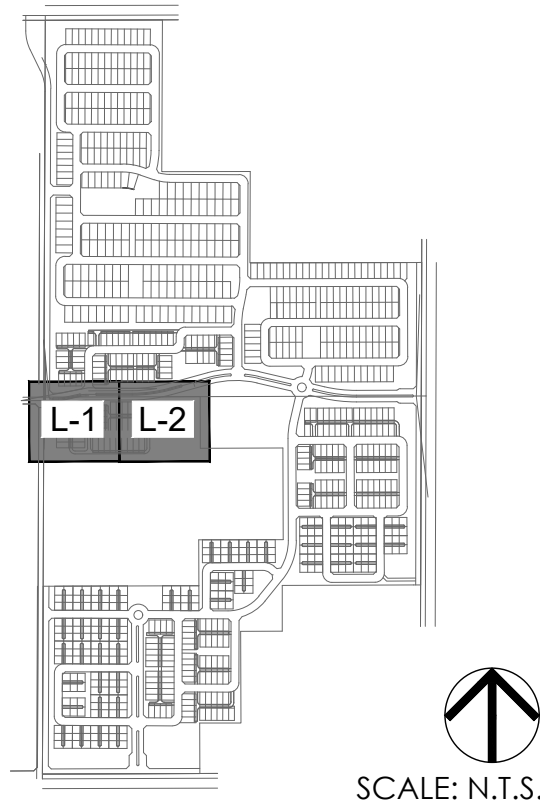
FOR TRACT TABLE SEE PRELIMINARY PLAT, SHEET 4, BY DAVID EVANS AND ASSOCIATES.

*RM-9 PUD ZONING UPON SUCCESSFUL ANNEXATION
PER FS16-437 AND SUBSEQUENT ZONING APPROVAL
PER FS16-391

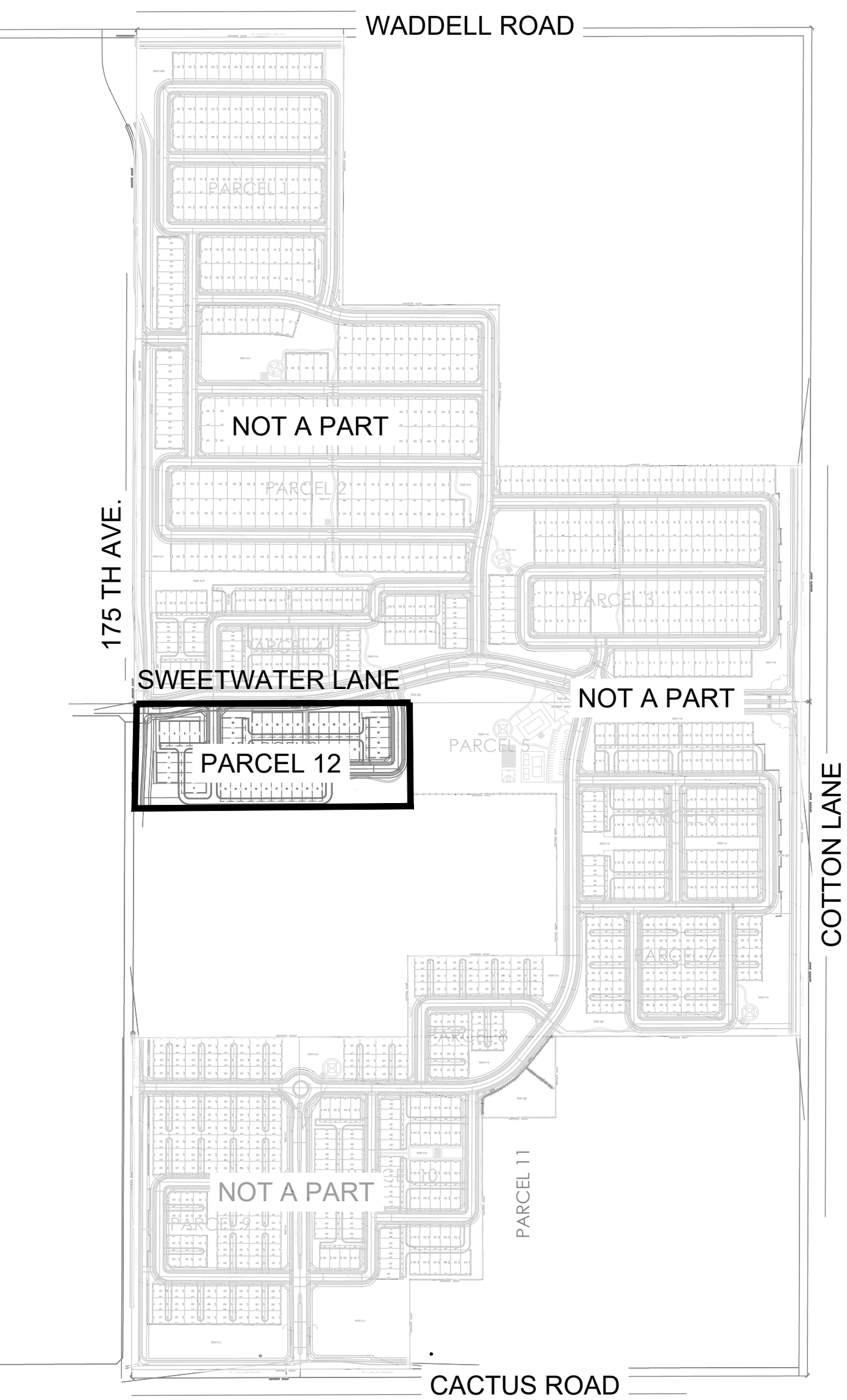
VICINITY MAP



KEYMAP



OVERALL PARCEL PLAN



PRELIMINARY PLANT PALETTE

Trees: <i>Acacia aneura</i> Mulga <i>Bauhinia mexicana</i> * Orchid Tree <i>Bauhinia lunarioides</i> * Anacaco Orchid Tree <i>Brachychiton populneus</i> * Bottle Tree <i>Caesalpinia cacalaco</i> Casalote 'Smoothie' <i>Chitalpa tashkentensis</i> 'Pink Dawn' * Chiltalpa <i>Citrus calamondin</i> Mandarin Orange <i>Cupressus sempervirens</i> Italian Cypress <i>Dalbergia sissoo</i> * Indian Rosewood <i>Eucalyptus microtheca</i> * Colibah Tree <i>Ficus microcarpa</i> Indian Laurel Fig	<i>Fraxinus uhdei</i> Shamel Ash <i>Fraxinus velutina</i> Arizona Ash <i>Fraxinus velutina</i> 'Fan Tex' Fan Tex Ash <i>Jacrandra mimosifolia</i> Jacaranda <i>Ligustrum lucidum</i> Glossy Privet <i>Magnolia grandiflora</i> <i>Olea europaea</i> 'Swan Hill' Swan Hill Olive <i>Pistacia chinensis</i> 'Red Push' ** Red Push Pistache <i>Quercus virginiana</i> 'Heritage' ** Heritage Live Oak <i>Schinus teribinthifolius</i> Brazilian Pepper Tree <i>Sophora secundiflora</i> ** Texas Mountain Laurel	<i>Thevetia peruviana</i> * Yellow Oleander <i>Tipuana tipu</i> * Tipu Tree <i>Ulmus parvifolia</i> .cv 'Sempervirens' * Chinese Evergreen Elm <i>Vitex agnus-castus</i> 'Montrose Purple' Chaste Tree
Shrubs: <i>Buxus japonica</i> 'Green Beauty' Japanese Boxwood <i>Callistemon citrinus</i> 'Little John' * Little John Bottlebrush <i>Carissa micorcarpa</i> 'Boxwood Beauty' Boxwood Beauty Natal Plum <i>Chrysactinia mexicana</i> Damianita * <i>Dietes bicolor</i> Fortnight Lily <i>Eremophila maculata</i> 'Valentine' * Emu Bush <i>Feijoa sellowiana</i> Pinnacle Guava <i>Gardenia jasminoides</i> Gardenia <i>Hibiscus rosa-sinensis</i> Chinese Hibiscus	<i>Ilex vomitoria</i> 'Stokes' Dwaft Yaupon <i>Ligustrum japonicum</i> Japanese Privet <i>Muhlenbergia rigens</i> * Deer Grass <i>Myrtus communis</i> 'Compacta' * Dwarf Myrtle <i>Nandina domestica</i> Compacta * <i>Osmanthus fragrans</i> Sweet Olive <i>Photinia fraseri</i> Red Photinia <i>Plumbago auriculata</i> * Cape Plumbago <i>Pyracantha koidzumii</i> 'Santa Cruz' * Santa Cruz Prostrata <i>Raphiolepis indica</i> 'Ballerina' Ballerina	<i>Simmondsia chinensis</i> Jojoba <i>Tecoma stans</i> 'Orange Jubilee' Arizona Yellow Bells <i>Vauquelinia californica</i> * Arizona Rosewood
Accents: <i>Cycas revoluta</i> * Sago Palm <i>Guara lindheimeri</i> Lindheimer's beeblossom	<i>Hesperaloe parviflora</i> * Red yucca <i>Yucca bacata</i> * Banana Yucca	<i>Yucca gloriosa</i> * Spanish Dagger <i>Yucca recurvifolia</i> * Pendulous Yucca
Ground Covers: <i>Carissa grandiflora</i> Green Carpet' Natal Plum <i>Convolvulus tricolor</i> Dwarf Morning Glory <i>Gazania rigens</i> 'Sun Gold' * Sun Gold * <i>Hedera helix</i> English Ivy <i>Lantana camera</i> 'New Gold' * New Gold Lantana <i>Lantana montevidensis</i> * Purple Trailing Lantana	<i>Lantana montevidensis</i> 'White' * Trailing White Lantana <i>Liriope muscari</i> Lilyturf <i>Pentas lanceolata</i> Egyptian Star <i>Rosmarinus officinalis</i> 'Prostratus' * Prostrate Rosemary <i>Trachelospermum asiaticum</i> Dwarf Star Jasmine <i>Verbena species</i>	<i>Vinca major</i> Vinca Major <i>Zephyranthes sp</i> Rain Lily
Vines <i>Bougainvillea brasiliensis</i> 'La Jolla' * La Jolla Bougainvillea <i>Gelsemium sempervirens</i> Carolina Jasmine	<i>Grewia occidentalis/caffa</i> Lavender Star Flower <i>Lonicera japonica</i> 'Halliana' Hall's Honeysuckle	<i>Rosa banksiae</i> * Lady Bank's Rose

- Notes:**
- * Plants on the ADWR Low Water Use Drought Tolerant plant list.
 - ** Plant species that are approved for use in public right-of-way per EDS 8.1.4.
 - Plants with an invasive root system will not be planted near sidewalks, pavements, wall, etc. and are indicated by **bold type and underline**.
 - Trees with erect growth habit within the right-of-way or adjacent to any sidewalk shall have their main vertical leader intact and shall remained unclipped.

SHEET INDEX

SHEET	PAGE #	TITLE
C-1	1	COVER SHEET
L-1	2	LANDSCAPE PLAN
L-2	3	LANDSCAPE PLAN
W-1	4	WALL & MAILBOX PLAN
WD-1	5	WALL DETAILS

PROJECT TEAM

Discipline	Company Contact Info.
Client	Surprise Village Partners, LLC Joseph J. Kalish 11024 N 28th Drive, Suite 170 Phoenix, AZ 85029 (602) 499-0899 joseph@jjkalish.com
Landscape Architect	LVA Urban Design Studio Laura Thelen, RLA 120 South Ash Avenue Tempe, Arizona 85281 (480) 994-0994 lthelen@lvadesign.com
Civil Engineer	David Evans and Associates Inc. Ramzi Georges, PE, CFPM 4600 E. Washington St., Suite 250 Phoenix, Arizona 85034 (602) 474-9223 ryg@deainc.com

AMENITIES LIST (BY PARCEL)

- Parcel 12:
- (1) Turf Retention basin / paved trails

LVA urban design studio
land planning • development entitlements • landscape architecture
120 south ash avenue • tempe, arizona 85281 • 480.994.0994
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175TH & SWEETWATER
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
AZ COMMUNITY DEVELOPMENT, LLC.

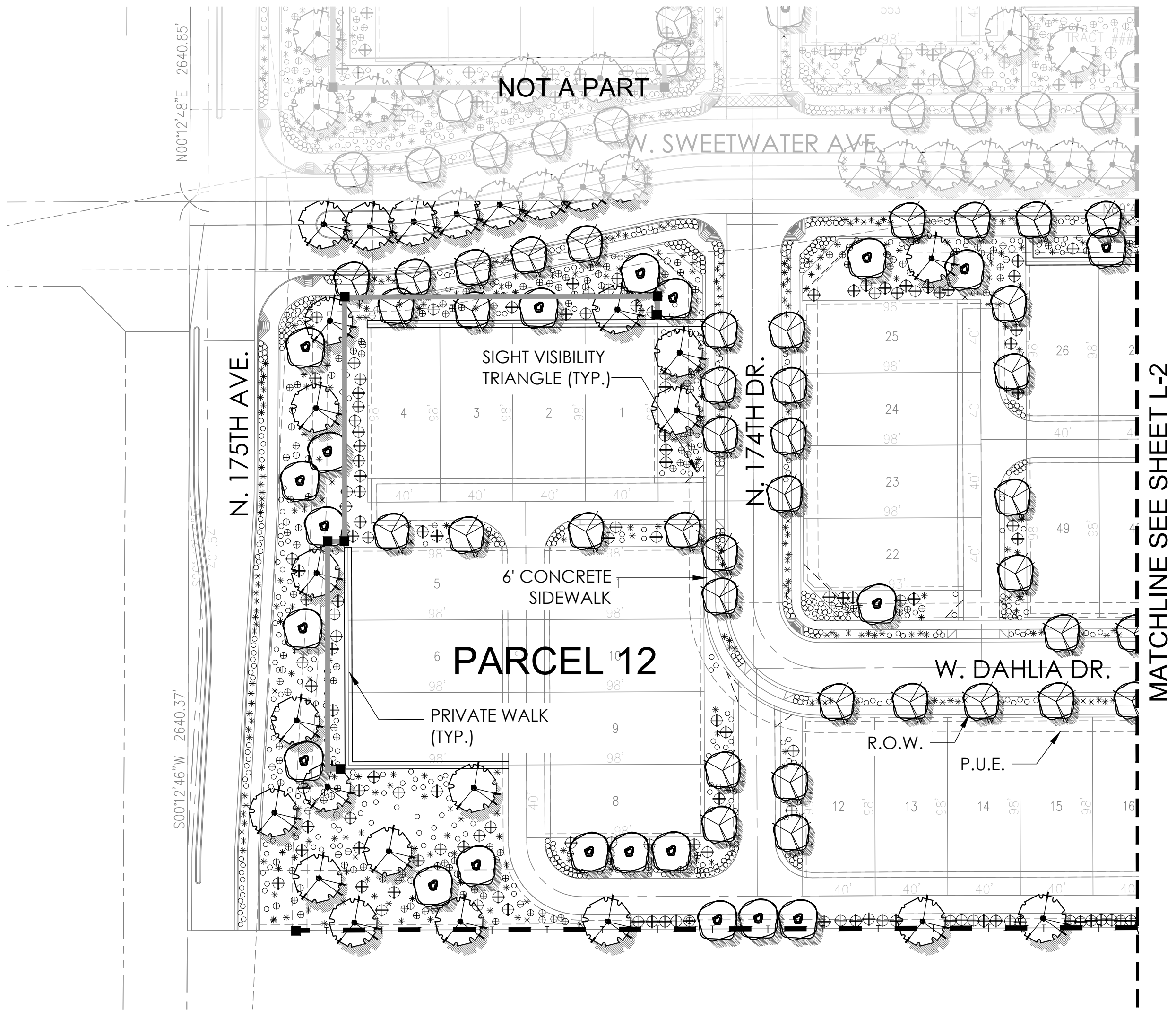
COVER SHEET

revision	date
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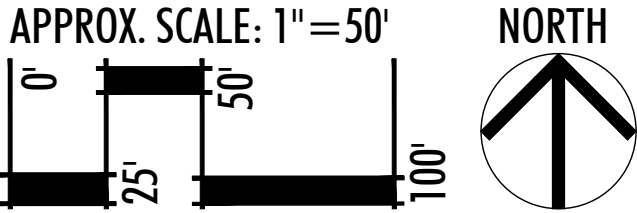
date: 11/04/16
job no.: 1640
drawn: LVA
sheet #

C-1
1 of 5



LEGEND

- THEME WALL (DETAIL 1, SHT WD-1)
- PONY WALL (DETAIL 2, SHT WD-1)
- MAILBOX CLUSTER (DETAIL 3, SHT WD-1)



KEYMAP



PRELIMINARY PLANT PALETTE

- Trees:**

 - Acacia aneura
 - Mulga
 - Bauhinia mexicana *
 - Orchid Tree
 - Bauhinia lunaroides *
 - Anacaco Orchid Tree
 - Brachychiton populneus *
 - Bottle Tree
 - Caesalpinia cocalaco
 - Cascalote 'Smoothie'
 - Chitalpa tashkentensis 'Pink Dawn' *
 - Chitalpa
 - Citrus calamondin
 - Mandarin Orange
 - Cupresses sempervirens
 - Italian Cypress *
 - Dalbergia sissoo
 - Indian Rosewood
 - Eucalyptus microtheca *
 - Colibah Tree
 - Ficus microcarpa
 - Indian Laurel Fig
- Shrubs:**

 - Buxus japonica 'Green Beauty'
 - Japanese Boxwood
 - Callistemon citrinus 'Little John' *
 - Little John Bottlebrush
 - Carissa micorcarpa
 - 'Boxwood Beauty' Natal Plum
 - Chrysactinia mexicana
 - Damianita *
 - Diets bicolor
 - Fortnight Lily
 - Eremophila maculata
 - 'Valentine' *
 - Emu Bush
 - Feijoa sellowiana
 - Pinnacle Guava
 - Gardenia jasminoides
 - Gardenia
 - Hibiscus rosa-sinensis
 - Chinese Hibiscus
- Accents:**

 - Cycas revoluta *
 - Sago Palm
 - Guara lindheimeri
 - Lindheimer's beeblossom
- Ground Covers:**

 - Carissa grandiflora
 - Green Carpet' Natal Plum
 - Convolvulus tricolor
 - Dwarf Morning Glory
 - Gazania rigens 'Sun Gold' *
 - Sun Gold *
 - Hedera helix
 - English Ivy
 - Lantana camera 'New Gold' *
 - New Gold Lantana
 - Lantana montevidensis *
 - Purple Trailing Lantana
- Vines**

 - Bougainvillea brasiliensis
 - 'La Jolla' *
 - La Jolla Bougainvillea
 - Gelsemium sempervirens
 - Carolina Jasmine
- Fraxinus uhdei**

 - Shamel Ash
 - Fraxinus velutina**
 - Arizona Ash
 - Fraxinus velutina 'Fan Tex'**
 - Fan Tex Ash
 - Jacaranda mimosifolia
 - Jacaranda
 - Ligustrum lucidum
 - Glossy Privet
 - Magnolia grandiflora
 - Olea europaea 'Swan Hill'**
 - Swan Hill Olive
 - Pistacia chinensis 'Red Push' ****
 - Red Push Pistache
 - Quercus virginiana
 - 'Heritage' **
 - Heritage Live Oak
 - Schinus terbinthifolius**
 - Brazilian Pepper Tree
 - Sophora secundiflora **
 - Texas Mountain Laurel
- Thevetia peruviana ***

 - Yellow Oleander
 - Tipuana tipu ***
 - Tipu Tree
 - Ulmus parvifolia cv
 - 'Sempervirens' *
 - Chinese Evergreen Elm
 - Vitex agnus-castus 'Montrose Purple'
 - Chaste Tree
- Ilex vomitoria 'Stokes'**

 - Dwarf Yaupon
 - Ligustrum japonicum
 - Japanese Privet
 - Muhlenbergia rigens *
 - Deer Grass
 - Myrtus communis
 - 'Compacta' *
 - Dwarf Myrtle
 - Nandina domestica
 - Compacta *
 - Osmanthus fragrans
 - Sweet Olive
 - Photinia fraseri
 - Red Photinia
 - Plumbago auriculata *
 - Cape Plumbago
 - Pyracantha koidzumii
 - 'Santa Cruz' *
 - Santa Cruz Prostrata
 - Raphiolepis indica
 - 'Ballerina'
 - Ballerina
- Simmondsia chinensis**

 - Jojoba
 - Tecoma stans 'Orange Jubilee'
 - Arizona Yellow Bells
 - Vauquelinia californica *
 - Arizona Rosewood
- Hesperaloe parviflora ***

 - Red yucca
 - Yucca bacata *
 - Banana Yucca
- Yucca gloriosa ***

 - Spanish Dagger
 - Yucca recurvifolia *
 - Pendulous Yucca
- Lantana montevidensis**

 - 'White' *
 - Trailing White Lantana
 - Liriope muscari
 - Lilyturf
 - Pentas lanceolata
 - Egyptian Star
 - Rosmarinus officinalis
 - 'Prostratus' *
 - Prostrate Rosemary
 - Trachelospermum asiaticum
 - Dwarf Star Jasmine
 - Verbena species
- Vinca major**

 - Vinca Major
 - Zephyranthes sp
 - Rain Lily
- Grevia occidentalis/caffra**

 - Lavender Star Flower
 - Lonicera japonica
 - 'Halliana'
 - Hall's Honeysuckle
- Rosa banksiae ***

 - Lady Bank's Rose

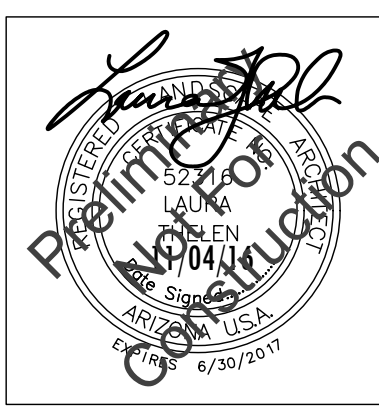
- Notes:
- * Plants on the ADWR Low Water Use Drought Tolerant plant list.
 - ** Plant species that are approved for use in public right-of-way per EDS 8.1.4.
 - Plants with an invasive root system will not be planted near sidewalks, pavements, wall, etc. and are indicated by **bold type and underline**.
 - Trees with erect growth habit within the right-of-way or adjacent to any sidewalk shall have their main vertical leader intact and shall remained unclipped.

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175TH & SWEETWATER

PRELIMINARY LANDSCAPE PLAN

SURPRISE, ARIZONA

AZ COMMUNITY DEVELOPMENT, LLC.

LANDSCAPE PLAN

revision date

▲

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Call Two Working Days Before You Dig

602-263-1100

1-800-STAKE-IT

(Outside Maricopa County)

date: 11/04/16

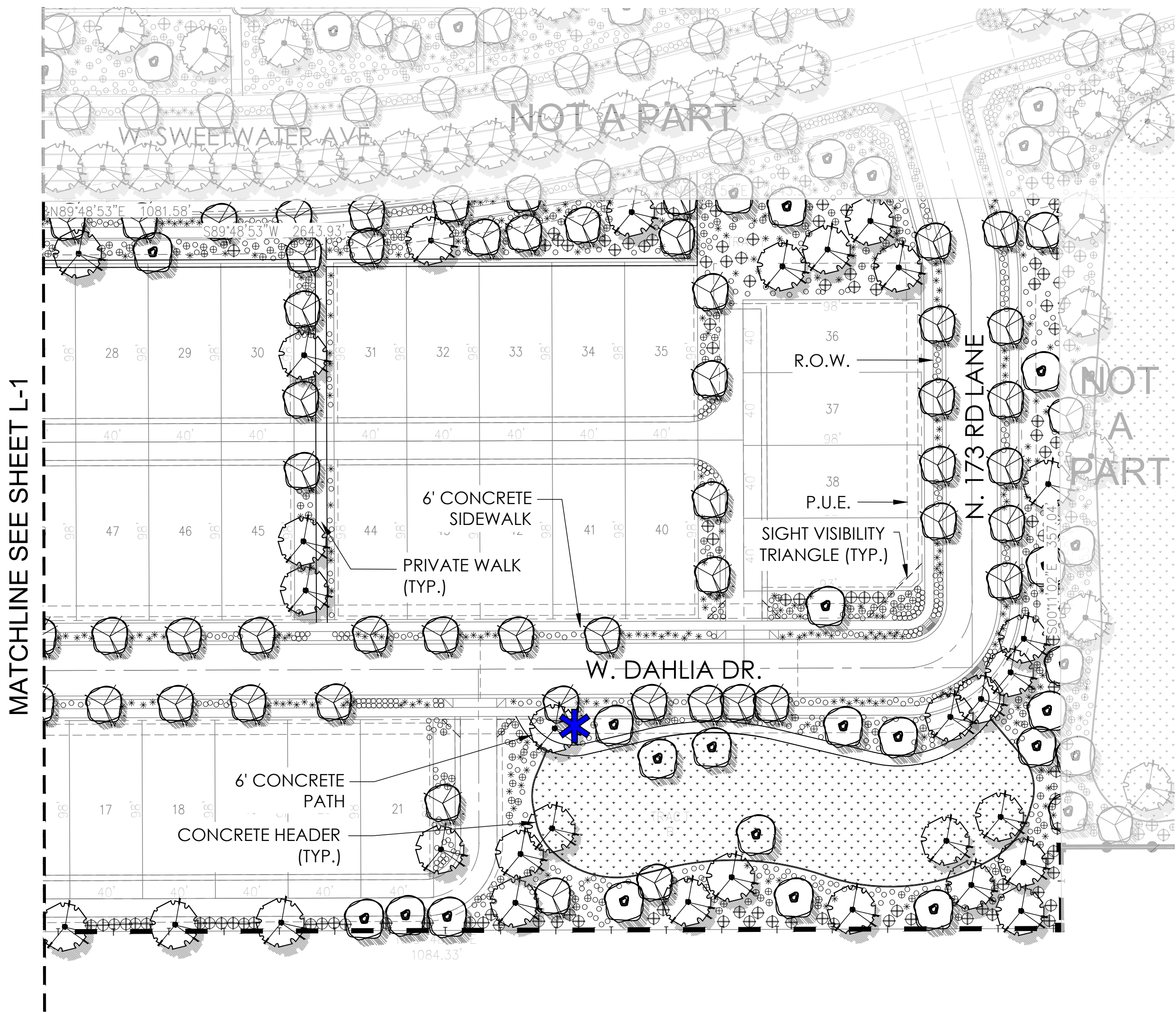
job no.: 1640

drawn: LVA

sheet #

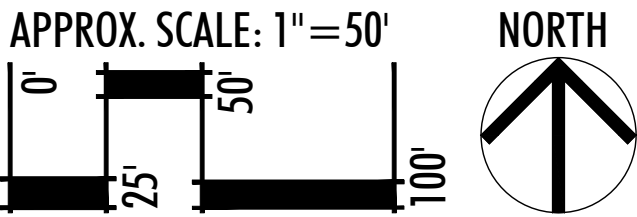
L-1

2 of 5



LEGEND

- THEME WALL (DETAIL 1, SHT WD-1) — T — T —
- PONY WALL (DETAIL 2, SHT WD-1) — — —
- MAILBOX CLUSTER (DETAIL 3, SHT WD-1) *



KEYMAP

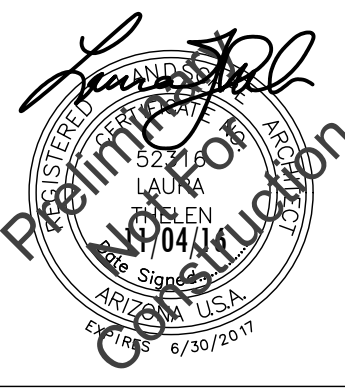


PRELIMINARY PLANT PALETTE

Trees: <i>Acacia aneura</i> Mulga <i>Bauhinia mexicana</i> * Orchid Tree <i>Bauhinia lunaroides</i> * Anacaco Orchid Tree <i>Brachychiton populneus</i> * Bottle Tree <i>Caesalpinia cocalaco</i> Cascadote 'Smoothie' <i>Chitalpa tashkentensis</i> 'Pink Dawn' * Chitalpa <i>Citrus calamondin</i> Mandarin Orange <i>Cupressus sempervirens</i> Italian Cypress <i>Dalbergia sissoo</i> Indian Rosewood <u><i>Eucalyptus microtheca</i></u> * Colibah Tree <i>Ficus microcarpa</i> Indian Laurel Fig	<i>Fraxinus uhdei</i> Shamel Ash <u><i>Fraxinus velutina</i></u> Arizona Ash <u><i>Fraxinus velutina</i></u> 'Fan Tex' Fan Tex Ash <i>Jacaranda mimosifolia</i> Jacaranda <i>Ligustrum lucidum</i> Glossy Privet <i>Magnolia grandiflora</i> <u><i>Olea europaea</i></u> 'Swan Hill' Swan Hill Olive <u><i>Pistacia chinensis</i></u> 'Red Push' ** Red Push Pistache <i>Quercus virginiana</i> 'Heritage' ** Heritage Live Oak <i>Schinus terbinthifolius</i> Brazilian Pepper Tree <i>Sophora secundiflora</i> ** Texas Mountain Laurel	<i>Thevetia peruviana</i> * Yellow Oleander <u><i>Tipuana tipu</i></u> * Tipu Tree <i>Ulmus parvifolia</i> cv 'Sempervirens' * Chinese Evergreen Elm <i>Vitex agnus-castus</i> 'Montrose Purple' Chaste Tree
Shrubs: <i>Buxus japonica</i> 'Green Beauty' Japanese Boxwood <i>Callistemon citrinus</i> 'Little John' * Little John Bottlebrush <i>Carissa microcarpa</i> 'Boxwood Beauty' Boxwood Beauty Natal Plum <i>Chrysactinia mexicana</i> Damianita * <i>Diets bicolor</i> Fortnight Lily <i>Eremophila maculata</i> 'Valentine' * Emu Bush <i>Feijoa sellowiana</i> Pinnacle Guava <i>Gardenia jasminoides</i> Gardenia <i>Hibiscus rosa-sinensis</i> Chinese Hibiscus	<i>Ilex vomitoria</i> 'Stokes' Dwarf Yaupon <i>Ligustrum japonicum</i> Japanese Privet <i>Muhlenbergia rigens</i> * Deer Grass <i>Myrtus communis</i> 'Compacta' * Dwarf Myrtle <i>Nandina domestica</i> Compacta * <i>Osmanthus fragrans</i> Sweet Olive <i>Photinia fraseri</i> Red Photinia <i>Plumbago auriculata</i> * Cape Plumbago <i>Pyracantha koidzumii</i> 'Santa Cruz' * Santa Cruz Prostrata <i>Raphiolepis indica</i> 'Ballerina' Ballerina	<i>Simmondsia chinensis</i> Jojoba <i>Tecoma stans</i> 'Orange Jubilee' Arizona Yellow Bells <i>Vauquelinia californica</i> * Arizona Rosewood
Accents: <i>Cycas revoluta</i> * Sago Palm <i>Guara lindheimeri</i> Lindheimer's beeblossom	<i>Hesperaloe parviflora</i> * Red yucca <i>Yucca bacata</i> * Banana Yucca	<i>Yucca gloriosa</i> * Spanish Dagger <i>Yucca recurvifolia</i> * Pendulous Yucca
Ground Covers: <i>Carissa grandiflora</i> Green Carpet' Natal Plum <i>Convolvulus tricolor</i> Dwarf Morning Glory <i>Gazania rigens</i> 'Sun Gold' * Sun Gold * <i>Hedera helix</i> English Ivy <i>Lantana camera</i> 'New Gold' * New Gold Lantana <i>Lantana montevidensis</i> * Purple Trailing Lantana	<i>Lantana montevidensis</i> 'White' * Trailing White Lantana <i>Liriope muscari</i> Lilyturf <i>Pentas lanceolata</i> Egyptian Star <i>Rosmarinus officinalis</i> 'Prostratus' * Prostrate Rosemary <i>Trachelospermum asiaticum</i> Dwarf Star Jasmine <i>Verbena species</i>	<i>Vinca major</i> Vinca Major <i>Zephyranthes sp</i> Rain Lily
Vines <i>Bougainvillea brasiliensis</i> 'La Jolla' * La Jolla Bougainvillea <i>Gelsemium sempervirens</i> Carolina Jasmine	<i>Grevia occidentalis/caffra</i> Lavender Star Flower <i>Lonicera japonica</i> 'Halliana' Hall's Honeysuckle	<i>Rosa banksiae</i> * Lady Bank's Rose

- Notes:
- * Plants on the ADWR Low Water Use Drought Tolerant plant list.
 - ** Plant species that are approved for use in public right-of-way per EDS 8.1.4.
 - Plants with an invasive root system will not be planted near sidewalks, pavements, wall, etc. and are indicated by **bold type and underline**.
 - Trees with erect growth habit within the right-of-way or adjacent to any sidewalk shall have their main vertical leader intact and shall remained unclipped.

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175TH & SWEETWATER
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
AZ COMMUNITY DEVELOPMENT, LLC.

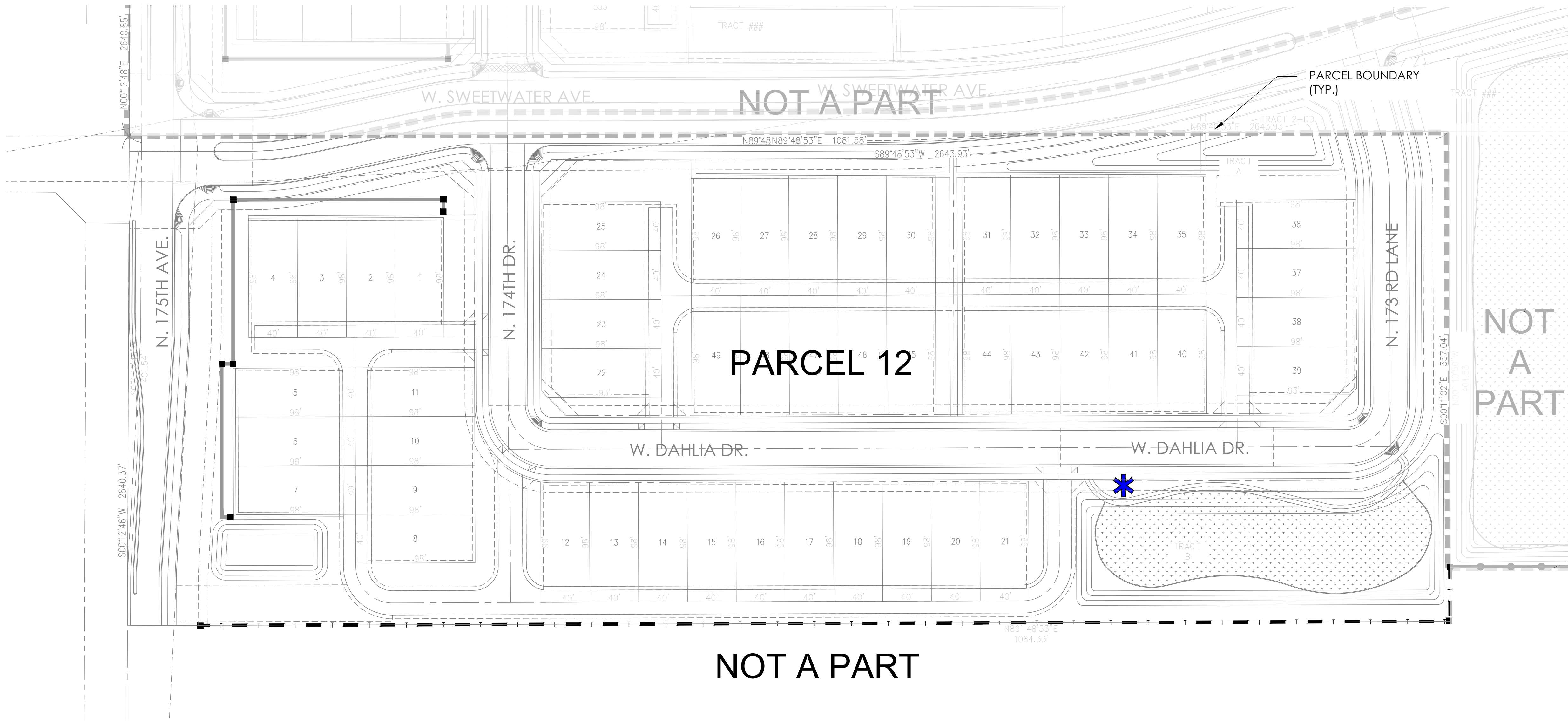
LANDSCAPE
PLAN

revision	date
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Call Two Working Days Before You Dig
602-263-1100
1-800-STAKE-IT
(Outside Maricopa County)

date: 11/04/16
job no.: 1640
drawn: LVA
sheet #

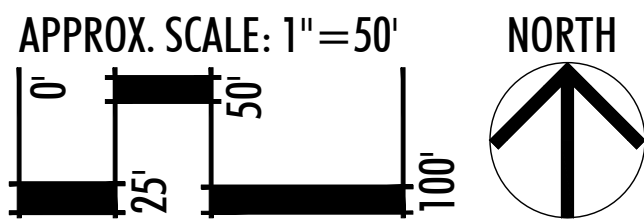
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3 of 5



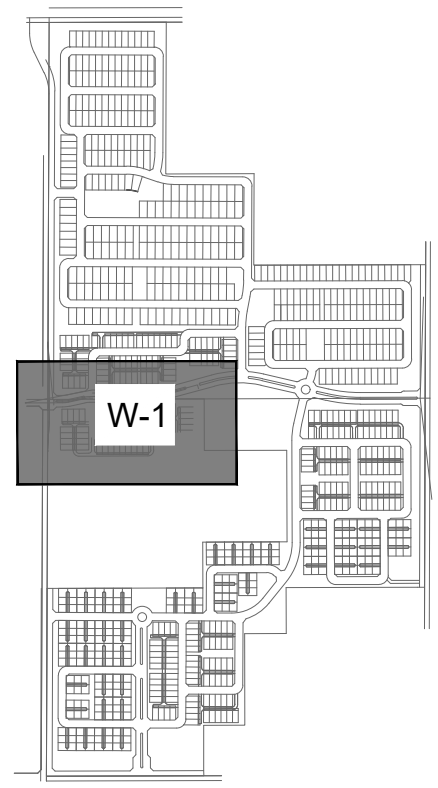
- NOTE:**
1. ALL MAILBOX LOCATIONS AND SIZES ARE PRELIMINARY AND ARE SUBJECT TO FINAL APPROVAL BY THE U.S.P.S.
 2. ADEQUATE LIGHTING FIXTURES WILL BE PROVIDED IN MAILBOX LOCATIONS. DETAILS TO BE PROVIDED WITH FINAL PLANS.

LEGEND

- THEME WALL (DETAIL 1, SHT WD-1)
- PONY WALL (DETAIL 2, SHT WD-1)
- MAILBOX CLUSTER (DETAIL 3, SHT WD-1)



KEYMAP



175TH & SWEETWATER
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
AZ COMMUNITY DEVELOPMENT, LLC.

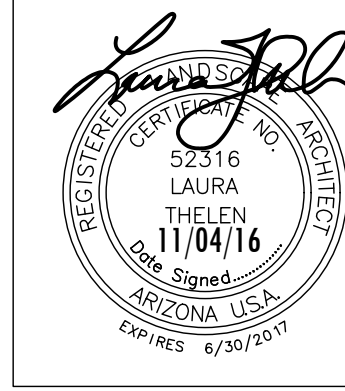
**WALL &
MAILBOX
PLAN**

revision	date

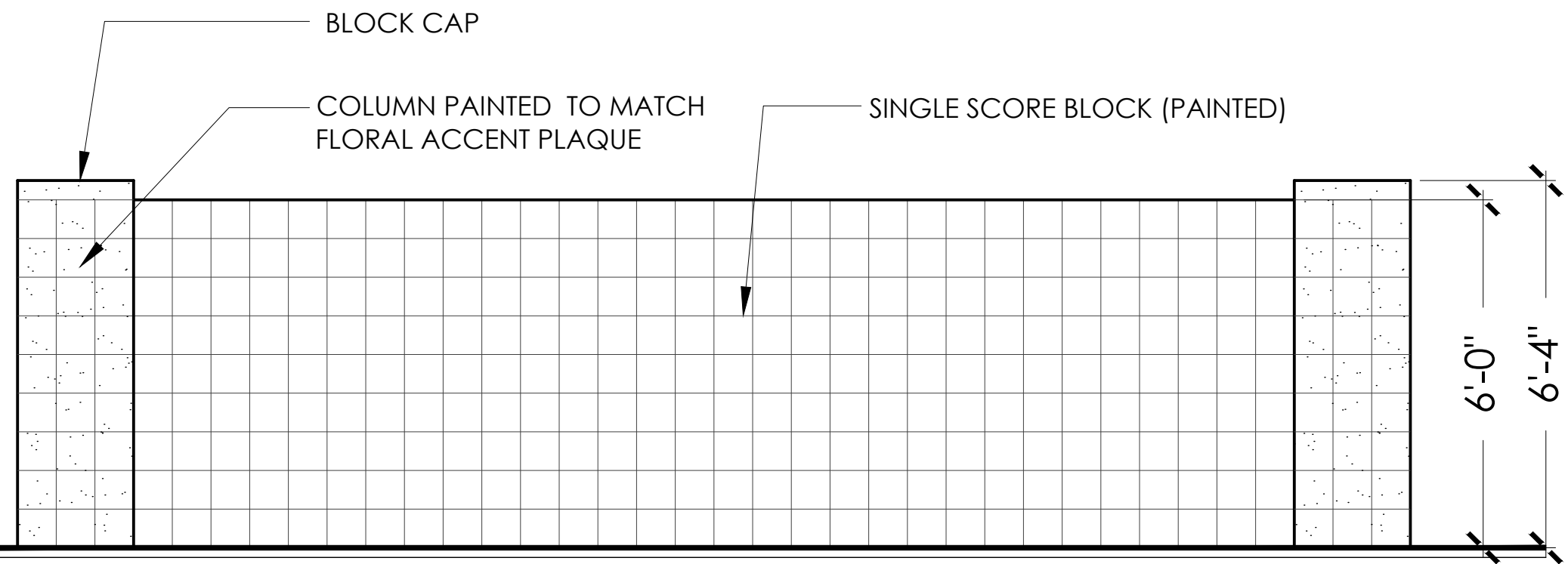


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drawn: LVA
sheet #

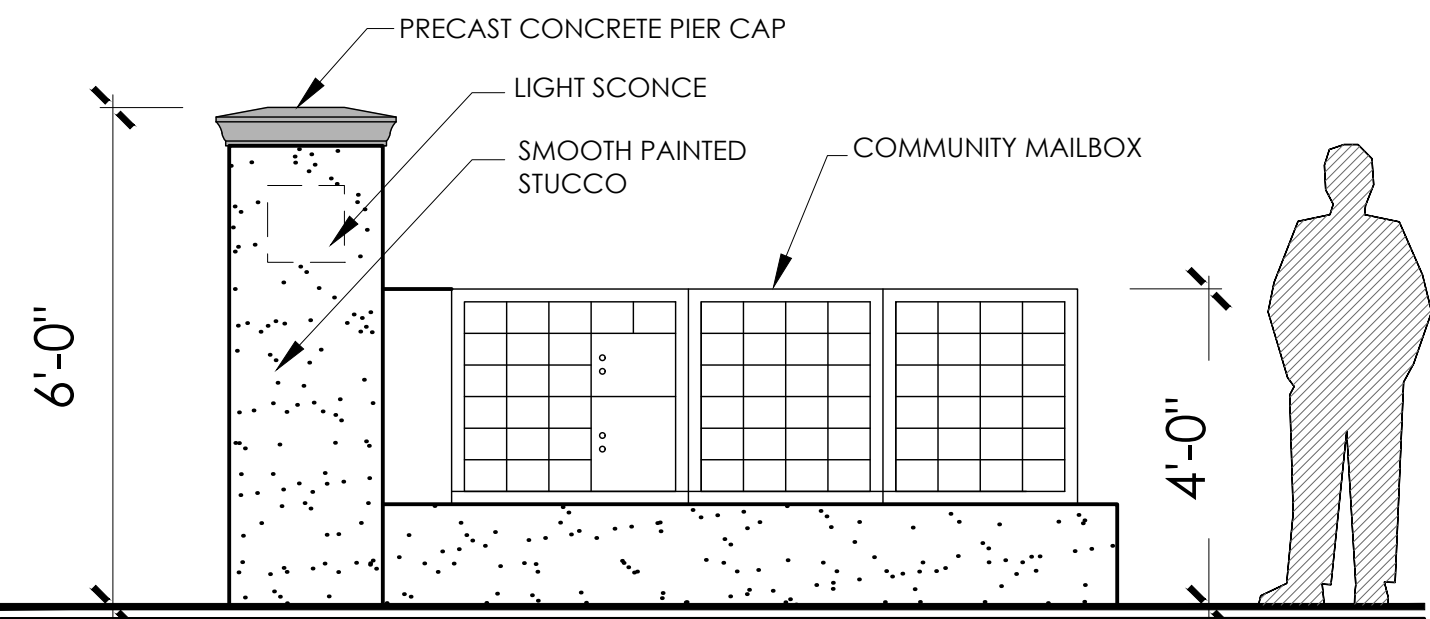
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4 of 5



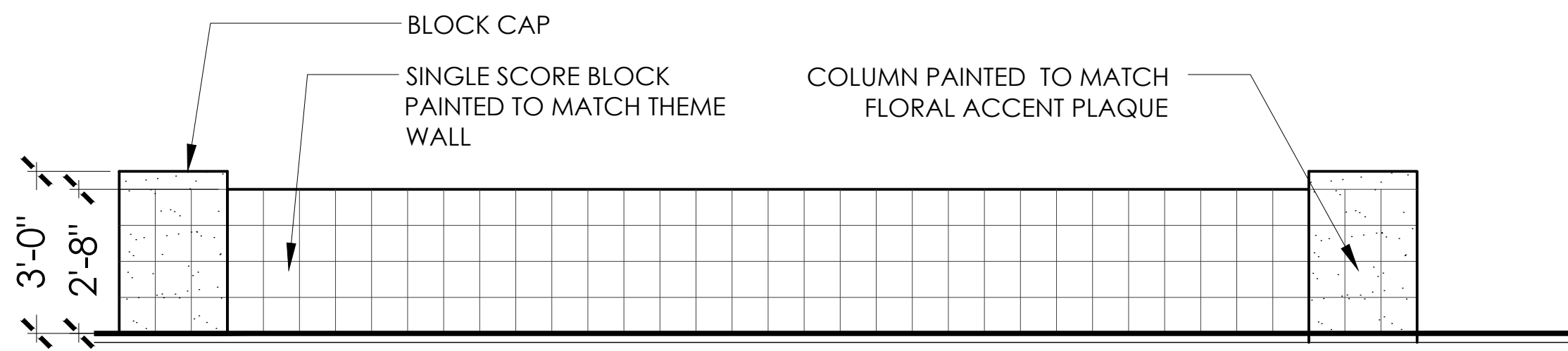
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1 THEME WALL
SCALE: 1" = 30'



3 MAILBOX CLUSTER
SCALE: 1" = 30'



2 PONY WALL
SCALE: 1" = 30'

revision	date
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date: 11/04/16
job no.: 1640
drawn: LVA
sheet #



**DEPARTMENT OF THE AIR FORCE
AIR EDUCATION AND TRAINING COMMAND**

3 October 2016

Mr. James R. Mitchell
Director, Community Initiatives Team
56th Fighter Wing
14185 West Falcon St.
Luke AFB AZ 85309-1629

Ms. Jamie Sullivan
Development Services Specialist
City of Surprise Planning Department
16000 N. Civic Center Plaza
Surprise AZ 85374

Re: FS16-391; 175th Ave & Sweetwater Avenue

Dear Ms. Sullivan

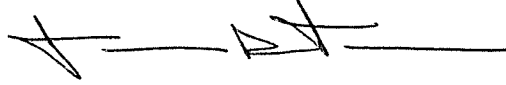
Thank you for the opportunity to provide comments on the Rezone and Preliminary Plat Application for 175th and Sweetwater Avenues. The site is on 10 net acres located at the southeast corner of 175th and Sweetwater Avenues within unincorporated Maricopa County however is within the City of Surprise General Planning Area. This request is a rezoning with a preliminary plat for a planned residential community consisting of 55 units, for an overall density of 5.5 dwelling units per acre. The subject property is currently vacant zoned Rural 43 (R-43), requested zoning for the property will be Residential Medium, Planned Unit Development (RM-9 PUD). The site is approximately 2.7 miles outside the 1988 JLUS 65 Ldn, "high noise or accident potential zone" as defined by A.R.S. § 28-8461 and is outside the "territory in the vicinity of a military airport" also defined by A.R.S. § 28-8461.

Luke AFB follows the guidelines in the Graduated Density Concept (GDC). The GDC proposes, in the absence of a more restrictive state, county or municipal general or comprehensive plan, graduating densities away from the 65 Ldn as follows: a maximum of 2 du/acre from the 65 Ldn to 1/2 mile, a maximum of 4 du/acre from 1/2 to 1 mile, and a maximum of 6 du/acre from 1 to 3 miles. The density of 5.5 du/ac meets these guidelines.

This request, as stated in the application, will not negatively impact the flying operations at Luke AFB. Since the site will be located inside the "territory in the vicinity of a military airport," it will be subjected to approximately 165 over flights a day, with some as low as 1,500 feet above ground level. We recommend you review the sound attenuation requirements found in A.R.S. § 28-8482. In addition, a strong notification program on the part of the applicant is essential to inform potential residents about Luke AFB operations.

If there are any questions, please contact my Community Planner, Ms. Barbara Plante, at (623) 856-9981.

Sincerely

A handwritten signature in black ink, appearing to read 'J. Mitchell', followed by a horizontal line.

JAMES R. MITCHELL

cc:

Colonel David G. Shoemaker, Vice Commander, 56th Fighter Wing

Ms. Cindy L. Calderon, GS-13, General and Environmental Law Attorney, 56th Fighter Wing

Jamie,

I have reviewed the proposed FS16-391 175th Ave & Sweetwater residential development. The development does not affect any ADOT highway facilities.

We appreciate the opportunity to review and comment.

PETE ENO

Right Of Way Coordinator

205 South 17th Avenue Mail Drop 612E

Phoenix, AZ 85007

602-712-7348

azdot.gov



Jamie,

Thank you for providing the Electronic Submittal for 175th Ave. & Sweetwater (FS16-391).

MWD has reviewed this submittal and determined that the proposed development project will impact MWD. As a result, this development will require a development agreement between MWD and the developer to address the impacts to MWD's facilities and/or property interests. Please have the developer or their consultant contact MWD to discuss this project. Additionally, the developer will need to provide copies of any subdivision plats and utility and improvement plans to MWD for review and approval pursuant to the attached *MWD Drawing Requirements*, along with payment of the applicable plan review fees pursuant to the attached *MWD Fees & Payment Schedule*. Upon our review of the plat and/or plans once they are provided by the developer, MWD will copy the City on our approval and/or comments.

Thanks again,

Debbie Trasancos

Property & Contracts Specialist

Maricopa Water District

14825 W. Grand Ave.

Surprise, AZ 85374

623/546-8266

fax 623/584-2536

debbiet@mwdaz.com



S U R P R I S E

ARIZONA

City Council

January 17, 2017



175th & Sweetwater



FS16-427

- ✓ Annexation

FS16-391 175th & Sweetwater

- ✓ Zone Change
- ✓ Preliminary Plat

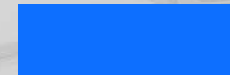
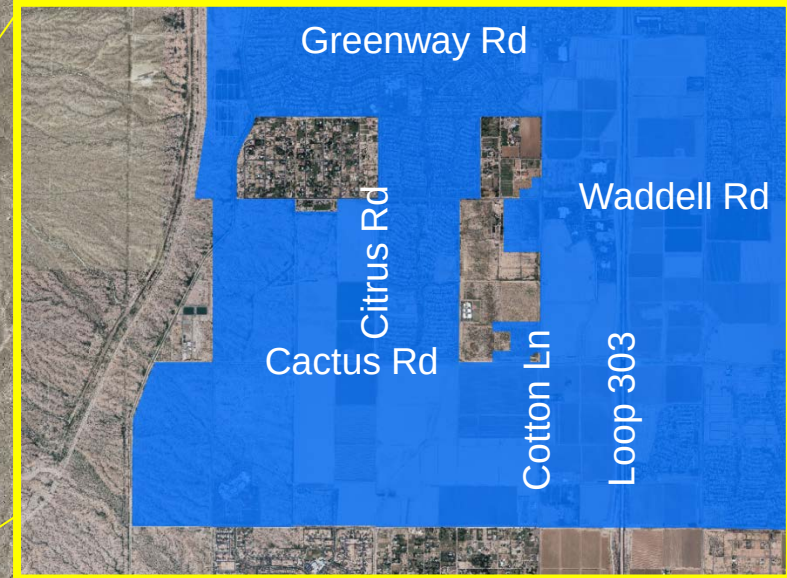
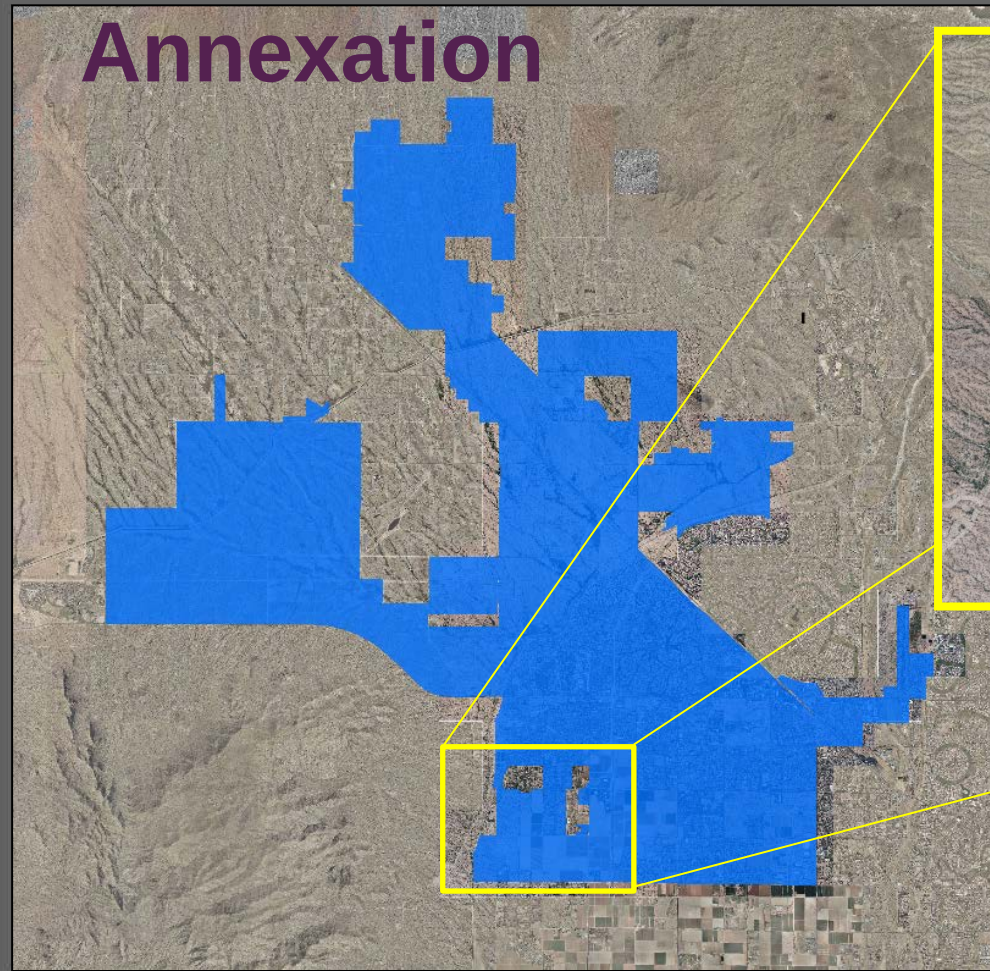
FS16-392 Magnolia

- ✓ Zone Change
- ✓ Preliminary Plat



175th & Sweetwater

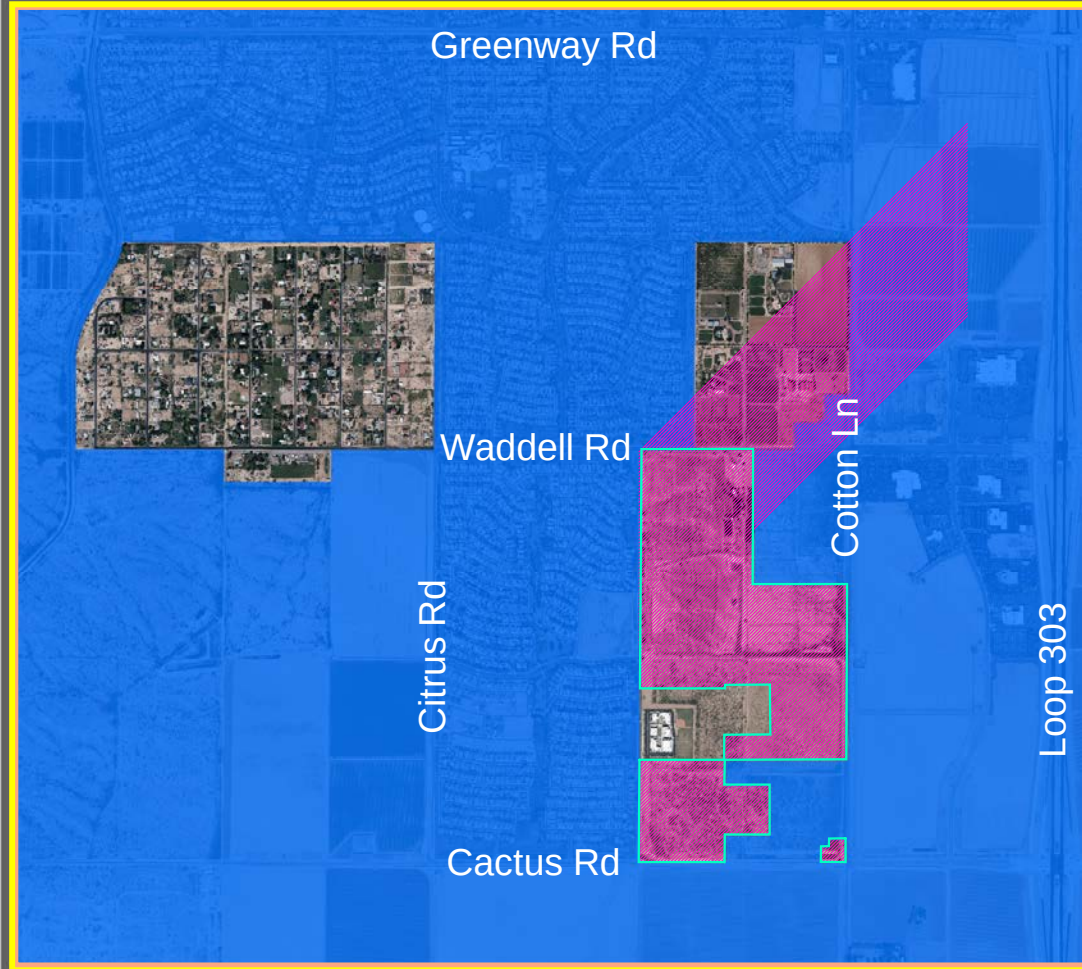
Annexation



Existing Surprise
Annexation

FS16-427

Annexation



FS16-427

Greenway Rd

Waddell Rd

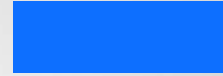
Citrus Rd

Cactus Rd

Cotton Ln

Loop 303

Annexation



Existing Surprise
Annexation



Existing County
RU-43 Zoning



Existing County
C3 Zoning

FS16-427

Greenway Rd

Waddell Rd

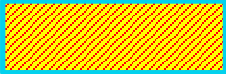
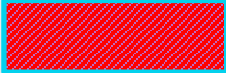
Citrus Rd

Cactus Rd

Cotton Ln

Loop 303

Annexation

-  Existing Surprise Annexation
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning
-  Post-Annexation Surprise CR Zoning

FS16-427

Financial Impact Analysis

➤ Operating Funds

- Negative impact
- Expenses greater than revenue by \$8,851,300 over 20 years
- \$442,600 annually

➤ Enterprise Funds

- Positive Impact
- \$1,387,200 over 20 years
- \$69,400 annually

FS16-427

Alternative Actions:

- **Approve** the Annexation
- **Deny** the Annexation



Zone Changes:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia

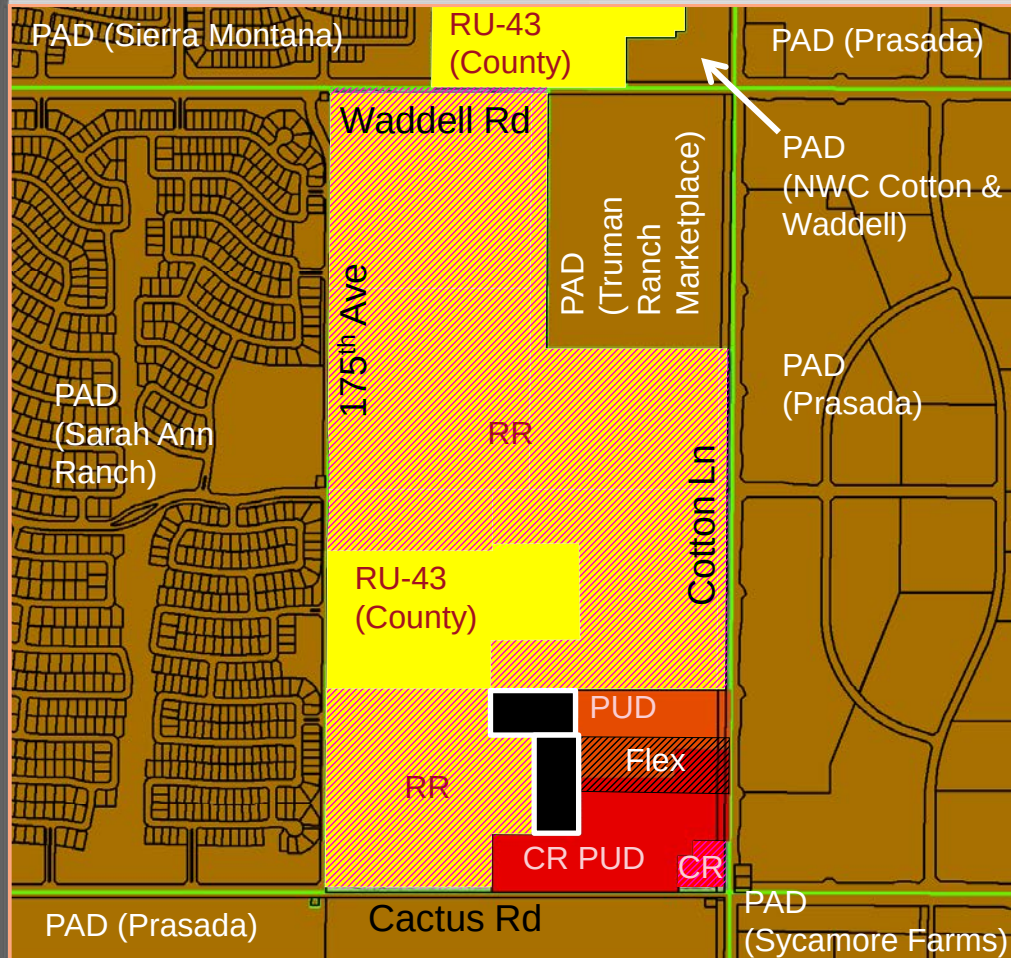


Zone Changes:

1st Zone Change Request:

➤ FS16-392 Magnolia

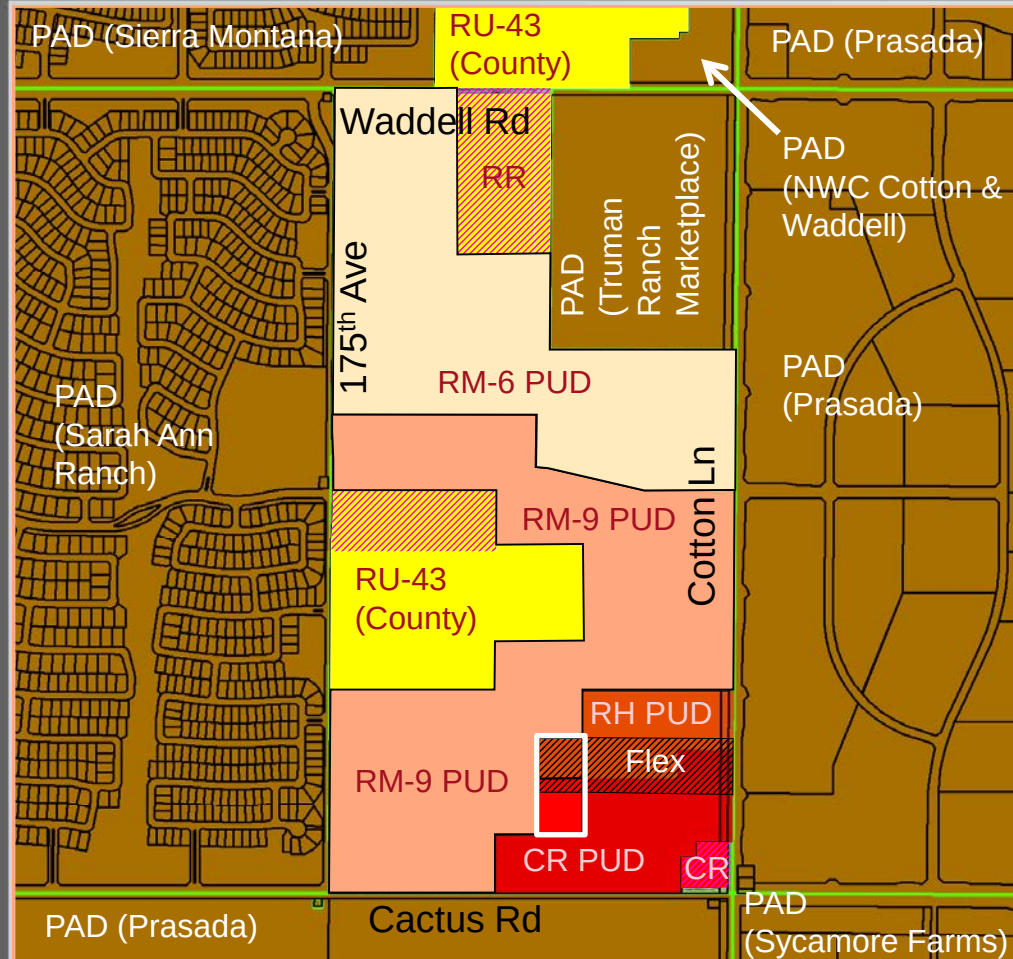




Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning*
- Post-Annexation Surprise CR Zoning*
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning

*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning



- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning

Zone Change



FS16-392

Table 1: RM-6 FUD and RM-9 FUD Development Standards

Development Standard	RM-6 City Base Standard	Proposed RM-6 FUD Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	375	N/A	525
Maximum Density	6.0	6.0	9.0	9.0
Minimum Lot Area (sf)	6,000	4,900	4,500	3,000
Minimum Lot Width (ft)	50	45	40	40
Minimum Lot Depth (ft)	100	100	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	12/20	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft) (4)	20	15/20	20	13
Maximum Building Height (ft) (5)	35	35	35	35

Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 12' setback for RM-6 and 8' setback for RM-9 (unless adjacent to a FUE, in which case the minimum front setback for RM-9 shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.
- (4) For RM-6 FUD, single-story minimum setback is 15', and two-story minimum setback is 20'.
- (5) For cluster product in the RM-9 FUD district, the rear two units within each cluster shall be single story, unless the builder chooses to fire sprinkler those homes, in which case two story units shall be permitted.





PRIMARY ENTRY MONUMENT



ENTRY FEATURE IN MEDIAN



PRIMARY ENTRY PLAN VIEW (COTTON LANE & SWEETWATER AVE)

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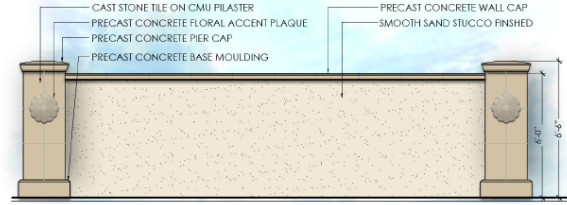
MAGNOLIA

FIGURE 6: COMMUNITY ENTRY MONUMENT

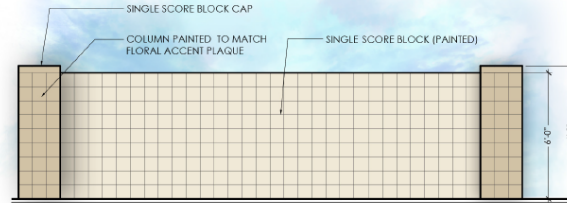
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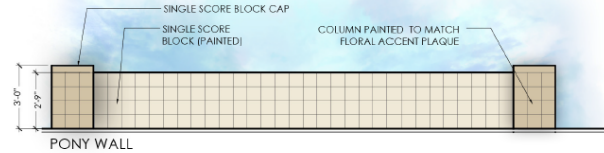
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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 6 COMMUNITY ENTRY MONUMENT.dwg Sep 7, 2016



ENHANCED THEME WALL



THEME WALL



PONY WALL

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MAGNOLIA

FIGURE 7: WALL DETAILS

APPROX. SCALES

1640

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11/16/16

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11/14/16 MAGNOLIA/PLANNING/1640-FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



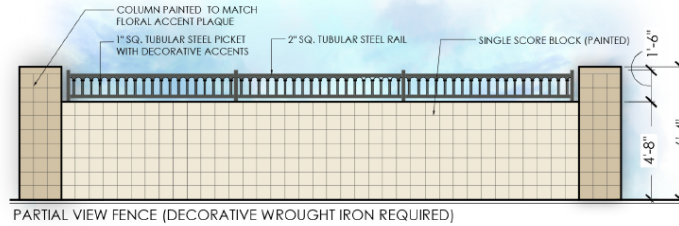
FS16-392

Monuments and Walls

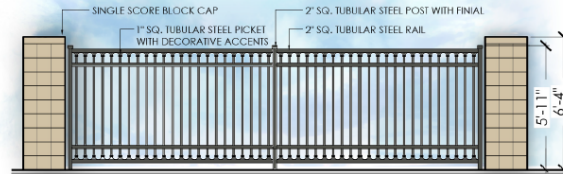


FS16-392

Monuments and Walls



PARTIAL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)



FULL VIEW FENCE (DECORATIVE WROUGHT IRON REQUIRED)

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MAGNOLIA

FIGURE 7A: WALL DETAILS

APPROX. SCALE(S)

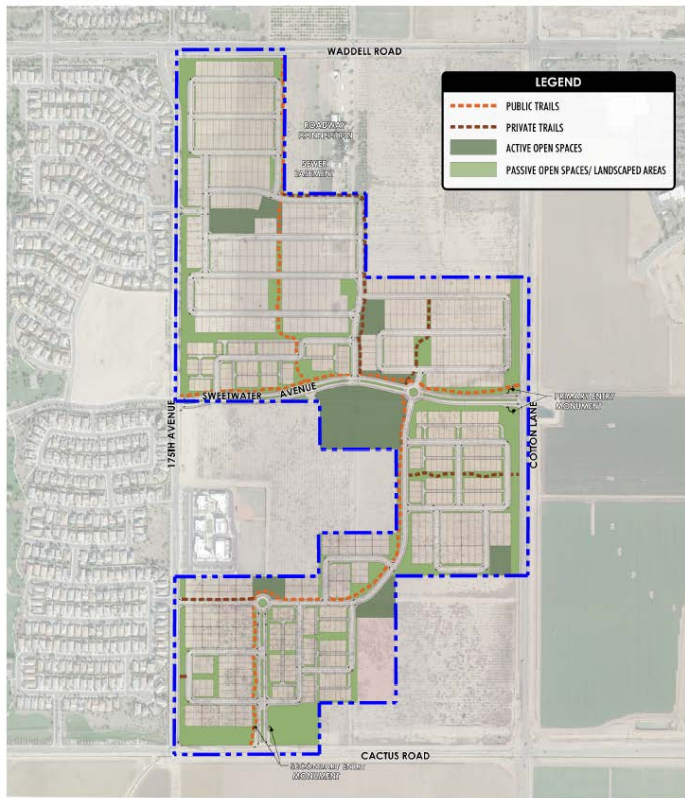
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6/1/16 MAGNOLIA/CD/PLANNING/LVA-1600 FIGURE 7 WALL DETAILS.dwg Nov 2, 2016



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016



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 120 south 4th avenue • tempe, arizona 85281 • 480.994.0994

175TH & SWEETWATER

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE: NTS

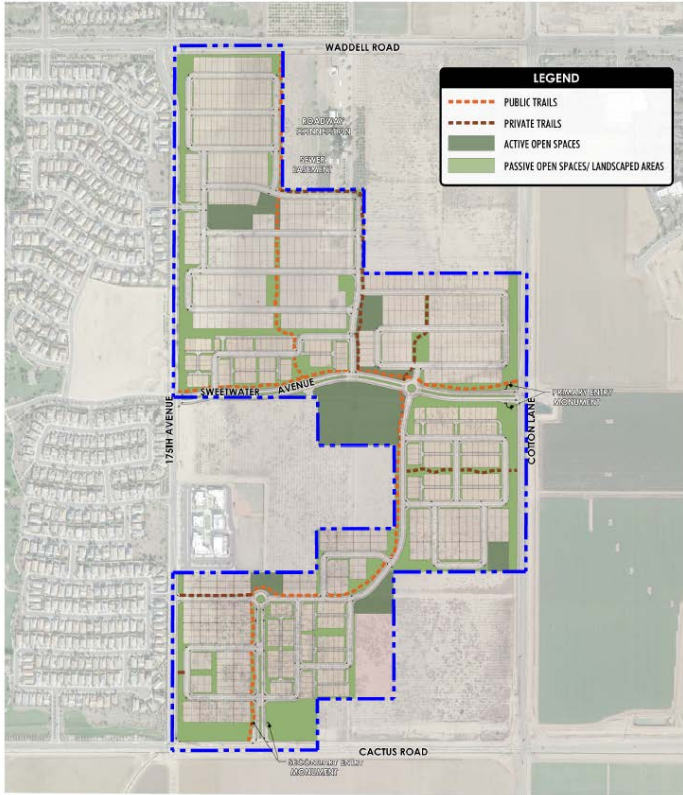
1640 DRAIN BY: PR



11/2/16

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 U:\1040-MAGNOLIA\CD\PLANNING\1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Nov 2, 2016

Amenities



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MAGNOLIA

FIGURE 4: OPEN SPACE AND TRAILS MASTER PLAN

APPROX. SCALE(S)

1640 DRAWN BY: PR



11/2/14

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 U:\1040-MAGNOLIA\LAND PLANNING\LVA-1040-FIGURE 4-OPEN SPACE TRAILS MASTER PLAN.dwg Rev 2, 2015



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MAGNOLIA

FIGURE 5: TRUMAN COMMUNITY CENTER SKETCH CONCEPT

APPROX. SCALE(S)

1640 DRAWN BY: PR



11/2/14

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 U:\1040-MAGNOLIA\LAND PLANNING\LVA-1040-FIGURE 5-TRUMAN COMMUNITY CENTER SKETCH CONCEPT.dwg Aug 20, 2015



FS16-392

Amenities

Commission Recommendation:

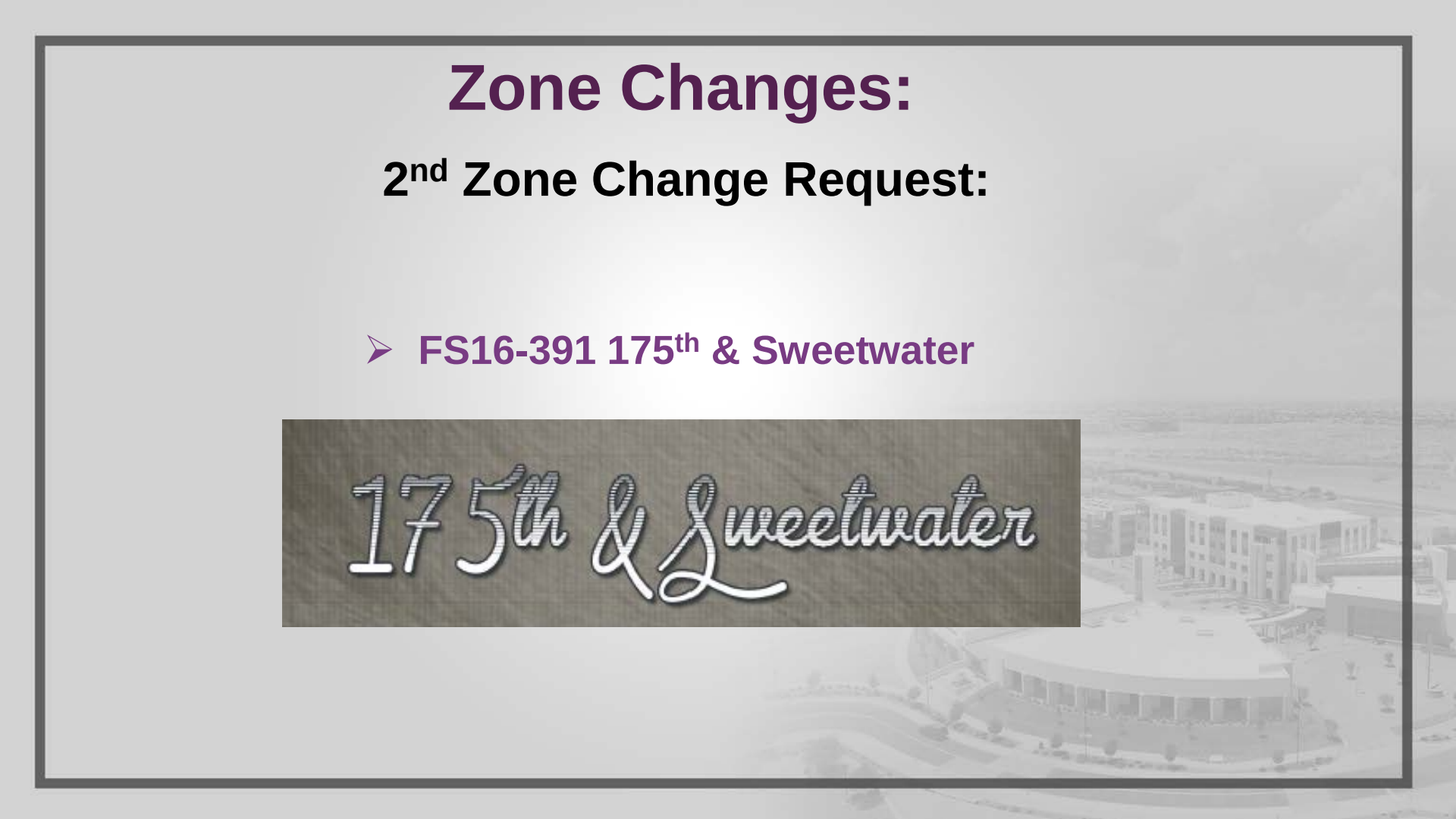


- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”

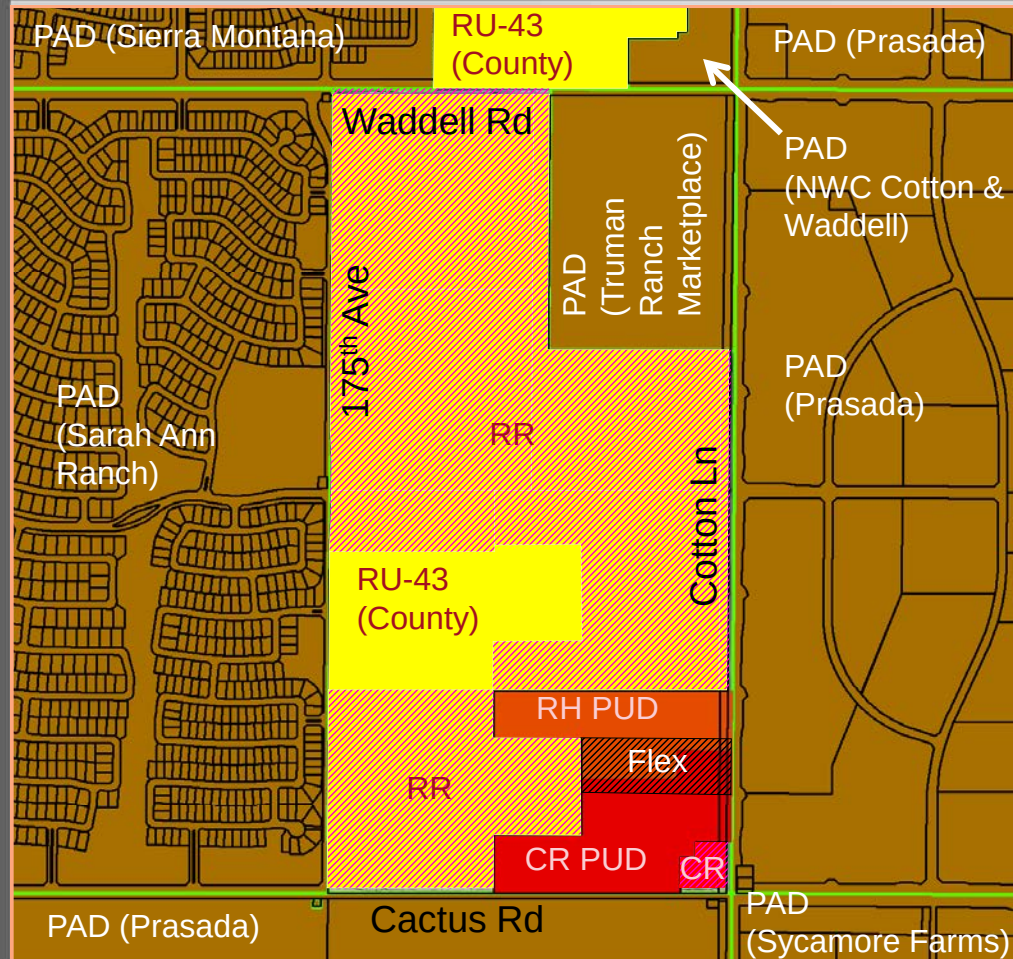
Zone Changes:

2nd Zone Change Request:

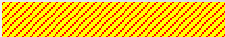
- FS16-391 175th & Sweetwater



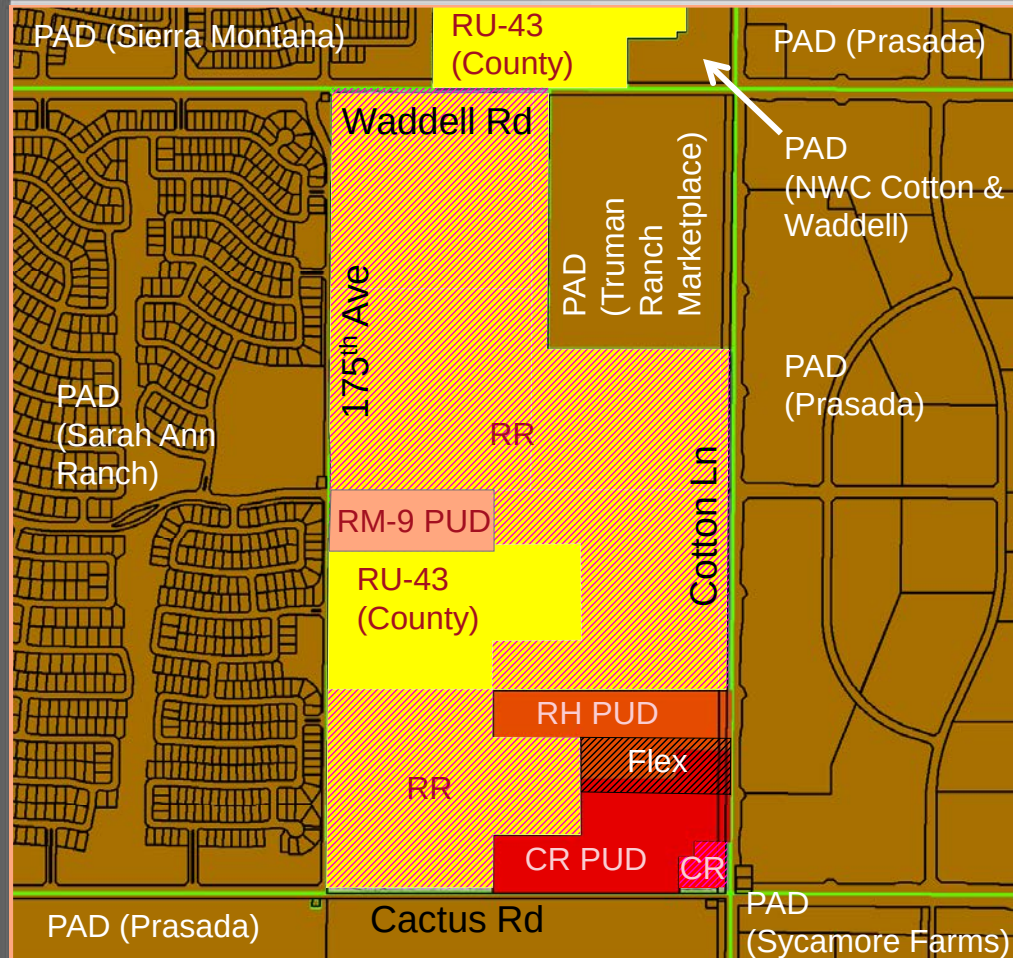
175th & Sweetwater



Zone Change

-  Existing Surprise PAD Zoning
-  Existing County RU-43 Zoning
-  Post-Annexation Surprise RR Zoning*
-  Post-Annexation Surprise CR Zoning*
-  Existing Surprise RH PUD Zoning
-  Existing Surprise CR PUD Zoning
-  Existing Surprise CR PUD / RH PUD Flex Zoning

*Post-Annexation zoning presumes prior City Council approval of Annexation request covered under FS16-427



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning

175th & Sweetwater
FS16-391

- Proposed RM-9 PUD Zoning

Zone Change

175th & Sweetwater
FS16-391



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175TH & SWEETWATER

FIGURE 3: DEVELOPMENT PLAN CONCEPT

APPROX. SCALE: 1/8" = 1'-0"

1640 DRAIN BY: PR



11/2/14

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11/16/14 ANAROLUCAD/PJ/ANNOUNCING-1640-FIGURE 3 DEVELOPMENT PLAN CONCEPT.dwg, Rev. 2, 2014

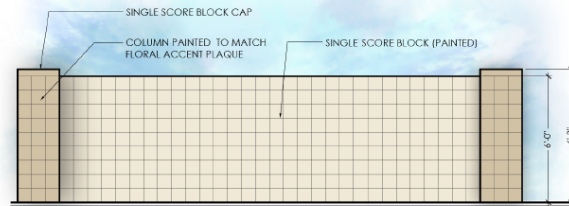
Table 1: RM-9 FUD Development Standards

Development Standard	RM-9 City Base Standard	Proposed RM-9 FUD Standard
Maximum Number of Units	N/A	525
Maximum Density	9.0	9.0
Minimum Lot Area (sf)	4,500	3,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	60
Minimum Front Yard Setback (ft) (1)(2)	12/20	8/20
Minimum Side Yard Setback (ft) (3)	TBD	5
Minimum Rear Yard Setback (ft)	20	13
Maximum Building Height (ft)	35	35

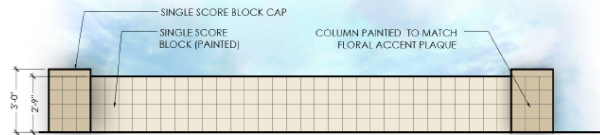
Footnotes:

- (1) Front facing garages shall have a minimum 20' front yard setback where facing a public street. Livable space, front porches, courtyards and side entry garage shall have a minimum 8' setback (unless adjacent to a FUE, in which case the minimum front setback shall be 10').
- (2) Where an 8' FUE is provided adjacent to a front yard, a minimum 10' front setback is required to provide a minimum 2' separation between the FUE and the building.
- (3) For side yards abutting a public street, a minimum 5' landscape tract shall be provided between the right-of-way and the lot. Coupled with the minimum 5' side yard setback, this will provide for a minimum of 10' between the ROW and the building where adjacent to a public street.

Monuments and Walls



THEME WALL



PONY WALL

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”

Preliminary Plats:

Two companion requests:

- FS16-391 175th & Sweetwater

175th & Sweetwater

- FS16-392 Magnolia



Preliminary Plats:

1st Pre-Plat request:

➤ **FS16-392 Magnolia**



LEGAL DESCRIPTION

THAT PORTION OF THE NORTHEAST QUARTER AND THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2, WEST OF THE GILA AND SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA DESCRIBED AS FOLLOWS:

COMMENCING AT A BRASS CAP FOUND AT THE SOUTHWEST CORNER OF SAID SECTION 14, FROM WHICH A BRASS CAP FOUND AT THE SOUTH QUARTER CORNER OF SAID SECTION 14 BEARS SOUTH 89°48'58" WEST, 2,645.91 FEET.

THENCE ALONG THE SOUTH LINE OF SAID SOUTHWEST QUARTER, SOUTH 89°48'58" WEST, 1,566.22 FEET TO A POINT THAT LIES 1,566.24 FEET EASTERN OF THE SOUTH QUARTER CORNER OF SAID SECTION 14, THENCE NORTH 00°12'02" WEST, 33.00 FEET TO A POINT ON THE NORTH LINE OF THAT 33.00 FOOT WIDE SECTION 14, THENCE ALONG THE NORTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, MARICOPA COUNTY, ARIZONA, SAID POINT BEING THE POINT OF BEGINNING.

THENCE ALONG THE NORTH LINE OF SAID DEDICATED RIGHT OF WAY, SOUTH 89°48'58" WEST, 1,089.01 FEET TO A POINT ON THE WEST LINE OF SAID SOUTHWEST QUARTER.

THENCE ALONG THE WEST LINE OF SAID SOUTHWEST QUARTER, NORTH 00°12'48" EAST, 1,295.63 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE SOUTH LINE OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 1,089.01 FEET TO THE SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709, RECORDS OF MARICOPA COUNTY, ARIZONA, NORTH 89°48'58" EAST, 1,077.57 FEET, TO THE MOST SOUTHWESTLY SOUTHWEST CORNER OF THAT REAL PROPERTY DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 316.90 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 89°48'58" EAST, 594.03 FEET.

THENCE CONTINUING ALONG THE EASTERN LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, NORTH 00°12'02" WEST, 633.80 FEET TO THE NORTHEAST CORNER OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709.

THENCE ALONG THE WESTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2015-088709, SOUTH 89°48'58" WEST, 570.93 FEET TO A POINT ON THE WEST LINE OF THAT REAL PROPERTY DESCRIBED AS PARCEL NO. 2 IN DOCUMENT NO. 2009-1021524, RECORDS OF MARICOPA COUNTY, ARIZONA.

THENCE ALONG THE WESTERLY LINE OF THAT REAL PROPERTY AS DESCRIBED IN SAID DOCUMENT NO. 2009-1021524, NORTH 00°12'02" WEST, 337.04 FEET TO A POINT ON THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14, SOUTH 89°48'58" WEST, 1,089.01 FEET TO AN ALUMINUM CAP, MARKED PLEN RLS 421377 FOUND AT THE CENTER OF SAID SECTION 14.

THENCE ALONG THE WEST LINE OF SAID NORTHEAST QUARTER, NORTH 00°12'48" EAST, 2,607.85 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 33.0 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 810.02 FEET TO A POINT ON THE EAST LINE OF THE WEST 810.02 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'48" WEST, 1,050.02 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1053.0 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 811.78 FEET TO A POINT ON THE EAST LINE OF THE WEST 1053.0 FEET OF THE EAST HALF OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID EAST LINE, SOUTH 00°12'02" WEST, 833.00 FEET TO A POINT ON THE SOUTH LINE OF THE NORTH 1715.99 FEET OF SAID NORTHEAST QUARTER.

THENCE ALONG SAID SOUTH LINE, NORTH 89°50'33" EAST, 1,188.86 FEET TO A POINT ON THE WEST LINE OF THE EAST 33.0 FEET OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 823.34 FEET.

THENCE CONTINUING ALONG SAID SOUTH LINE, SOUTH 00°12'04" WEST, 1,308.02 FEET TO A POINT ON THE NORTH LINE OF THE SOUTH 1,332.60 FEET OF THE SOUTHWEST QUARTER OF SAID SECTION 14.

THENCE ALONG SAID SOUTH LINE, SOUTH 89°48'58" WEST, 958.17 FEET.

THENCE SOUTH 89°48'58" WEST, 287.98 FEET.

THENCE SOUTH 00°12'02" EAST, 633.80 FEET.

THENCE SOUTH 89°48'58" WEST, 285.54 FEET.

THENCE SOUTH 00°12'02" EAST, 348.90 FEET TO THE POINT OF BEGINNING.

SAID PARCEL CONTAINING 3,752,358 SQUARE FEET OR 173.838 ACRES, MORE OR LESS.

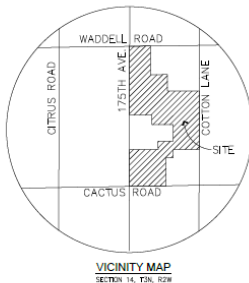
MAGNOLIA PRELIMINARY PLAT SURPRISE, ARIZONA

A PORTION OF THE EAST HALF OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA & SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA

SITE DATA

EXISTING ZONING: 110.0 A
GRID AREA: 101.4
NET AREA: 101.4
GROSS AREA: 101.4
NET AREA: 101.4
GROSS AREA: 101.4

89-0 PLO 6 89-0 PLO 6
110.0 A PLO 6 89-0 PLO 6
101.4 PLO 6 89-0 PLO 6
101.4 PLO 6 89-0 PLO 6
101.4 PLO 6 89-0 PLO 6
101.4 PLO 6 89-0 PLO 6



VICINITY MAP
SECTION 14, T3N, R2W
N10

FLOOD ZONE CERTIFICATION

THIS IS TO CERTIFY THAT A PORTION OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE FLOOD HAZARD AREA AS SHOWN ON THE PLAT OF SURVEY AND THAT THE REMAINDER OF THE SURVEYED PROPERTY IS LOCATED WITHIN THE UNSHADDED ZONE. FLOOD HAZARD AREA IS SHOWN ON PARCEL NUMBER 000130000, DATED OCTOBER 16, 2013, AS PROVIDED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA). THE FLOOD ZONE BOUNDARY IS LOCATED BY SCALED MAP LOCATION AND GRAPHIC PLOTTING ONLY.

ZONE "A" AS DEFINED BY FEMA IS: SPECIAL FLOOD HAZARD AREAS INUNDATED BY THE 1% ANNUAL CHANCE FLOOD, NO LONGER FLOOD DEPARTMENTS (DEPARTMENTS).

SHADDED ZONE "X" AS DEFINED BY FEMA IS: AREAS OF 0.2% ANNUAL CHANCE FLOOD AREAS OF 1% ANNUAL CHANCE FLOOD WITH AVERAGE DEPTH OF LESS THAN 1 FOOT OR WITH GRAVITATIONAL AREAS LESS THAN 1 SQUARE MILE, AND AREAS PROTECTED BY LEVEES FROM 1% ANNUAL CHANCE FLOOD.

DEVELOPER

SURPRISE ALIVE PARTNERS, LLC
11024 N. 28TH DRIVE, SUITE 170
PHOENIX, ARIZONA 85034

PHONE: (602) 499-0889
CONTACT: JOSEPH HADWIN
PLANNER

LIA LORAN DESIGN STUDIO
130 SOUTH 4TH AVENUE
TUCSON, ARIZONA 85709

PHONE: (520) 478-5151
FAX: (520) 478-5151
E-MAIL: ryan@lms.com

SAUNDERS AND ASSOCIATES, INC.
4000 EAST WASHINGTON STREET, SUITE 250
PHOENIX, ARIZONA 85034

PHONE: (602) 478-5151
FAX: (602) 478-5151
E-MAIL: ryan@lms.com

SHEET INDEX

1 COVER SHEET
2 DETAIL AND CROSS SECTIONS
3-14 PRELIMINARY PLAT
15-17 BORING AND MARKING PLANS
18-20 SOLID WASTE COLLECTION ROUTE

BASIS OF BEARING

SOUTH 89°48'58" WEST, THE MEASURED BEARING BETWEEN A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND COTTON LAKE AND A POINT ON THE SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND 175TH AVENUE AS SHOWN HEREIN, UTILIZING THE LIDAR SMARTNET GPS NETWORK.

RELATIVE TO MARICOPA COUNTY, ARIZONA LOW DESCRIPTION PROJECTION.

LINEAR UNIT: INTERNATIONAL FEET
ANGULAR UNIT: DEGREES
PROJECTION TYPE: LAMBERT CONFORMAL CONIC (SINGLE PARALLEL)

LATITUDE OF ORIGIN: 33°15'00" N
CENTRAL MERIDIAN: 112°15'00" W
FALSE NORTHING: 1,500,000.000 IN
FALSE EASTING: 2,500,000.000 IN
STANDARD PARALLEL SCALE: 1.000000 (EXACT)

BENCHMARK

2 INCH CITY OF SURPRISE BRASS OR WITH RAISED DATUM POINT - MARKED CITY OF SURPRISE BENCHMARK 2017 1008.7 - LOCATED ON TOP OF GRANITE CURB APPROXIMATELY 700 FEET NORTH OF THE INTERSECTION OF CACTUS ROAD AND COTTON LAKE ON THE EAST SIDE OF COTTON LAKE.

ELEVATION 1246.65 NORTH AMERICAN VERTICAL DATUM 1988 (NAV88)

LEGEND

- CENTERLINE
- RIGHT OF WAY
- PROPERTY LINE
- EASEMENT
- ELECTRICAL
- GAS
- SANITARY SEWER
- TELEPHONE
- WATER
- OVERHEAD ELECTRICAL
- FLOW LINE
- IRRIGATION LINE
- PILE
- VALVE
- STORM DRAIN
- SEWER MANHOLE
- SEWER CLEANOUT
- EXISTING ELEVATION CONTOUR
- FLOW ARROW
- SIGN
- WATER VALVE
- FIRE HYDRANT
- GRADE BREAK
- MATCH LINE
- PARCEL LINE
- FLOODPLAIN UNITS



FS16-392

Preliminary Plat

PRELIMINARY PLAT
FOR
MAGNOLIA
CITY OF SURPRISE, ARIZONA

ANNEAL CASE #
P16-047
DRAWING CASE #
P16-392

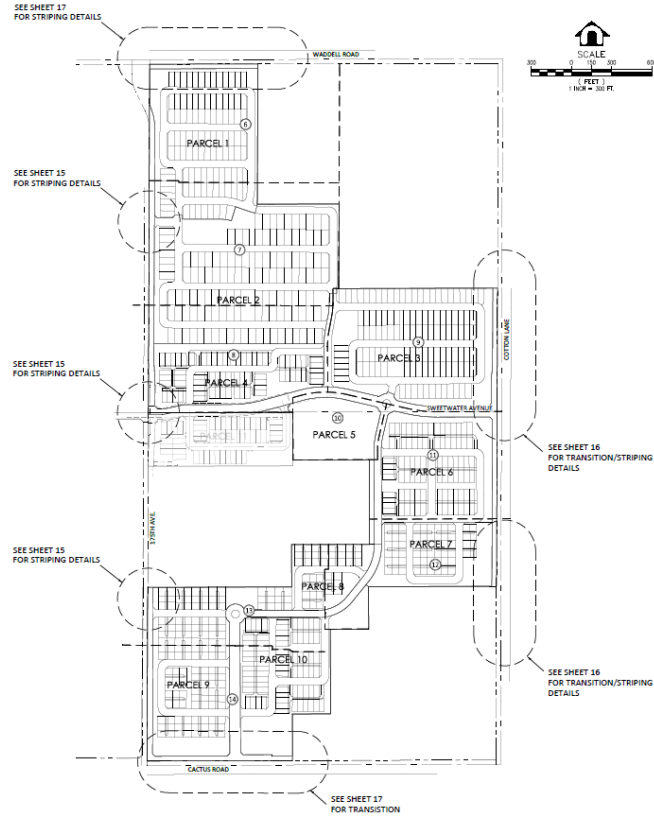
SECTION 14
TOWNSHIP 3N
RANGE 2W

JOB NO.
A00000002

1 SHEET
OF 20



Primary Plat



2	ASCE 709	1	 SHEET INDEX FOR MAGNOLIA CITY OF SURPRISE, ARIZONA	 DAVID WANG LANDSCAPE ARCHITECT 1400 N. Wenden Road, Suite 200 Phoenix Arizona 85040	DATE: 11/2016 PROJECT NAME: 150313 E. E. E. E.
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Preliminary Plat



FS16-392

- 812 Lots Total
 - 215, 45' x 110 Standard Lots in the RM-6 PUD Zoning District
 - 125, 55' x 115' Standard Lots in the RM-6 PUD Zoning District
 - 224, Alley Loaded Lots in the RM-9 PUD Zoning District
 - 248, Cluster Lots in the RM-9 PUD Zoning District

Preliminary Plat



FS16-392

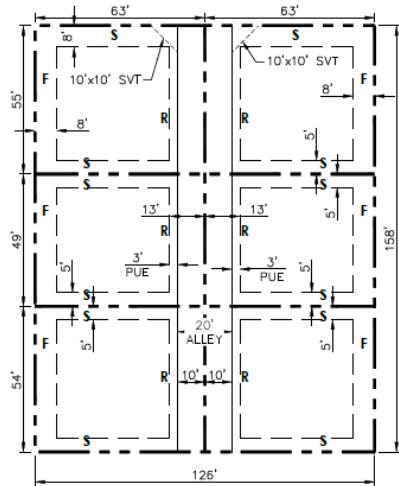
- Will integrate with 175th & Sweetwater Project
- Phase I must plat concurrently with 175th & Sweetwater Project or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities with the 175th & Sweetwater project and be part of a combined Magnolia HOA

Preliminary Plat

FS16-392



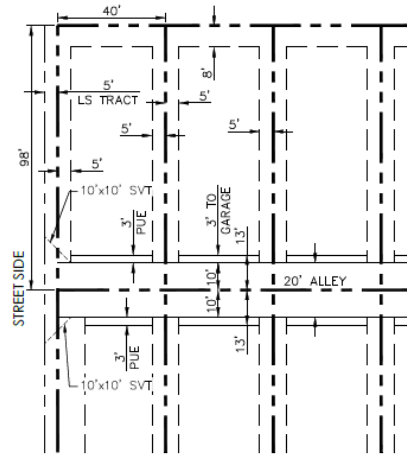
CLUSTER PRODUCT



F	= FRONT YARD
R	= REAR YARD
S	= SIDE YARD

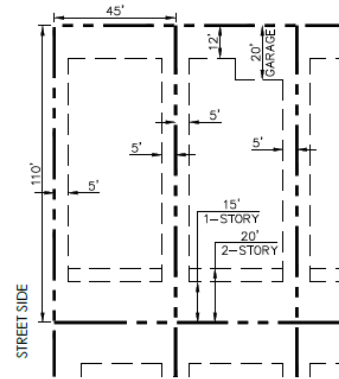
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
STREET SIDE:	8' (10' WHERE ADJACENT TO AN 8' PUE)
REAR: (ALLEY)	13'

ALLEY PRODUCT (3,920 S.F.)



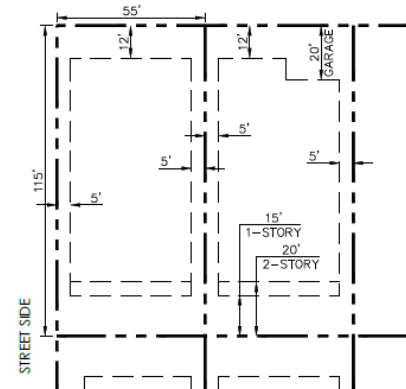
FRONT:	8' (10' WHERE ADJACENT TO AN 8' PUE)
SIDE:	5'
REAR: (ALLEY)	13'

45' X 110' LOT SIZE (4,950 S.F.)



FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

55' X 115' LOT SIZE (6,325 S.F.)

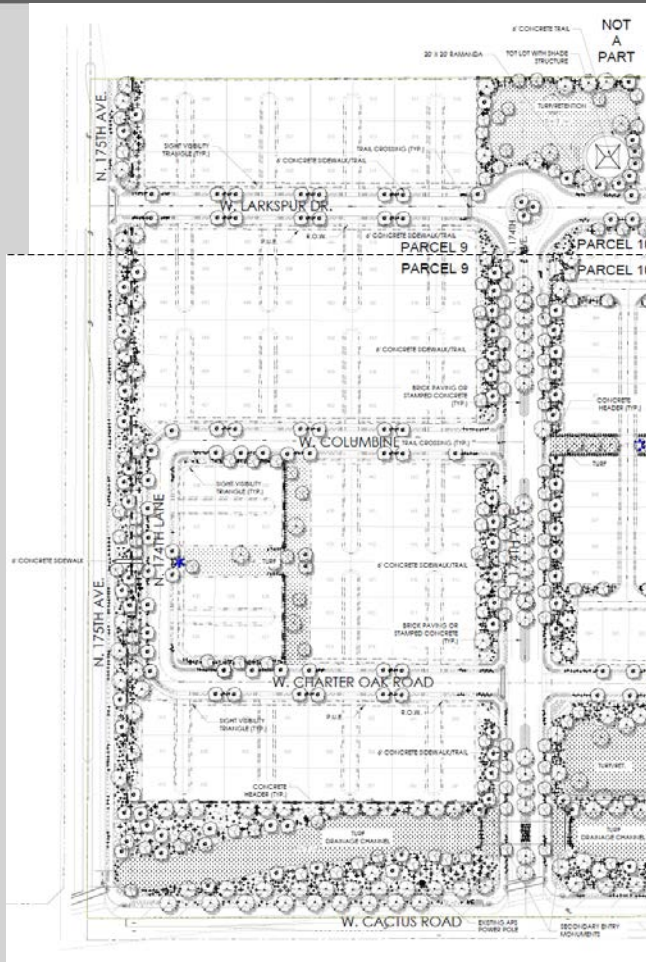


FRONT:	12' (LIVEABLE OR SIDE ENTRY GARAGE)
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	15' (1-STORY) 20' (2-STORY)

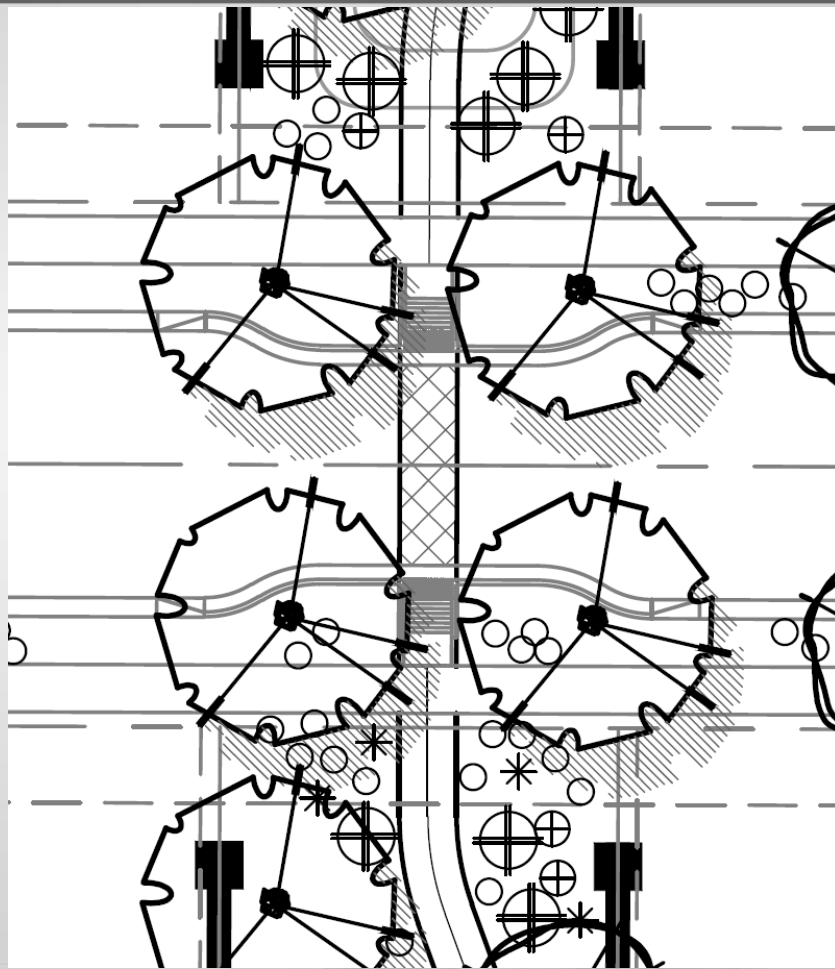
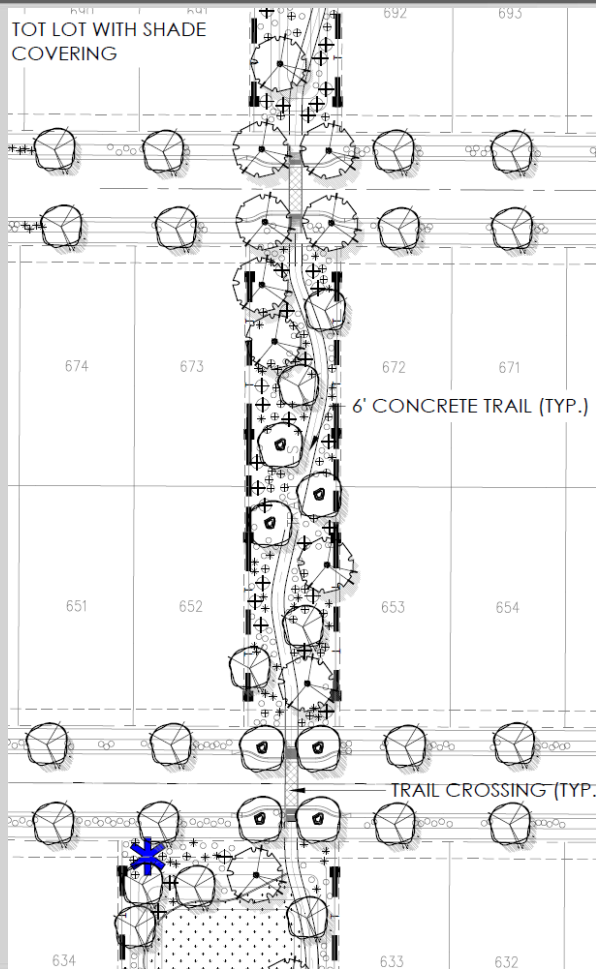


FS16-392

Preliminary Plat

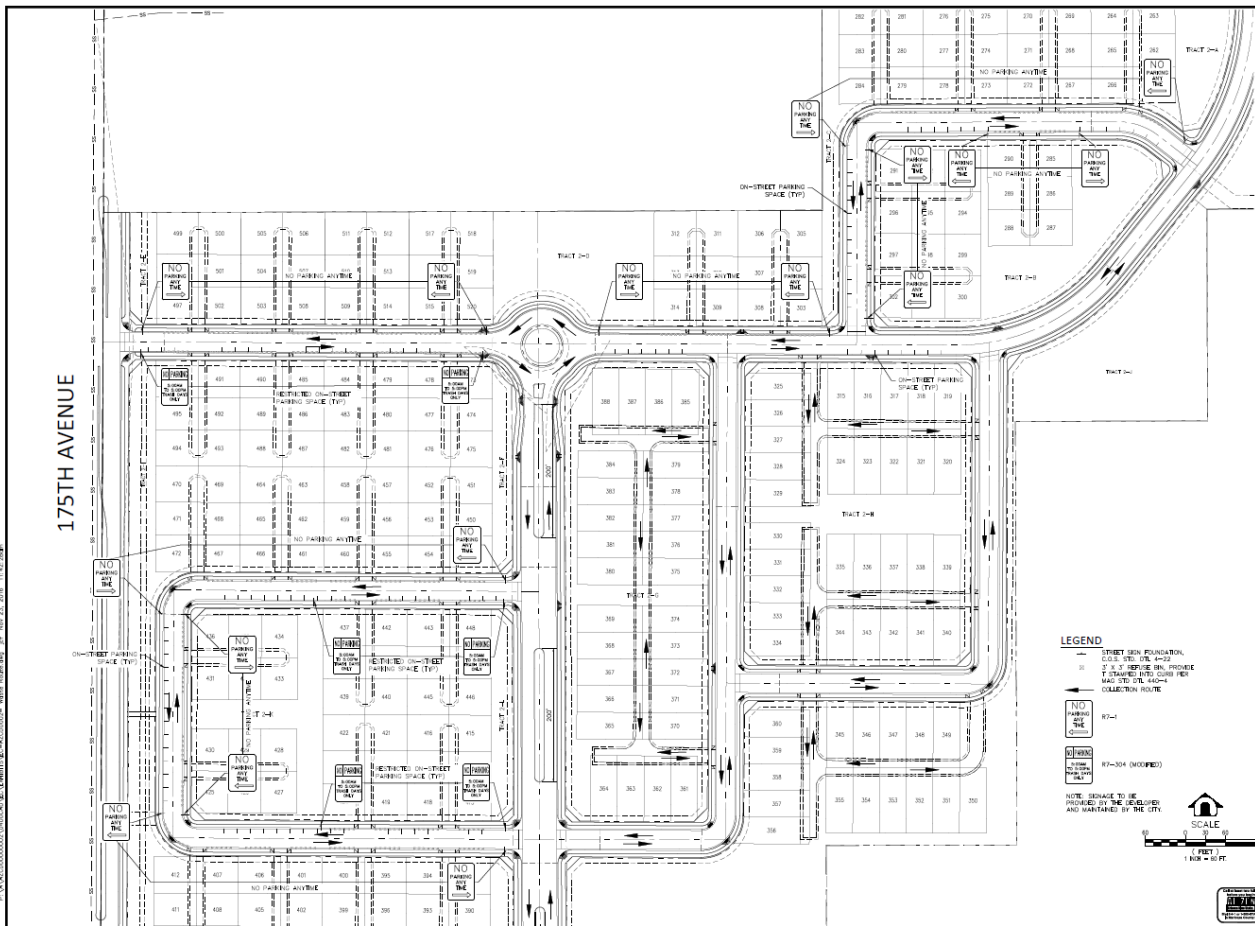


TOT LOT WITH SHADE
COVERING



FS16-392

Preliminary Plat



FS16-392

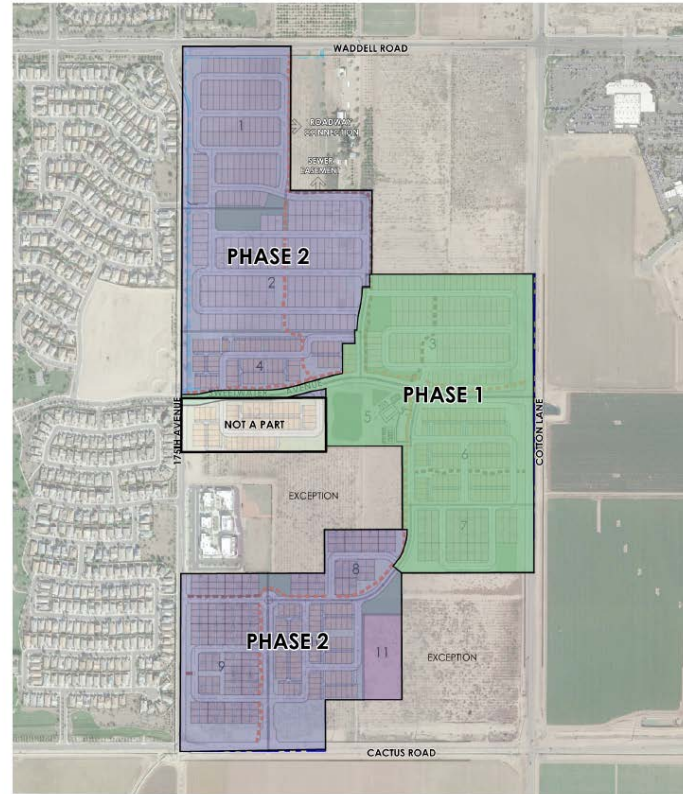
Preliminary Plat

SOLID WASTE COLLECTION ROUTE FOR MAGNOLIA CITY OF ARIZONA		 DAVID EVANS <i>Mayor</i> 4001 West Magnolia Blvd. Suite 202 Phoenix, Arizona 85018 602.733.6600		ROUTE NAME: _____ START DATE: _____ END DATE: _____ SHEET # OF _____ DATE: 1/22/16	
--	--	--	--	--	--



FS16-392

Preliminary Plat



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 land planning • development entitlements • landscape architecture
 120 south oak avenue • tempe, arizona 85281 • 480.794.0994

MAGNOLIA

FIGURE 8: CONCEPTUAL PHASING PLAN

APPROX. SCALE: 1/8" = 1' 1/4"

1/8" = 1' 1/4" DRAWN BY: PR



9/8/16

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 U:\1640-MAGNOLIA\CD\PLANNING\1640-FIGURE 8-CONCEPTUAL PHASING PLAN.dwg Sep 8, 2016

Commission Recommendation:



- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

Preliminary Plats:

2nd Pre-plat request:

- ## ➤ FS16-391 175th & Sweetwater

17 5th & Sweetwater

LEGAL DESCRIPTION

THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

EXCEPT ONE-HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN SACKETT BSA, PAGE 292, AND

EXCEPT THAT PART OF THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHWEST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 333.01 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89° 59' 50" WEST, ALONG SAID LINE, A DISTANCE OF 1,223.99 FEET TO A POINT THAT LIES 1,089.24 FEET EASTERLY OF THE SOUTH QUARTER CORNER OF SAID SECTION 14;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 381.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 573.52 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 633.60 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 575.97 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 316.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 1,484.01 FEET;

THENCE SOUTH 0° 22' 01" WEST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 999.62 FEET;

THENCE SOUTH 89° 59' 50" WEST, A DISTANCE OF 150.00 FEET;

THENCE SOUTH 0° 22' 01" WEST, A DISTANCE OF 100.00 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 100.00 FEET;

THENCE SOUTH 0° 22' 01" WEST, A DISTANCE OF 233.01 FEET TO THE POINT OF BEGINNING; AND EXCEPT THAT PART OF THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHWEST CORNER OF SAID SECTION 14, WHEN POINT BEARS SOUTH OF 22° 01' WEST A DISTANCE OF 2,040.39 FEET FROM THE EAST QUARTER CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 1,589.58 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89° 59' 50" WEST, ALONG SAID LINE, A DISTANCE OF 1,089.24 FEET TO THE SOUTH QUARTER CORNER OF SAID SECTION 14;

THENCE NORTH 0° 25' 49" EAST, ALONG THE MID-MERIDIAN, A DISTANCE OF 1,332.63 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 1,077.62 FEET;

THENCE SOUTH 0° 00' 10" WEST, A DISTANCE OF 316.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 575.97 FEET;

THENCE NORTH 0° 00' 10" WEST, A DISTANCE OF 633.60 FEET;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 573.52 FEET;

THENCE SOUTH 0° 00' 10" WEST, A DISTANCE OF 381.90 FEET TO THE POINT OF BEGINNING; EXCEPT ONE-HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN SACKETT BSA, PAGE 292, AND

EXCEPT THAT PART OF THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHWEST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET;

THENCE NORTH 0° 22' 01" EAST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 1,332.63 FEET TO THE POINT OF BEGINNING;

THENCE NORTH 89° 59' 50" WEST, A DISTANCE OF 1,484.01 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 316.90 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 584.03 FEET;

THENCE NORTH 0° 00' 10" EAST, A DISTANCE OF 633.60 FEET;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 256.90 FEET;

THENCE NORTH 89° 59' 50" WEST, ALONG THE NORTH LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14, A DISTANCE OF 3,479.27 FEET;

THENCE SOUTH 0° 22' 01" WEST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 1,307.75 FEET TO THE POINT OF BEGINNING;

EXCEPT ONE-HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN SACKETT BSA, PAGE 292, AND

S.E.C. 175TH AVE & SWEETWATER

PRELIMINARY PLAT

SURPRISE, ARIZONA

A PORTION OF THE SOUTHEAST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA & SALT RIVER MERIDIAN, MARICOPA COUNTY, ARIZONA

LEGAL DESCRIPTION (CONTINUED)

EXCEPT THAT PART OF THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHWEST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 89° 59' 50" WEST, ALONG SAID LINE, A DISTANCE OF 256.90 FEET; THENCE NORTH 0° 22' 01" EAST, A DISTANCE OF 233.01 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 100.00 FEET;

THENCE NORTH 0° 22' 01" EAST, A DISTANCE OF 100.00 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 150.00 FEET;

THENCE SOUTH 0° 22' 01" WEST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 333.01 FEET TO THE POINT OF BEGINNING;

EXCEPT ANY PORTION OF SAID PROPERTY LINE WITHIN THAT CERTAIN HIGHWAY RIGHT OF WAY FOR THE MAIN SPUR OF THE CALIFORNIA, ARIZONA AND SANTA FE RAILWAY CO., EXTENDING FROM BEAULIEU STREET, AS CONVEYED BY DEED RECORDED IN BOOK 25 OF DEEDS, PAGE 133, RECORDS OF MARICOPA COUNTY, ARIZONA;

EXCEPT ONE-HALF OF ALL OIL, GAS AND MINERALS, AS RESERVED IN INSTRUMENT RECORDED IN SACKETT BSA, PAGE 292, AND

EXCEPT THAT PART OF THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHWEST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET;

THENCE NORTH 0° 21' 47" EAST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 1,332.63 FEET;

THENCE SOUTH 89° 59' 50" WEST, A DISTANCE OF 1,889.58 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING SOUTH 89° 59' 50" WEST, A DISTANCE OF 672.15 FEET;

THENCE NORTH 0° 25' 51" EAST, ALONG THE WEST LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14, A DISTANCE OF 648.06 FEET;

THENCE SOUTH 50° 22' 51" WEST, A DISTANCE OF 648.06 FEET TO THE POINT OF BEGINNING; AND

EXCEPT THAT PART OF THE SOUTHWEST QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, DESCRIBED AS FOLLOWS:

COMMENCING AT THE SOUTHWEST CORNER OF SAID SECTION 14;

THENCE NORTH 89° 59' 50" WEST, ALONG THE SOUTH LINE OF SAID SECTION 14, A DISTANCE OF 83.00 FEET;

THENCE NORTH 0° 21' 47" EAST, ALONG A LINE WHICH LIES 83 FEET WEST OF THE EAST LINE OF SAID SECTION 14, A DISTANCE OF 1,484.06 FEET;

THENCE SOUTH 89° 59' 50" WEST, A DISTANCE OF 1,484.06 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING SOUTH 89° 59' 50" WEST, A DISTANCE OF 405.52 FEET;

THENCE NORTH 0° 25' 51" EAST, A DISTANCE OF 648.06 FEET;

THENCE SOUTH 89° 59' 50" WEST, A DISTANCE OF 672.15 FEET TO THE WEST LINE OF THE SOUTHWEST QUARTER OF SAID SECTION 14;

THENCE NORTH 0° 25' 51" EAST, A DISTANCE OF 284.06 FEET ALONG SAID WEST LINE TO THE SOUTH LINE OF THE NORTH 405.52 FEET OF SAID SOUTHWEST QUARTER;

THENCE NORTH 89° 59' 50" EAST, 1,584.41 FEET ALONG SAID SOUTH LINE;

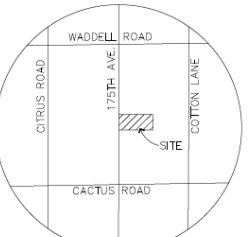
THENCE NORTH 0° 00' 10" WEST, A DISTANCE OF 444.60 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 570.96 FEET;

THENCE NORTH 0° 00' 10" WEST, A DISTANCE OF 633.60 FEET;

THENCE SOUTH 89° 59' 50" EAST, A DISTANCE OF 584.03 FEET;

THENCE SOUTH 0° 00' 10" WEST, A DISTANCE OF 316.90 FEET TO THE POINT OF BEGINNING;



VICINITY MAP

SECTION 14, T3N, R2W, AZ

SITE DATA

EXISTING ZONE: R20-9 PUD
ZONING AREA: 10.0 AC
NET AREA: 8.1 AC
LOT AREA: 8.1 AC
SUBJECT: 0.4 AC
OPEN SPACE AREA: 2.4 AC

Development Standard	R20-9 City Block Standard	Proposed R20-9 PUD Standard
Minimum Number of Units	30	32
Minimum Density	8.0	8.0
Minimum Lot Area (sq)	4,500	5,000
Minimum Lot Width (ft)	40	40
Minimum Lot Depth (ft)	100	40
Minimum Front Yard Setback (ft) (100)		8/20
Minimum Side Yard Setback (ft) (10)	to be determined	5
Minimum Rear Yard Setback (ft)	20	15
Minimum Building Height (ft)	35	35

Footnotes

- (1) Front facing garage shall have a minimum 10' front yard setback when facing a public street. Double open side yard setbacks shall have a minimum 8' setback for lot area adjacent to a PUD, or when on the minimum front setback shall be 10%.
- (2) Where an R PUD is provided adjacent to a street, a minimum 10' front setback is required to provide a minimum 2' separation between the PUD and the building.
- (3) For side yard setbacks a public street, a minimum 8' landscape tree shall be provided between the right-of-way and the lot. Coupled with the minimum 8' side yard setback, this will provide for a minimum of 10' between the ROW and the building when adjacent to a public street.

FLOOD ZONE CERTIFICATION

NO FLOOD CERTIFICATION IS REQUIRED FOR THIS PROJECT. THE PROJECT IS LOCATED WITHIN THE "ZONE 0" FLOOD HAZARD AREA AND THE PROJECT IS NOT A FLOOD HAZARD. THE PROJECT IS NOT A FLOOD HAZARD. THE PROJECT IS NOT A FLOOD HAZARD. THE PROJECT IS NOT A FLOOD HAZARD.

SHADES OF GRAY ARE SHOWN BY FEMA. THE PROJECT IS NOT A FLOOD HAZARD. THE PROJECT IS NOT A FLOOD HAZARD. THE PROJECT IS NOT A FLOOD HAZARD. THE PROJECT IS NOT A FLOOD HAZARD.

DEVELOPER

SURPRISE VALLEY PARTNERS, LLC
11024 N. 28TH DRIVE, SUITE 170
MESA, ARIZONA 85205

PLANNER

LVA URBAN DESIGN STUDIO
125 SOUTH MAIN AVENUE
TAMPA, ARIZONA 85001
CONTACT: MARK REIDINE
PHONE: (480) 994-0894

ENGINEER

DAVID DAVIS AND ASSOCIATES, INC.
4800 EAST WASHINGTON STREET, SUITE 200
PHOENIX, ARIZONA 85034
PHONE: (602) 636-1031
FAX: (602) 678-5155
CONTACT: SHARA DEWIDY, PE
e-mail: ryd@me.com

SHEET INDEX

1. CIVIL/MECHANICAL MAP
2. STREET CROSS SECTIONS
3. UTILITIES
4. PRELIMINARY PLAT
5. SOLID WASTE COLLECTION ROUTE PLAN

BASIS OF BEARING

SOUTH SOUTHWEST, THE MEASURED BEARING BETWEEN A FOUND CITY OF SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND COTTON LANE AND A FOUND CITY OF SURPRISE BRASS CAP AT THE INTERSECTION OF CACTUS ROAD AND 175TH AVENUE, AS SHOWN HEREIN, UTILIZING THE LOCAL SHARPNET GPS NETWORK.

RELATIVE TO MARICOPA COUNTY, ARIZONA LOCAL DISTRIBUTION

SECTION

UNIVERSAL FEET: 1420 1983
HORIZONTAL DATE: 1983
PROJECT TYPE: LARGEST COMMON CORNER (SHOULD PARALLEL)

LATITUDE OF CORNER: 33°15'00" N
CENTRAL MERIDIAN: 112°12'00" W
FALSE NORTHING: 3,500,000.000 MM
FALSE EASTING: 2,500,000.000 MM
STANDARD PARALLEL SCALE: 1:100,000 (EXACT)

BENCHMARK

2 INCH CITY OF SURPRISE BRASS CAP WITH RANGED DATUM POINT - MARKED CITY OF SURPRISE BENCHMARK CITY 2003.7 - LOCATED ON TOP OF SHARADE SCULPTED APPROXIMATELY 700 FEET NORTH OF THE INTERSECTION OF CACTUS ROAD AND COTTON LANE ON THE EAST SIDE OF COTTON LANE.

ELEVATION 1248.85 NORTH AMERICAN VERTICAL DATUM 1988 (NAVD83)

LEGEND

- CENTERLINE
- RIGHT OF WAY
- PROPERTY LINE
- EASEMENT
- ELECTRICAL
- GAS
- SANITARY SEWER
- TELEPHONE
- WATER
- OVERHEAD ELECTRIC
- FLOW LINE
- STORM DRAIN
- SEWER MANHOLE
- UTILITY POLE / REFER
- CATCH BASIN
- STORM DRAIN MANHOLE
- SIGN
- FIRE HYDRANT
- GROUND BREAK

PRELIMINARY PLAT
SEC 175TH AVE & SWEETWATER
CITY OF SURPRISE, ARIZONA

DATE: 10/20/2022
SHEET: 1 OF 5

175th & Sweetwater
FS16-391

Preliminary Plat

Preliminary Plat

175th & Sweetwater
FS16-391

- 49 Alley Loaded Lots in RM-9 PUD Zoning District
- Will integrate with Magnolia
- Must plat concurrently with Magnolia Phase I or Sweetwater Avenue to come in through separate MOD
- Will share Magnolia amenities and be part of the Magnolia HOA

175th & Weethaler
FS16-391

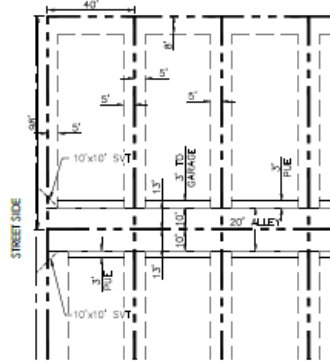


Preliminary Plat

175th & Sweetwater
FS16-391

ALLEY PRODUCT (3,920 S.F.)

FRONT STREET



FRONT:	8' 10' WHERE ADJACENT TO AN 8' PUBL
SIDE:	5'
REAR: (ALLEY)	13'

Commission Recommendation:

175th & Sweetwater

- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



Commission Recommendations*:

*** Assumes prior City Council approval of related annexation)**



175th & Sweetwater

- **FS16-391 175th & Sweetwater Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-391 175th & Sweetwater Preliminary Plat –**
Approve subject to stipulations “a” through “g”



- **FS16-392 Magnolia Zone Change –**
Approve subject to stipulations “a” through “c”
- **FS16-392 Magnolia Preliminary Plat –**
Approve subject to stipulations “a” through “h”

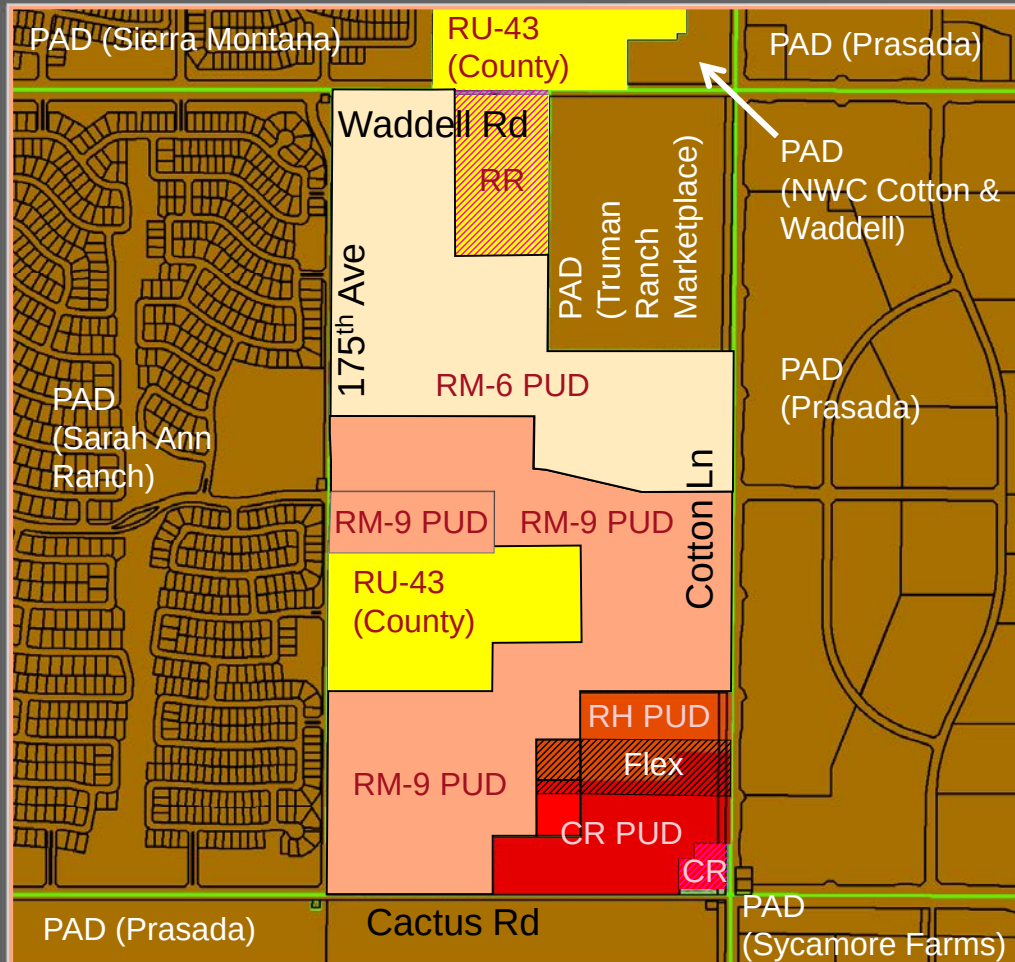


SURPRISE

ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



Zone Change

- Existing Surprise PAD Zoning
- Existing County RU-43 Zoning
- Post-Annexation Surprise RR Zoning
- Post-Annexation Surprise CR Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning



175th & Sweetwater
FS16-391

- Proposed RM-9 PUD Zoning
- Proposed RM-6 PUD Zoning
- Proposed RH PUD Zoning
- Proposed CR PUD Zoning
- Proposed CR PUD / RH PUD Flex Zoning



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date: January 17, 2017

Contact Person: Sherry Ann Aguilar, City Clerk

Submitting Department:

District: Internal

Staff Recommendations: None

Consent

Regular

Public Hearing

Report/Discussion

Agenda Wording:

Consideration and action to select a Vice-Mayor.

Motion:

I move to approve selecting _____ to serve as Vice-Mayor.

Background:

Sec. 2-41. - Vice-mayor; selection and role.

(a) Eligibility. Any council member, other than the mayor, may serve as vice-mayor, whether or not the member has served as vice-mayor previously.

(b) Selection.

(1) Not later than January 30th of each year, the city council shall select one of its members, other than the mayor, to serve as vice-mayor. The member selected as vice-mayor will serve as such until the member resigns the office, vacates council, or is replaced by another member as vice-mayor.

(2) Any council member may nominate any council member, including him/herself, to serve as the vice-mayor. All nominations must occur prior to voting. The council must vote by written ballot. The candidate receiving a majority of the votes cast will serve as vice-mayor. In the event that no candidate receives a majority of votes cast, the two candidates receiving the highest number of votes will be considered in a run-off vote. Voting must be repeated until a vice-mayor is selected. The meeting may not adjourn or recess until a vice-mayor is selected.

(c) Absence or inability to perform duties.] The vice-mayor will perform the duties of the mayor in the absence or inability of the mayor to perform his or her duties. In the absence or inability of the vice-mayor to perform the duties of the mayor, the most senior council member will perform the duties of mayor/vice-mayor. Seniority is determined by the then current number of consecutive years the member has served on the council.

(Ord. No. 2013-09, 2(Exh. A), 11-12-2013)

Objective Analysis:

Policy Compliant:

Financial Impact:

Budget Impact:

FTE Impact:

ATTACHMENTS:

Click to download

No Attachments Available



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date:	January 17, 2017	Contact Person:	Lindsey Duncan, Finance Director
Submitting Department:	Finance Dept	District:	Citywide
Staff Recommendations:	No Action		

Consent	Regular	Public Hearing	Report/Discussion
---------	---------	----------------	-------------------

Agenda Wording:

Discussion pertaining to the fiscal year 2016 annual audit and Comprehensive Annual Financial Report, and associated reports.

Motion:

None, informational only.

Background:

The city is subject to an annual audit performed by external auditors. Each year the finance department, in conjunction with the city's external auditors, produce the city of Surprise CAFR, Single Audit, Management Letter, Communication with Governance, Annual Expenditure Limitation (AELR) Report, and Highway User Revenue Fund (HURF) Report.

Objective Analysis:

A "clean" or unmodified opinion is the goal of all cities.

Policy Compliant:

The reports have met the requirements of external regulators.

Financial Impact:

There is no financial impact as these reports are for informational purposes only.

Budget Impact:

There is no budget impact as these reports are for informational purposes only.

FTE Impact:

The number of full time equivalents (FTE) is not impacted by this item.

ATTACHMENTS:

Click to download

- ☐ [FY2016 CAFR](#)
 - ☐ [FY2016 ELR](#)
 - ☐ [FY2016 Governance Communication](#)
 - ☐ [FY2016 HURF report](#)
 - ☐ [FY2016 Management Letter](#)
 - ☐ [FY2016 Single Audit](#)
-



CITY OF SURPRISE, ARIZONA COMPREHENSIVE ANNUAL FINANCIAL REPORT

For the fiscal year ended June 30, 2016

SURPRISEAZ.GOV

6102YE

CITY OF SURPRISE, ARIZONA

COMPREHENSIVE ANNUAL FINANCIAL REPORT

For the fiscal year ended
June 30, 2016

Prepared by:
Finance Department



SURPRISE

ARIZONA

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SURPRISE

ARIZONA

INTRODUCTORY SECTION

The Introductory Section is the first of three essential components of the City's Comprehensive Annual Financial Report (CAFR). The second essential component is the Financial Section, and the third is the Statistical Section. The Introductory Section provides general information on the City's structure and personnel as well as information useful in assessing the City's economic condition, with the letter of transmittal as the key element to formally introduce the CAFR to the intended readers.



Finance Department
16000 N. Civic Center Plaza
Surprise, AZ 85374-7470
Ph: 623-222-1800
Fax: 623-222-1801
TTY: 623-222-1002

December 19, 2016

Honorable Mayor, Members of the City Council, and City Manager:

In accordance with the requirements of Arizona Revised Statutes (A.R.S.) § 41-1279.07, I am pleased to submit the Comprehensive Annual Financial Report (CAFR) of the City of Surprise, Arizona (the City), for the fiscal year ended June 30, 2016. These financial statements are prepared and presented in conformity with generally accepted accounting principles in the United States (GAAP) as prescribed in pronouncements of the Governmental Accounting Standards Board (GASB). To the best of our knowledge and belief, this report is accurate in all material respects and is reported in a manner designed to present fairly the financial position and results of the operations of the various funds of the City. Disclosures necessary to enable the reader to gain an understanding of the City's financial activities have been included.

Management assumes full responsibility for the completeness and reliability of the information presented in this report based on internal controls established for this purpose. To provide a reasonable basis for making these representations, the City has established a framework of internal control that is designed to protect the City's assets from loss, theft or misuse and to compile sufficient reliable information for the preparation of the basic financial statements in conformity with GAAP. Because the cost of internal controls should not outweigh their anticipated benefits, the objective is to provide reasonable rather than absolute assurance that the financial statements are free of any material misstatements.

CliftonLarsonAllen LLP, a firm of licensed certified public accountants, has audited the City of Surprise's financial statements pursuant to A.R.S § 9-481. The audit is intended to provide reasonable assurance that the financial statements of the City for the fiscal year ended June 30, 2016, are free of material misstatement. The independent audit involved examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements, assessing the accounting principles used and significant estimates made by management, and evaluating the overall financial statement presentation.

An unmodified audit opinion denotes that the financial statements are presented fairly and in conformity with GAAP. The independent auditor concluded, based upon the audit, that there was a reasonable basis for rendering an unmodified opinion that the City's financial statements for the fiscal year ended June 30, 2016, are fairly presented in conformity with GAAP. The independent auditor's report is presented as the first component of the financial section of this report.

The City is also required to undergo an annual single audit in conformity with the provisions of the Uniform Grant Guidance. CliftonLarsonAllen LLP was also contracted to perform the single audit of the City's major grant programs. This audit was designed to meet the requirements of the Uniform Grant Guidance. The single audit report is issued separately from this CAFR. Copies are available online and upon request from the City's Finance Department.

Management's discussion and analysis (MD&A) immediately follows the independent auditor's report and provides a narrative introduction, overview, and analysis of the basic financial statements. MD&A complements this letter of transmittal and should be read in conjunction with it.

City Profile

Surprise, located just 45 minutes west of downtown Phoenix along U.S. Route 60/State Highway 93, was founded on May 17, 1938 by Flora Mae Statler who purchased and subdivided the original town site. The former small farming village now encompasses 108 square miles, including urban and commercial developments, ranches, industrial sites, and business parks. Surprise has grown from 500 residents to a city of over 118,000 people, evolving from a small town government to a regional governmental entity.

Surprise operates under the Council/Manager form of government. Policymaking and legislative authority are vested in a governing council consisting of the Mayor and six other members. The Council is responsible, among other things, for passing ordinances, appointing committees, adopting the budget, and appointing the City Manager, the City Clerk, and the Presiding Judge. The City Manager is responsible for carrying out the policies and ordinances of the Council, for overseeing the day-to-day operations of the City, and for appointing department directors.

The Council is elected on a non-partisan basis. Council members serve four-year staggered terms, with three elected alternately every two years. The Mayor is elected at large every four years, while the other Council members are elected by district.

The City of Surprise provides a full range of services, including police and fire protection, roadway maintenance and construction, recreational and cultural activities, as well as general administrative services. Sanitation, water, and sewer services are provided to many of the residents through the City's enterprise funds. The City provides street lighting for developing areas through legally formed street lighting districts. The City provides and accounts for a legally separate volunteer firefighters' pension fund as mandated by Arizona Revised Statute, Title 9, as well as a non-profit corporation formed under Arizona Revised Statute, Title 10, designed to facilitate the acquisition and improvement of City property, and a community facilities district designed to provide funding for the construction and acquisition of certain public infrastructure improvements. These last four activities essentially function as departments within the City and have been included as an integral part of the City's financial statements. Additional information on all four of these legally separate entities can be found in Note 1 section A. (1.A) in the Notes to the Financial Statements.

The annual budget is adopted by resolution and serves as the foundation for the City of Surprise's financial planning and control. The maximum legal expenditure permitted for the fiscal year is the total budget as adopted. The budget preparation and adoption process is described in greater detail in the Notes to the Financial Statements. The budget is prepared by fund and by department within the general fund. The budget may be amended during the fiscal year as follows: Department Directors may make transfers of appropriations within a department between the major categories of supplies and services and within the personnel category. The City Manager may authorize transfers from the personnel category and from operating capital to services or supplies within a department. The Council must approve all transfers from contingency dollars, between funds, between departments and between projects.

Economic Condition and Outlook

The information presented in the financial statements is perhaps best understood when it is considered from the broader perspective of the environment within which the City of Surprise operates.

Local Economy

Forecasts show continued improvement in the economic outlook for the City of Surprise. Key indicators supporting the forecasts include growth in both residential population and commercial square footage that result in increased revenues for the City as well as low inflation rates that keep expenditure increases at a manageable level. Residential population growth in the City has exceeded the statewide average over the last five years and is expected to continue based on the availability of land within the City's planning area. This results in a greater number of consumers and a larger proportion of state shared revenues. The increase in commercial square footage allows for a greater capture of potential sales tax revenues from the increased consumer base. These have combined to result in an 11.2% increase in sales tax collections from the previous year. While state shared revenues increased by 2.3% over the previous year, the growth next fiscal year will be greater when the recent mid-decade census results in a greater proportion of those revenues for the City. In addition, the inflation rate has been held in check with the Phoenix-Mesa Consumer Price Index averaging 1.3% annually over the last five years. This shows prices have remained flat over the last five years assisting the local economy by increasing the purchasing power of residents. The population and commercial square footage growth combined with low inflation rates translates into better economic performance for the City.

Further information on the history of City revenues can be found in the MD&A, pages 14 through 27, and the statistical section that begins on page 143, of this financial report.

Long-Term Financial Planning

With the fund balances exceeding reserve targets, the City now looks to increase investment in the maintenance of facilities, infrastructure, and equipment that allow for the continued delivery of high quality services to the residents of Surprise. The City will dedicate \$20 million in the upcoming fiscal year for this purpose. The City also focuses on maintaining an operating surplus, where ongoing revenues exceed ongoing expenses. This allows the City to offer services that can be sustained in future years. Over the next five years, the City is projecting revenues to be in-line with expenditures. The City continues to build its financial strength and concentrate on critical services and major projects.

Awards and Acknowledgements

The Government Finance Officers Association of the United States and Canada (GFOA) awarded a Certificate of Achievement for Excellence in Financial Reporting to the City of Surprise for its comprehensive annual financial report (CAFR) for the fiscal year ended June 30, 2015. In order to be awarded this certificate, the government must publish an easily readable and efficiently organized CAFR. This report must satisfy both generally accepted accounting principles and applicable legal requirements. A certificate is valid for a period of one year only. We believe that our current CAFR continues to meet the program's requirements and we are submitting it to the GFOA to determine its eligibility for another certificate.

Acknowledgements

I want to thank and recognize the staff of the Finance Department for their efforts in preparing this report. I would like to thank all City departments for their assistance throughout the past year. I also appreciate the guidance and support extended by the City Manager and the Mayor and City Council in planning and conducting the financial operations of the City in a fiscally responsible manner.

Respectfully submitted,

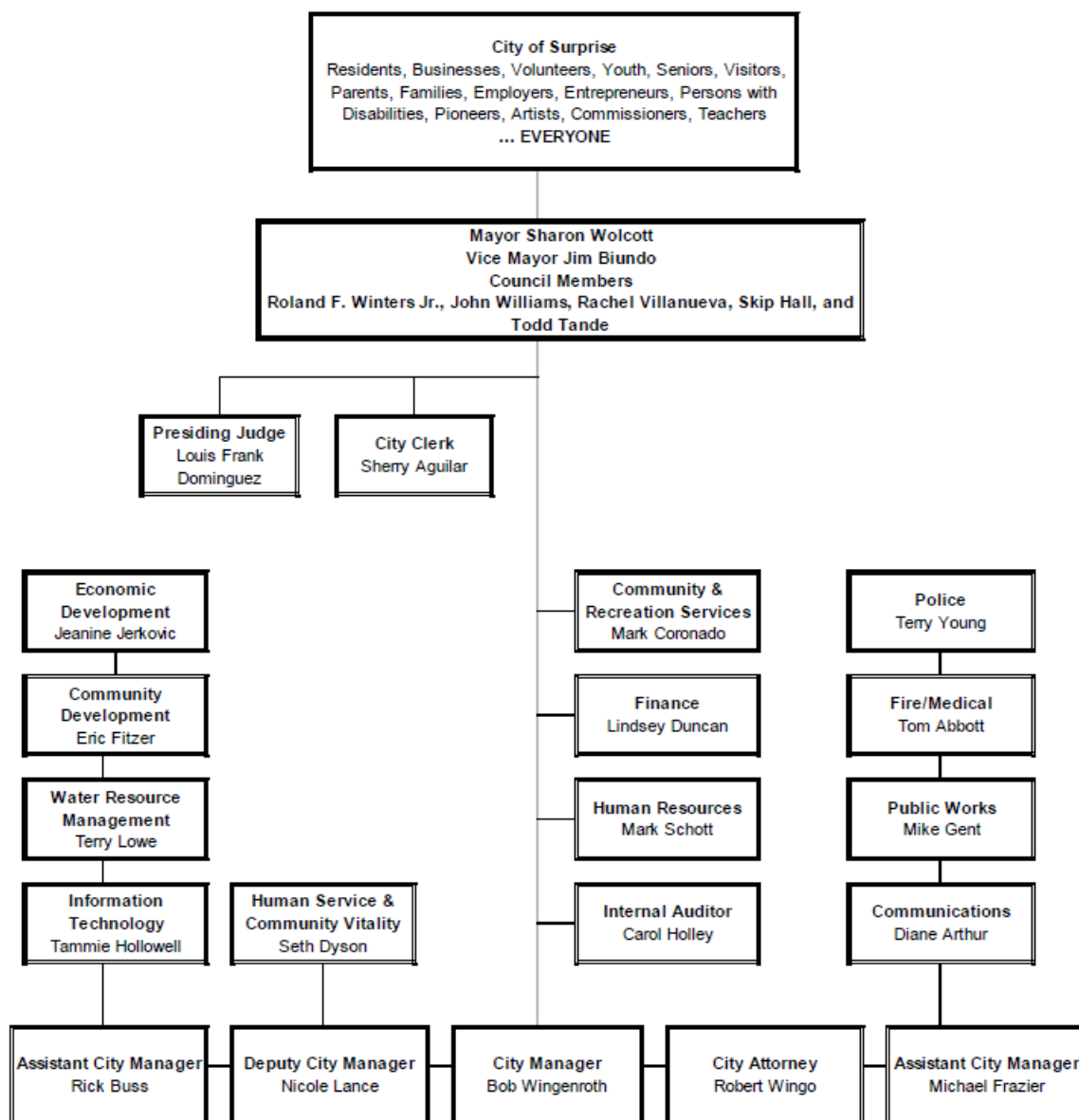


Lindsey Duncan
Chief Financial Officer



City of Surprise

CITYWIDE ORGANIZATION CHART





MAYOR AND CITY COUNCIL MEMBERS

MAYOR SHARON WOLCOTT – Mayor@surpriseaz.gov



Sharon Wolcott serves as the Mayor of the City of Surprise, a city of more than 127,000 residents. She was first elected as Mayor in November of 2011 and re-elected in August of 2016. Prior to her service as Mayor, Wolcott was a member of the Surprise City Council. Throughout her time as an elected leader in Surprise, Wolcott has been a champion for fiscal accountability and transparency in municipal government and setting a course for Surprise's long-term economic success.

Demanding Fiscal Responsibility and Accountability: Under Wolcott's leadership, Surprise has made a major turnaround to fiscal stability, adopting new financial policies, ordering sweeping reviews of financial records, and cutting budgets to address serious shortfalls without raising taxes. Essential services were not affected and the City's bond ratings were re-established. The current FY2017 annual budget protects public safety by adding police officers, firefighters and other related personnel to meet the needs of our growing community and keeping response times low.

Attracting Jobs and Economic Opportunities: Since Wolcott has taken office, the City of Surprise has contributed nearly \$50 million in sales and use taxes to the state's economy. In all, more than 300 new businesses and more than 1,000 jobs were added. Wolcott worked with Luke Air Force base and the City of Phoenix to release our city center property from the deed restrictions that have hampered landowners from developing downtown. The AZ TechCelerator, the city's business incubator, has 16 client start-ups, two onsite service providers, a track record of over 200 jobs graduated, and the only Google corporate office presence in the State of Arizona. In addition, Mayor Wolcott fought hard to gain Federal approval of a Foreign Trade Zone, which is helping Surprise attract exciting new businesses such as IRIS USA, Rioglass Solar and Gestamp Solar Steel.

Supporting Quality Education: Wolcott recently announced the new West-MEC career and technical education campus to open in Surprise this year offering jobs and career training for students and adults. In addition, she spearheaded the implementation of the *Rachel's Challenge* anti-bullying initiative in local schools, and is active with the innovative Arizona Charter Academy. The Mayor encourages development of youth leadership initiatives to include involvement with the City Council and summer employment at the city. She is sharply focused on securing a four-year liberal arts university in Surprise.

Improving Transportation: Mayor Wolcott is a strong advocate for a broad transportation vision on the state and national level advocating for increased connectivity and multimodal options. She is a strong supporter of building the I-11 - a congressionally authorized freeway linking Phoenix and Las Vegas and recognizing its vast economic potential for the West Valley. She's also taken on a leadership role on efforts to redevelop Grand Avenue by involving regional leaders from all communities along its length.

Protecting Surprise's Quality of Life: As a regional leader, Mayor Wolcott stands up to advocate for the interests of Surprise at our nation's capital, the State Legislature, and among her colleagues around the Valley. She has led the way to improve transparency through regularly held community meetings, an increased and active web presence, and social media tools. Wolcott continues to support the arts to help fuel community and economic development. Most recently, she was instrumental in bringing ARTS HQ, a 2,500-square-foot art museum and performance space operated by the West Valley Arts Council to the Surprise Civic Center in July 2014. In 2016, she supported a council initiative to create a one-and-one-third percent arts funding mechanism on all future capital improvement projects built in Surprise.

Mayor Wolcott is active in many regional organizations representing Surprise. She serves on the Arizona League of Cities & Towns Executive Committee, Greater Phoenix Economic Council Board of Directors, I-11 Coalition Board of Directors, Maricopa Association of Governments- Regional Council; Economic Development Committee; and Transportation Committee, and Westmarc Executive Committee & Board of Directors.

Mayor Wolcott has more than 25 years of experience in three states as an elected official, serving at both the state and local levels. As a mother of two and a grandmother of three, she brings a well-balanced perspective to her passion for public service and for making Surprise a great place to live and work.



JIM BIUNDO – Jim.Biundo@surpriseaz.gov



Jim Biundo was appointed District 2 Councilmember on January 28, 2014, to fill a vacancy. He has been a resident of Surprise since 2003.

Jim was first appointed to the City Council's District 1 on June 14, 2011, to fill a vacancy and he served as Vice Mayor in 2013. His appointment to the District 1 seat expired December 31, 2013. Redistricting places Jim within the new District 2 boundaries.

Jim served in the United States Marine Corps from 1954 to 1957. Following military service, he attended college in Colorado and received Bachelor of Arts and Master of Arts degrees in English, Speech, and Theatre and continued studies in a post-graduate doctoral graduate program.

Jim has had a career in education as a high school teacher, associate professor, and administrator at colleges in Colorado, Iowa, Arizona, and Missouri. During that time, he also pursued a parallel track in public service. He has served as a Councilmember at-large and has been on boards of directors of chambers of commerce, convention and visitors' bureaus, civic/service organizations, and was on the Board of Directors of Brucemore, Inc., and a National Trust for Historic Preservation property located in Cedar Rapids, Iowa.

Jim is the author of two books, several published poems, and over thirty published articles. He has made over forty presentations at regional, national, and international conferences. He retired in 2000 from Southeast Missouri State University where he served as Assistant to the President.

Jim and his wife Antoinette have three daughters: Terrilee Day in Del Norte, Colorado; Kimberly Peets in Las Vegas, Nevada; and Tammy Gerstner in Lee's Summit, Missouri. They also have four grandchildren.

'Councilmember Biundo's current term expires December 31, 2016.

ROLAND WINTERS – Roland.Winters@surpriseaz.gov



Roland F. Winters Jr. was elected in the newly-configured District 1 (Acacia) on August 27, 2013 and is serving a five-year term which began January 1, 2014.

Born and educated through high school in New Jersey, Roland earned a degree in Business Administration and Pre Law at Fullerton College in Fullerton, Ca. He earned a BA degree in Marketing Management from the University of California.

He worked thirty five years at Hughes Air Craft Company in Fullerton, Ca. and also owned and operated a photo studio in Fullerton and Placentia, Ca. He served on the State Board of Directors for Californians for Disability Rights (CDR).

Roland and his wife Carroll have four children – two sons and two daughters. David lives in Muncie, Indiana; Donald lives in Wildwood, Florida; Nancy lives in Gilbert, Arizona; and Jennifer lives at home. Roland and Carroll have seven grandchildren.

Winters currently serves as chair of the Boards and Commissions Selection Committee and serves on the Internal Audit Committee. In addition, he serves on the Northwest Valley Connect Advisory Board.

Winters' goal for Surprise is to be a fully self-sustaining city where its residents can live, get educated, work and play.



JOHN WILLIAMS – John.Williams@surpriseaz.gov



John Williams has lived in Surprise for 16 years and is very proud to call Surprise home. A native to New York, John has Bachelor's degree in Athletic Training from Hofstra University, a Master's Degree in Health Administration from Towson University, and a Masters in Educational Leadership from Grand Canyon University. His professional career began in sports medicine, where he worked as an athletic trainer for the New York Islanders, Johns Hopkins University in Baltimore, and as Head Athletic Trainer and Strength and Conditioning Coach for the New Mexico Scorpions Hockey Club before moving to Surprise. He transitioned into education upon his arrival to Surprise and spent the last 13 years helping build the Peoria Unified School District's Career and Technical Education Sports Medicine Program. He now serves as an Assistant Principal with Dysart Unified School District.

John was elected to the City Council from District 3 (Mesquite) in November 2007. He was elected Vice Mayor by the City Council in 2012 and again in 2015. John has served on several municipal, regional and federal committees during his tenure on the Council and has partnered with several neighboring City Council Members and State legislators who share similar passions. He currently serves on the Committee on Community Outreach, Partnerships and Grants as well as the Performance Evaluation Leaders Subcommittee. Some of his previous committee engagements have included Impact Ed, an education stakeholders committee, and the critical Water Resource Planning Committee. John has been a part of the WESTMARC Education & Workforce Development Committee and has served on the National League of Cities Human Services Committee. John's leadership and passion also puts a strong emphasis on youth, veterans, community engagement, job creation, partnerships, education and developing a four-year university.

As a teacher, parent and husband, John brings a community perspective to his commitment to serve as the voice for all residents. "Surprise is not just a suburb of Phoenix or a bedroom community at the far reaching corners of the northwest valley. Surprise is a place that offers opportunities for families to live, grow and help build this great city. In District 3, our streets are new, our housing is new, our schools are new, and they all set a stage for limitless potential for this young and growing community. Melissa and I are so thankful for the opportunities Surprise has afforded us, and we look forward to being a part of this community for years to come."

John is an avid runner and trains at a local CrossFit gym in Surprise. He and Melissa have three children, Connor, Ashlyn and Matthew.

RACHEL VILLANUEVA – Rachel.Villanueva@surpriseaz.gov



The Surprise City Council unanimously voted to appoint Rachel Villanueva as the District 4 City Council member at its August 20, 2013 meeting. Villanueva fills the seat left vacant by the death of her husband, City Council member and former Mayor Roy Villanueva. She has been a Surprise resident for nearly 40 years. Rachel retired following a 30 year career with Honeywell.

Rachel has accomplished many things including conducting monthly open meetings for District 4 on the third Wednesday of each month and in creating the Fiestas Patrias at Gaines Park, a long-running festival recognizing Mexican Independence Day formerly held in the OTS and the Surprise Fiesta Grande.

She single-handedly initiated the first ever West Valley Council Mixer as a way to network with fellow West Valley Councilmembers and to learn what each is doing. This collaborative initiative has seen much success and continues today. In addition, she helped facilitate the attraction and agreement that is bringing the WESTMEC Campus to her District.

She serves as the chair of the Committee on Community Outreach, Partnerships and Grants and as a member on the Committee on Boards & Commissions. She previously served as the chair of the OTS Stakeholders Group, a member on the I Heart Grand Subcommittee, the Youth Master Plan City Council Working Group and the Performance Evaluation Leaders Subcommittee.



Amongst many of her passions, Councilwoman Villanueva is a strong supporter of local businesses, youth, education, public safety, resources for those less privileged and the AZ TechCelerator which is located in District 4.

Rachel served on the Dysart Unified School District Board of Directors for ten years.

In her free time, she enjoys spending time with her children and grandchildren.

VICE MAYOR SKIP HALL – Skip.Hall@surpriseaz.gov



Prior to serving in politics and serving three years on the Planning and Zoning Commission, Skip spent several decades working in various capacities in the Hospitality and Real Estate Industries. For three years, he was the Vice President of a new home builder and prior to that, he served as the Senior Vice President of a hospitality company based in Japan for ten years. Most of his professional career was spent opening and operating several restaurants and hotels along the west coast.

Councilman Hall was elected to the City Council in an April 2008 special election in District 6 (Palo Verde) and re-elected to office in 2009 to a full term. Redistricting placed him in the newly configured District 5, and on August 27, 2013, he was elected to the District 5 seat. He was sworn in on January 1, 2014 to a four-year term and elected Vice Mayor by the City Council on January 14, 2014.

He also served as Vice Mayor in 2011 and again in 2014. He has been part of the united Council effort that helped pull Surprise back to fiscal health over the last several years, generating a budget surplus and placing the City's fiscal house in order. Councilman Hall also played a proactive supporting role with initiating a Surprise youth component and co-sponsors the Surprise Literacy Challenge annually.

His goals for the city include a 100-year water plan, working with transportation partners to expand east-west connections, developing a local circulator, expanding youth involvement in the community, increasing local veteran outreach and services and attracting new businesses to Surprise.

He has served on the Mayor's Business Roundtable Committee, the Form Based Code Sub-Committee, the Boards & Commissions Committee, WESTMARC's Water & Energy Committee and he chaired the Water Planning Sub-Committee. He currently serves as a member of the City's Audit Committee and the Committee on Boards & Commissions.

Councilman Hall is active with the City's Tourism Commission and in promoting the City to local, regional and national organizations. Furthermore, he is active with the Surprise Regional Chamber of Commerce and the AZ TechCelerator to promote business growth. He serves on the Valley Metro RPTA Board of Directors, MIKID Board of Directors, the Surprise Rotary Club and the Surprise Fraternal Order of Eagles. In addition, Councilman Hall is a member of the STEM Community of Practice with representatives of the Dysart Unified School District and the West Valley Veterans Success Project (VCP) Advisory Committee with several other State and local elected officials. He has also regularly volunteered his time with Radiant Church.

He grew up in Idaho and received a business degree from Seattle University. Skip is a Vietnam War Veteran and was awarded the Bronze Star for his outstanding service 1969-1970.



TODD TANDE – Todd.Tande@surpriseaz.gov



Todd Tande was elected to the newly-configured District 6 (Palo Verde) on August 27, 2013 to an extended five-year term beginning January 1, 2014.

Council Member Todd Tande also serves on the Board of Directors and as Sr. Executive Vice President, and co-founder of Education Connection Solutions, LLC., a management consulting firm with International clientele. Todd also is serving as Vice Chairman of Board of Directors for the Navajo Mission and School in Rock Point, Arizona. As part of his City Council duties, Todd currently serves as a member of the Maricopa Association of Governments (MAG) Human Services and Community Initiatives Committee. He received his Bachelor of Science degree in

Management and his MBA from California State Polytechnic University, Pomona, California.

Todd spent his early career in the private sector with many years in the theme park (Disney and Knott's) and Aerospace and Defense (Rockwell International, Hughes Aircraft, Raytheon) industries including in Project Management for the Global Positioning Satellite (GPS) Production Program and after some promotions, he directly supported top corporate management of a Fortune 27 company with financial analysis and SEC reporting including work on International Mergers and Acquisitions. Todd is also a licensed Realtor, in the Coldwell Banker Residential Brokerage Sun City Grand Surprise Office.

In addition to serving as a Surprise City Council Member, Todd has significant experience in public service in California and Indiana. He served in a Budget and Policy Management role in the County Executive Office for Orange County, California where he was hired to help resolve the County multi-billion-dollar bankruptcy. As part of the initial recovery efforts, Todd wrote the minute order (local law), unanimously adopted by the Board of Supervisors, to set up a Treasurer's Oversight Committee consisting of top financial experts from the private sector investment community. Todd also coordinated restructuring of major agency budgets, and prepared the recovery briefing charts with information presented to Wall Street and Sacramento during successful recovery efforts.

Todd later served as Chief Financial Officer for Indianapolis-Marion County DPS where his ideas and efforts led to many improvements and changes in federal and state policies. Todd then was asked to join the State of Indiana government as the Deputy Director serving in the Chief Operating Officer role for one of the largest State Agencies. He was tasked with achieving a successful operational and financial turnaround for the Indiana Department of Natural Resources, which included over 20 operating divisions and over 4,000 employees during peak seasons. Todd was then promoted and completed his Indiana public service in the State Capitol as Finance Director responsible for statewide finances at a time when the state achieved its first ever AAA credit rating.

Todd has served in many volunteer roles including as a Council Member and Treasurer of his churches in California and Arizona, as well as being chosen as a voting delegate to represent the church at organizational conferences. Todd also founded and led the local Surprise, Arizona C3G Group providing free services to job seekers.

Todd has served his political party in Arizona, Indiana, and California, in roles such as Precinct Committeeman, State Delegate, Candidate Volunteer Team Member, Campaign Manager, and as an advisor for newly elected candidates on their transition teams. Todd also has served as a volunteer Docent Leader and Chair of the Ways and Means Committee at the Nixon Presidential Library and Birthplace Museum in Yorba Linda, California. Todd is an Eagle Scout from historic Troop 99 in Yorba Linda California, and he also received the title of "Honored Citizen" for Orange County, California from the Board of Supervisors.

Todd and his wife Blossom have been married since 1980 and they have two children and one grandchild who call Surprise home. Todd's parents, Paul and Lois Tande, live in Sun City Grand – making it four generations of Tande's in Surprise.



City of Surprise

Appointed Officials

City Manager

Bob Wingenroth

City Clerk

Sherry Aguilar

City Attorney

Robert Wingo

Presiding Judge

Louis Frank Dominguez



Government Finance Officers Association

**Certificate of
Achievement
for Excellence
in Financial
Reporting**

Presented to

**City of Surprise
Arizona**

For its Comprehensive Annual
Financial Report
for the Fiscal Year Ended

June 30, 2015

A handwritten signature in black ink, reading "Jeffrey R. Emen". The signature is written in a cursive, flowing style.

Executive Director/CEO



SURPRISE
ARIZONA



FINANCIAL SECTION – INDEPENDENT AUDITORS’ REPORT

The Financial Section is divided into five subsections. The first subsection is the Independent auditors’ report, which is the official written communication of the audit results provided by the independent auditors expressing their opinion on the City’s financial statements as to whether the financial statements are fairly presented in conformity with Generally Accepted Accounting Principles (GAAP).

Financial Subsection’s

- Independent Auditors’ Report
- Management’s Discussion and Analysis
- Government Wide Financial Statements
- Fund Financial Statements
- Notes to the Financial Statements



CliftonLarsonAllen LLP
CLAconnect.com

INDEPENDENT AUDITORS' REPORT

The Honorable Mayor and the City Council of the
City of Surprise, Arizona

Report on the Financial Statements

We have audited the accompanying financial statements of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the City of Surprise, Arizona, as of and for the year ended June 30, 2016, and the related notes to the financial statements, which collectively comprise the City's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the City's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the City's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the City of Surprise, Arizona as of June 30, 2016, and the respective changes in financial position and, where applicable, cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, the pension schedules, the OPEB plans' funding progress and budgetary comparison information as listed on the table of contents be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Supplementary and Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the City of Surprise's basic financial statements. The combining and individual fund financial statements and schedules and the introductory and statistical sections are presented for purposes of additional analysis and are not a required part of the basic financial statements.

The combining and individual fund financial statements and schedules are the responsibility of management and were derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the combining and individual fund financial statements and schedules are fairly stated, in all material respects, in relation to the basic financial statements as a whole.

The introductory and statistical sections have not been subjected to the auditing procedures applied in the audit of the basic financial statements, and accordingly, we do not express an opinion or provide any assurance on it.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated December 19, 2016, on our consideration of the City of Surprise, Arizona's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the result of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the City of Surprise Arizona's internal control over financial reporting and compliance.



CliftonLarsonAllen LLP

Phoenix, Arizona
December 19, 2016



SURPRISE

ARIZONA



FINANCIAL SECTION – MANAGEMENT’S DISCUSSION AND ANALYSIS

The Financial Section is divided into five subsections. The second subsection is Management’s Discussion and Analysis. This component of required supplementary information is used to introduce the basic financial statements and provide an analytical overview of the City’s financial activities.

MANAGEMENT'S DISCUSSION AND ANALYSIS

The City of Surprise (City) is pleased to provide an overview of our financial activities for the fiscal year ended June 30, 2016. The intended purpose of Management's Discussion and Analysis (MD&A) is to provide an introduction to the basic financial statements and notes, that provides an objective and easy to read analysis of our financial activities based on currently known facts, decisions, and conditions, by providing a summary of operating results and reasons for changes, which will help to determine if our financial position improved or deteriorated over the past year. This report addresses current operational activities, the sources, uses, and changes in resources, adherence to budget, service levels, limitations, significant economic factors, and the status of infrastructure and its impacts on our debt and operation. Amounts presented may reflect some minor differences due to rounding. This analysis is meant to be read in conjunction with the letter of transmittal.

FINANCIAL HIGHLIGHTS

- ❖ **Governmental Type net position.** The City's net position decreased 1.9% or \$7.8 million from \$418.7 million to \$410.9 million. This decrease is a larger decrease than the prior year decrease of \$2.1 million. Increases in full-time equivalent employees, personnel costs, and one-time projects accounted for the decrease in net position.
- ❖ **Business Type net position.** The City's net position decreased by 0.5% or \$1.6 million from \$314.6 million to \$313.0 million, a smaller decrease than the prior year decrease of \$3.9 million. A 3.9% increase in water utility rates and an increase in capital grants and contributions from development, a bond refinancing in 2015 reduced interest expense and a decrease in developer reimbursements account for the change.
- ❖ **Governmental Activities expenses** of \$142.4 million exceeded program revenues of \$40.9 million, a difference of \$101.5 million. The remaining \$101.5 million of expense represents the total burden each separate function places on the City, that is the total cost after deducting revenues charged or grants and contributions received specifically for these programs. This amount is covered by general governmental revenues net of transfers.
- ❖ **Business Type expenses** were \$40.2 million, while program revenues totaled \$38.5 million, a difference of \$1.7 million. For the business type activities for the current year this deficit will be covered by the unrestricted net position.
- ❖ **Component units** – The City includes three separate legal entities in its report: the Surprise Municipal Property Corporation (SMPC), Marley Park Community Facilities District (CFD), and various Street Lighting Improvement Districts (SLID). Although legally separate, these “component units” are presented along with the City's financial statements (blended presentation). Blending component units is appropriate when they share a governing body with the primary government or when there is an exclusive benefit to the primary government. Each of the above mentioned component units, meets these requirements. A more detailed description of these component units is available in Note 1.

OVERVIEW OF THE FINANCIAL STATEMENTS

This annual report consists of a series of financial statements. The statement of net position and the statement of activities (on pages 28 and 29-30) provide information about the activities of the City as a whole and present a longer-term view of the City's finances. Fund financial statements start on page 31. For governmental activities, these statements tell how these services were financed in the short term as well as what remains for future spending. Fund financial statements also report the City's operations in more detail than the government-wide statements by providing information about the City's most significant funds. The fiduciary statements provide financial information about activities for which the City acts solely as a trustee or agent for the benefit of those outside of the government.

Reporting the City as a Whole

Our analysis of the City as a whole begins on page 28. One of the most important questions asked about the City's finances is, "Is the City as a whole better off or worse off as a result of the year's activities?" The statement of net position and the statement of activities provide information about the City as a whole and about its activities in a way that helps answer this question. These statements use the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows.

These two statements report the City's net position and/or changes in them. You can think of the City's net position – the difference between assets, deferred outflows of resources, liabilities and deferred inflows of resources – as one way to measure the City's financial health, or financial position. Over time, increases or decreases in the City's net position are one indicator of whether its financial health is improving or deteriorating. You will need to consider other non-financial factors, however, such as changes in the City's property tax base and the condition of the City's roads, to assess the overall health of the City.

The statement of net position and the statement of activities are divided into two kinds of activities:

- ❖ **Governmental activities** – Most of the City's basic services are reported here, including the police, fire, public works, parks and recreation departments, and general administration.
- ❖ **Business type activities** – The City charges a fee to customers to help it cover all or most of the costs of certain services it provides. The City's water, sewer, and sanitation systems are reported here.

Reporting the City's Most Significant Funds

Our analysis of the City's major funds begins on page 31 where the fund financial statements begin. These provide detailed information about the most significant funds, not the City as a whole. Some funds are required to be established by state law and by bond covenants. However, the City Council establishes many other funds to help it control and manage money for particular purposes or to show that it is meeting legal responsibilities for using certain taxes, grants, and other money.

- ❖ **Governmental Funds** – Most of the City's basic services are reported in governmental funds, which focus on how money flows into and out of those funds and the balances left at year end that are available for spending. These funds are reported using an accounting method called modified accrual accounting, which measures cash and all other financial assets that can readily be converted to cash. The governmental fund statements provide a detailed short-term view of the City's general governmental operations and the basic services it provides. Governmental fund information helps you determine whether there are more or fewer financial resources that can be spent in the near future to finance the City's programs. A description of the relationship (or differences) between governmental activities (reported in the statement of net position and the statement of activities) and governmental funds is included in the reconciliations following the fund financial statements.
- ❖ **Proprietary Funds** – When the City charges customers for the services it provides, whether to outside customers or to other units of the City, these services are generally reported in proprietary funds. Proprietary funds are reported in the same way that all activities are reported in the statement of net position and the statement of activities. In fact, the City's enterprise funds (a component of proprietary funds) are the same as the business-type activities reported in the government-wide statements but provide more detail and additional information, such as cash flows, for proprietary funds. The City uses an internal service fund (the other component of proprietary funds) to report activities that provide supplies and services for the City's other programs and activities, specifically the City's Employee Healthcare Fund and the Risk Management Fund.
- ❖ **Fiduciary Funds** – The City is the fiduciary for the Flexible Spending Account. All of the City's fiduciary activities are reported in separate statements of fiduciary net position on pages 42.

These activities are excluded from the City's other financial statements because the City cannot use these assets to finance its operations. The City is responsible for ensuring that the assets reported in these funds are used for their intended purposes.

GOVERNMENT-WIDE FINANCIAL ANALYSIS

The following table reflects the condensed Statement of Net Position as of June 30, 2016 and June 30, 2015.

City of Surprise's Net Position (in Millions)

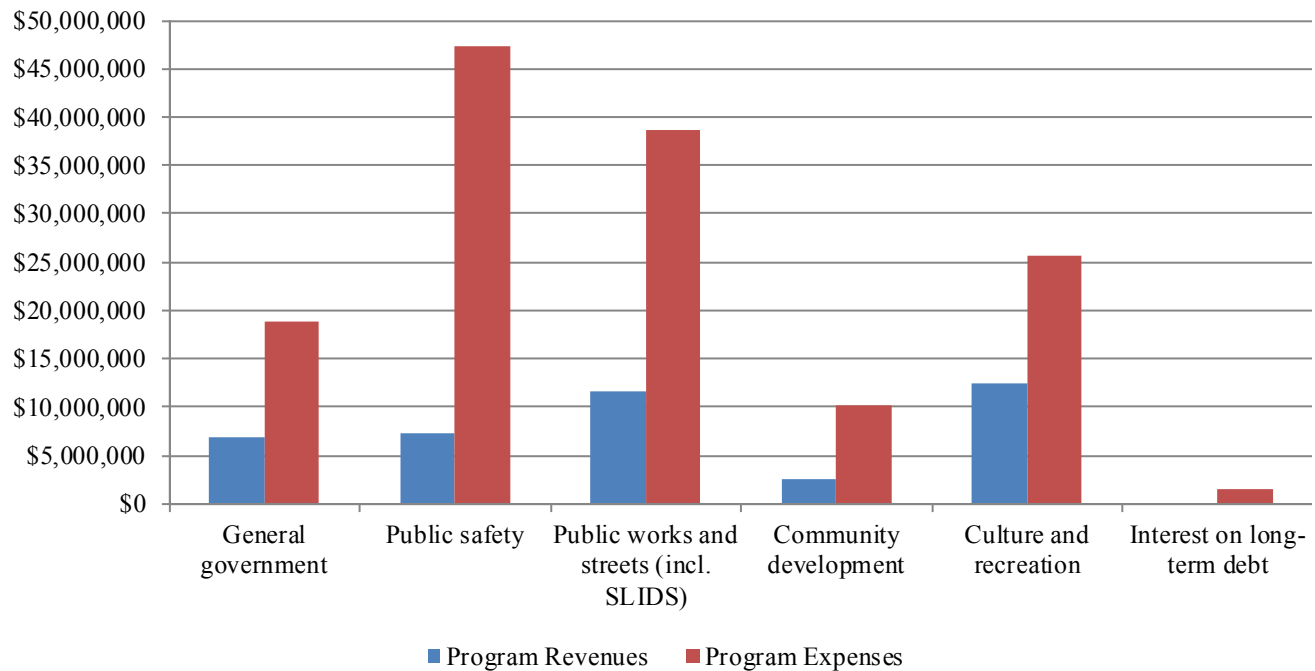
	Governmental Activities		Business-type Activities		Total Primary Government	
	<u>2016</u>	<u>2015</u>	<u>2016</u>	<u>2015</u>	<u>2016</u>	<u>2015</u>
ASSETS						
Current and other assets	\$ 80.4	\$ 97.3	\$ 65.4	\$ 69.1	\$ 145.8	\$ 166.4
Capital assets, net	443.4	431.7	308.3	305.5	751.7	737.2
Total assets	<u>523.8</u>	<u>529.0</u>	<u>373.7</u>	<u>374.6</u>	<u>897.5</u>	<u>903.6</u>
 DEFERRED OUTFLOWS OF RESOURCES	 22.9	 12.8	 1.9	 1.1	 24.8	 13.9
 LIABILITIES						
Other liabilities	79.8	65.5	16.1	12.0	95.9	77.5
Long-term liabilities	50.9	49.6	45.6	47.6	96.5	97.2
Total liabilities	<u>130.7</u>	<u>115.1</u>	<u>61.7</u>	<u>59.6</u>	<u>192.4</u>	<u>174.7</u>
 DEFERRED INFLOWS OF RESOURCES	 5.1	 8.0	 0.9	 1.5	 6.0	 9.5
 Net position:						
Net investment in capital assets	405.1	409.3	270.1	264.7	675.2	674.0
Restricted	22.7	27.9	13.0	5.4	35.7	33.3
Unrestricted	(16.9)	(18.5)	29.9	44.5	13.0	26.0
Total net position	<u>\$ 410.9</u>	<u>\$ 418.7</u>	<u>\$ 313.0</u>	<u>\$ 314.6</u>	<u>\$ 723.9</u>	<u>\$ 733.3</u>

Net position is a good indicator of a city's overall financial standing. For fiscal year 2016, the City had total combined net position of \$723.9 million. This was a decrease of \$9.4 million, or 1.3% over the prior year's net position of \$733.3 million and is attributed to increased personnel costs as a result of adding 22 additional full-time equivalent employees and one-time projects. Not all of the \$723.9 million is available for the City to use without restraint. The largest portion of the City's total net position \$675.2 million, or 93.3% represents the City's net investment in capital assets. Of the remaining net position, \$35.7 million is restricted for various purposes and \$13.0 million is unrestricted.

City of Surprises Changes in Net Position (in Millions)

	Governmental Activities		Business-type Activities		Total Primary Government	
	<u>2016</u>	<u>2015</u>	<u>2016</u>	<u>2015</u>	<u>2016</u>	<u>2015</u>
REVENUES						
Program Revenues:						
Charges for services	\$ 18.1	\$ 16.1	\$ 35.4	\$ 35.7	\$ 53.5	\$ 51.8
Operating grants and contributions	11.2	9.9	-	-	11.2	9.9
Capital grants and contributions	11.6	11.6	3.1	0.1	14.7	11.7
General revenues:						
Property taxes	10.0	9.7	-	-	10.0	9.7
Sales taxes	46.8	42.1	-	-	46.8	42.1
Franchise taxes	5.1	5.2	-	-	5.1	5.2
State shared revenues	30.6	29.9	-	-	30.6	29.9
Unrestricted investment earnings	0.6	0.4	0.3	0.3	0.9	0.7
Other	0.4	1.1	-	-	0.4	1.1
Total revenues	<u>134.4</u>	<u>126.0</u>	<u>38.8</u>	<u>36.1</u>	<u>173.2</u>	<u>162.1</u>
EXPENSES						
Program activities:						
Governmental activities:						
General government	18.9	21.0	-	-	18.9	21.0
Public safety	47.3	44.4	-	-	47.3	44.4
Public works and streets	38.7	35.1	-	-	38.7	35.1
Community development	10.2	5.2	-	-	10.2	5.2
Culture and recreation	25.7	21.9	-	-	25.7	21.9
Interest on long-term debt	1.6	1.6	-	-	1.6	1.6
Business-type activities:						
Water	-	-	11.8	10.6	11.8	10.6
Sewer	-	-	20.4	20.4	20.4	20.4
Sanitation	-	-	8.0	7.9	8.0	7.9
Total expenses	<u>142.4</u>	<u>129.2</u>	<u>40.2</u>	<u>38.9</u>	<u>182.6</u>	<u>168.1</u>
Excess before transfers	<u>(8.0)</u>	<u>(3.2)</u>	<u>(1.4)</u>	<u>(2.8)</u>	<u>(9.4)</u>	<u>(6.0)</u>
Transfers in (out)	<u>0.2</u>	<u>1.1</u>	<u>(0.2)</u>	<u>(1.1)</u>	<u>-</u>	<u>-</u>
Increase/(Decrease) in net position	<u>(7.8)</u>	<u>(2.1)</u>	<u>(1.6)</u>	<u>(3.9)</u>	<u>(9.4)</u>	<u>(6.0)</u>
Net position - beginning	<u>418.7</u>	<u>420.8</u>	<u>314.6</u>	<u>318.5</u>	<u>733.3</u>	<u>739.3</u>
Net position - ending	<u><u>\$ 410.9</u></u>	<u><u>\$ 418.7</u></u>	<u><u>\$ 313.0</u></u>	<u><u>\$ 314.6</u></u>	<u><u>\$ 723.9</u></u>	<u><u>\$ 733.3</u></u>

FY 2016 Governmental Program Revenues and Expenses

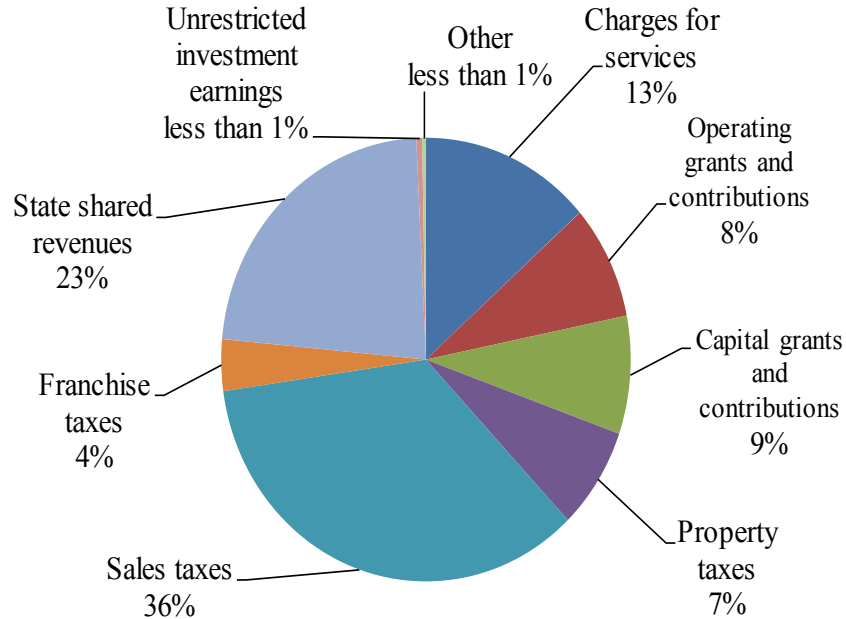


For fiscal year 2016, governmental program expenses exceeded program specific revenues by \$101.5 million. The remaining expenses were supported by general governmental revenues.

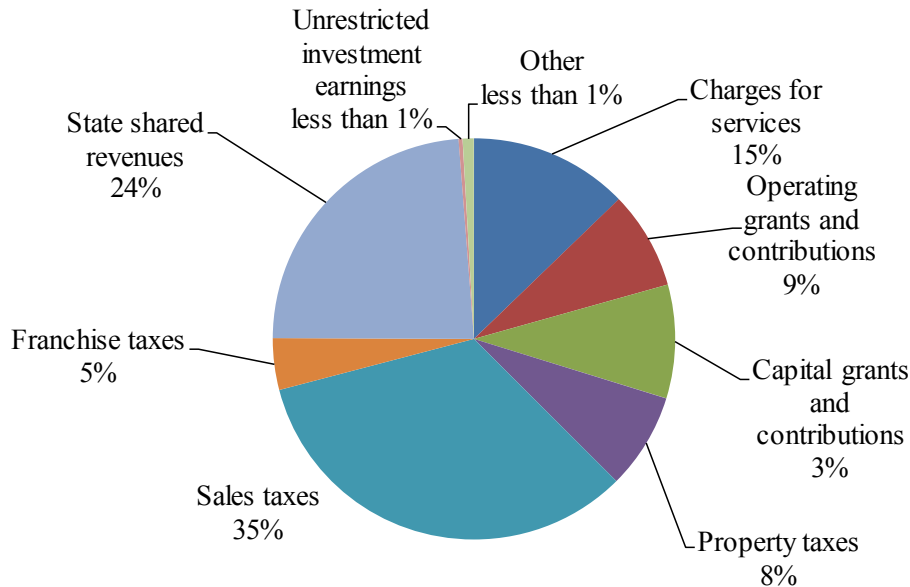
- ❖ Charges for services, operating grants and contributions, and capital grants and contributions account for 30% of total governmental revenues.
- ❖ Community oriented programs such as **Public Safety** (police, fire, and courts) and **Culture and Recreation** (parks, recreation, youth, and senior services) are subsidized by general governmental revenues. The City does not intend to charge for the total cost of these services directly.
 - The City of Surprise maintains a full-time paramedic-trained Fire Department funded by General Government revenues.
 - Culture and Recreation often charges a fee for services it provides, but usually that fee does not cover the entire cost of the service.
- ❖ **Community Development** revenues come primarily from construction related activities.
- ❖ **SLIDS** are Street Light Improvement Districts that charge a fee/tax to pay for the maintenance of light poles and the electricity used by neighborhood streetlights. Revenues and expenses for SLIDS are included in the public works and streets program.

Governmental Activities Revenues for the fiscal year ended June 30, 2016 totaled \$134.4 million and have been identified by major revenue source in percentage format. The prior year percentages have also been provided for comparison.

Fiscal Year 2016 Governmental Activities Revenues

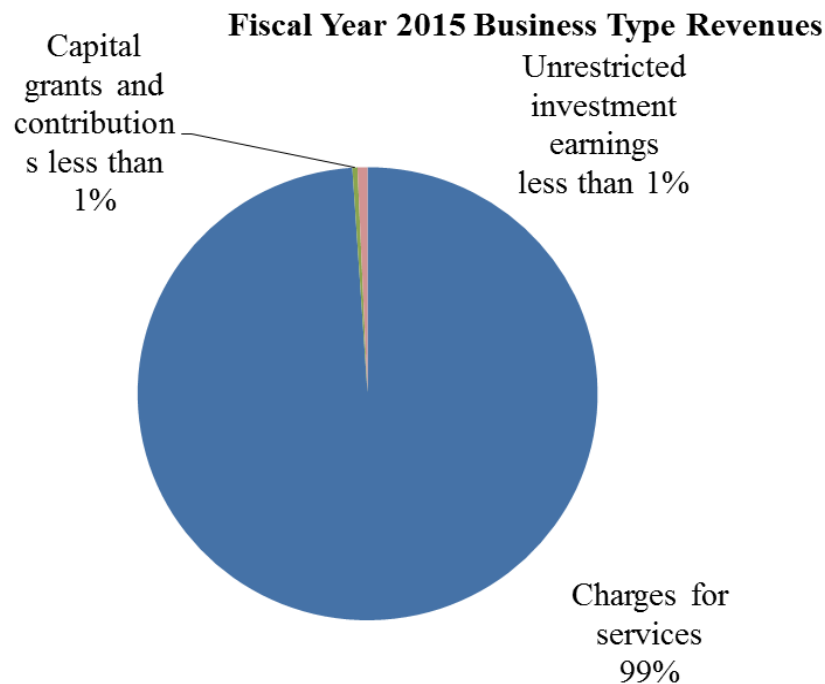
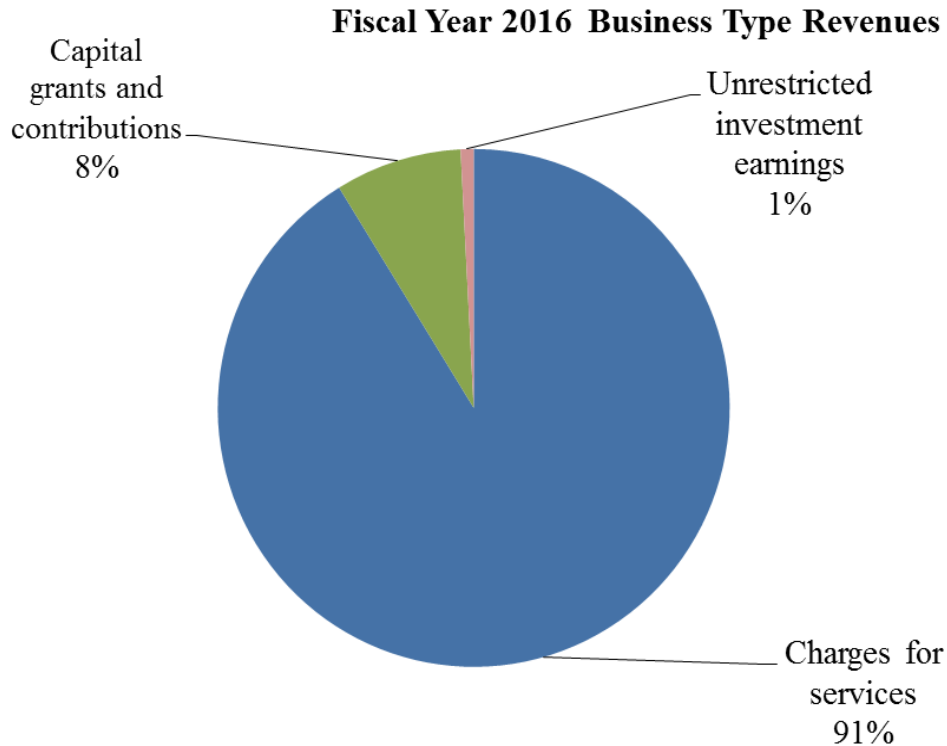


Fiscal Year 2015 Governmental Activities Revenues



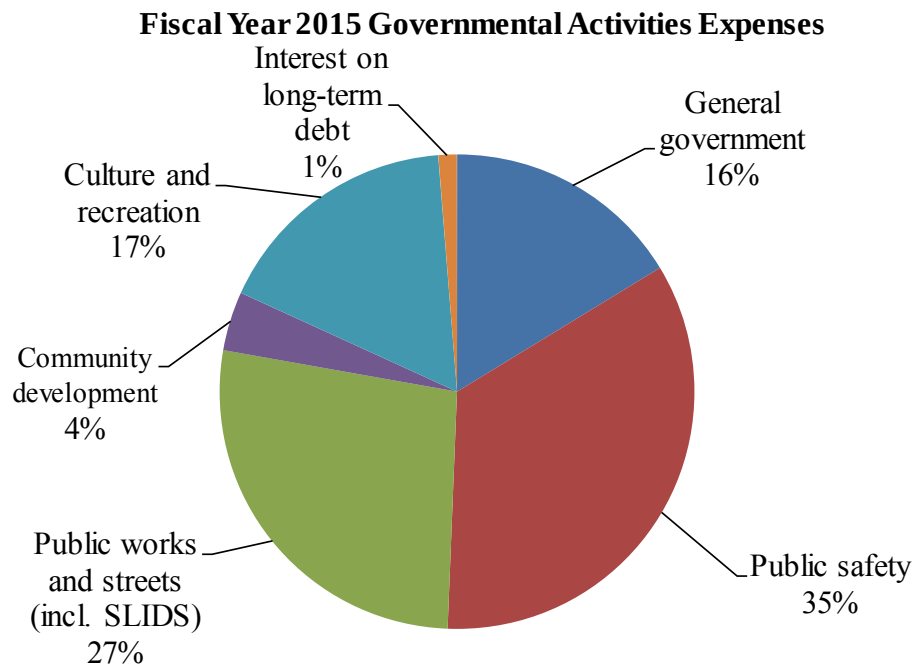
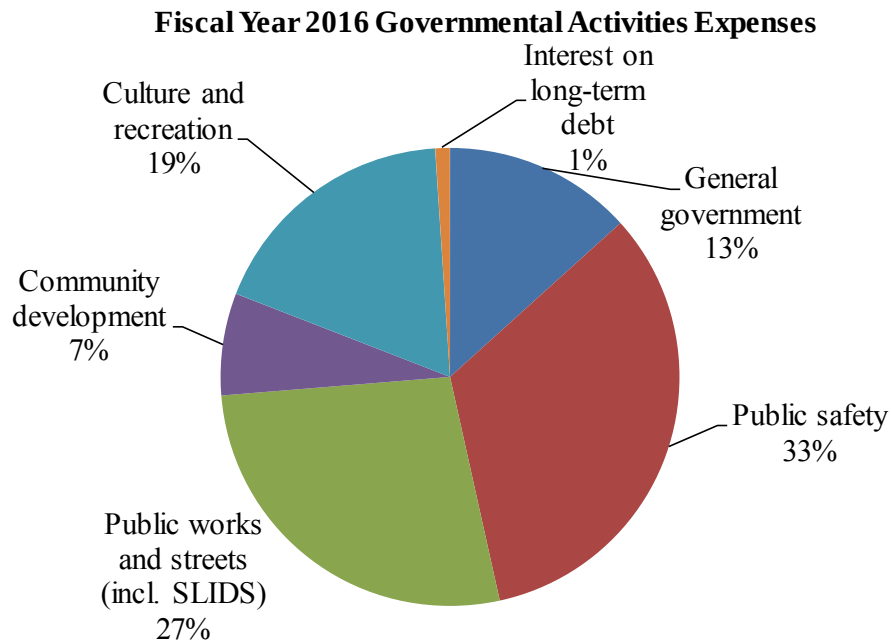
- ❖ The City's largest revenue source is sales taxes at \$46.8 million. This is followed by state shared revenues totaling \$30.6 million.
- ❖ Total governmental activities revenues increased \$8.4 million from the prior year as a result of the following changes in revenue: sales taxes increased \$4.7 million and state shared revenues increased \$0.7 million due to an improving local economy. Charges for services increased \$2 million, operating grants and contributions increased \$1.3 million, and property taxes increased \$0.3 million from a 3.6% increase in property values.

Business Type Revenues for the fiscal year ended June 30, 2016 totaled \$38.8 million are identified by major revenue source in percentage format. The prior year percentages have also been provided for comparison.



- ❖ Total Business Type Revenues increased \$2.7 million from the prior fiscal year. The increase is the result of a 3.9% increase in water utility rates and an increase in capital grants and contributions as a result of increased development activities within the City during the current year.

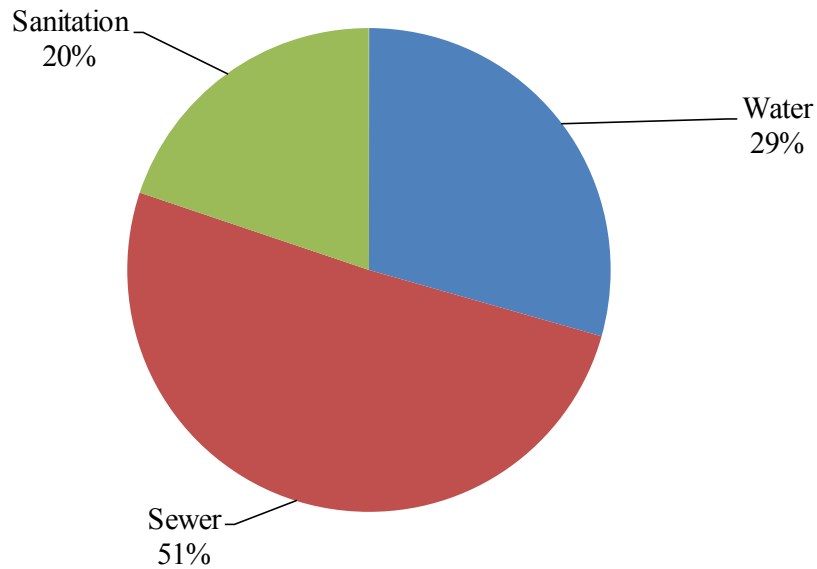
- ❖ **Governmental Activities Expenses** for the fiscal year ended June 30, 2016 totaled \$142.4 million and are identified by function in percentage format. The prior year percentages have also been provided for comparison.



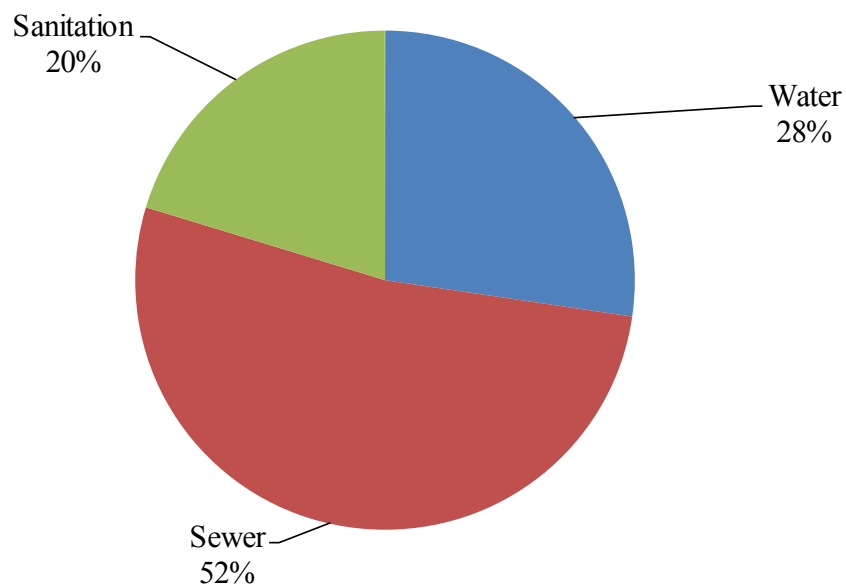
- ❖ Current year costs increased by \$13.2 million or 10.2%. The single largest expense for the City is the cost of personnel. Public safety has the largest workforce paid from governmental funds. As a result, public safety comprises the largest portion of program expenditures at \$47.3 million.

Business Type Expenses for the fiscal year ended June 30, 2016 totaled \$40.2 million and are identified by function in percentage format. The prior year percentages have also been provided for comparison.

Fiscal Year 2016 Business Type Expenses



Fiscal Year 2015 Business Type Expenses



- ❖ Business Type expenses increased by \$1.3 million or 3.3% from the prior year. Personnel increases account for the majority of the increase as a result of adding eight additional full-time equivalent employees.

FINANCIAL ANALYSIS OF THE CITY'S FUNDS

- ❖ **Total Governmental Funds** fund balance decreased \$21.7 million from \$77.4 million to \$55.7 million. The decrease was primarily due to \$18.6 million in unspent bond proceeds from the prior year on the stadium improvements project. The remaining decrease was due to one-time projects in the General Capital Projects and the Highway User Revenue Funds. Of the total ending fund balance, \$1.7 million has been classified as nonspendable and is not available to meet future funding needs because it is not in spendable form or is legally or contractually required to be maintained intact. An additional \$23.1 million has been classified as restricted and consists of amounts restricted by external parties or as a result of the law. Of the remaining total, \$40.2 million has been committed to recognize a specific council determined purpose. These amounts may be used for another purpose with council's direction. There is \$1.0 million of fund balance which has been assigned to a specific purpose by the chief financial officer; these amounts may be used for other than the currently assigned positions if the chief financial officer deems it necessary. Finally, there is an unassigned fund balance of -\$10.3 million. This negative unassigned fund balance is the result of several development fee funds that currently have deficit cash balances. Interfund loans were created to replenish the cash balances in these funds and the future receipt of development fees will be used to repay these interfund loans.
 - The General Fund balance increased \$3.0 million. This change was the result of increases in property taxes, sales taxes, state shared revenues, licenses and permits, intergovernmental revenues, charges for services, rents and interest income.
 - The General Capital Projects Fund balance decreased \$21.5 million. This change was due to spending \$18.6 million in unspent bond proceeds from the prior year on the stadium improvement project. The remaining \$2.9 million decrease is due to expenditures on other projects.
 - The General Government Development Fee Fund contains \$43.1 million in advances from other funds which represents the current cash deficit in the fund. This amount will be reimbursed from future development fees to pay for the growth related capital improvements.
 - The Highway User Revenue Fund balance decreased \$0.4 million from \$2.1 million to \$1.7 million due to increased expenditures related to capital projects and increases in inventories.
 - The Transportation Improvement fund balance increased \$0.4 million from \$3.4 million to \$3.8 million. This increase is the result of an increase in construction sales tax revenue as result of increased development in the City during the year.
 - The Non-major Governmental Funds fund balance decreased \$4.4 million. The decrease was due to transfers out of \$3.6 million from the debt service fund to return cash previously transferred to establish a supplement reserve fund from various funds of the City related to the 2003 bonds that were defeased in 2015. The remaining decrease of \$0.8 million is the result of increased expenditures for projects in the Parks and Recreation Development Fee Fund, Public Works Expansion Development Fee Fund and the Tourism Fund.
- ❖ **Proprietary Fund** financial statements provide similar information contained in the government-wide financial statements but in more detail. Their results are thoroughly discussed in the review of business type activities.

GENERAL FUND BUDGETARY HIGHLIGHTS

- ❖ The original General Fund budget for expenditures was \$102.7 million. Budget adjustments throughout the year decreased total budgeted expenditures by \$2.5 million. Of that decrease, \$2.4 million resulted from the cancellation of a mid-decade census that was not needed due to a change in Arizona law.
- ❖ Actual General Fund expenditures totaling \$92.2 million were \$7.9 million less than budgeted. Of that variance, \$1.2 million of costs budgeted for Park and Recreation within the General Fund were assumed by the Spring Training Ticket Surcharge fund. An additional \$2.0 million of the variance is a result of unused contingency. The remaining variance was spread fairly evenly among all of the City's expenditures and was a result of conservative spending efforts.

CAPITAL ASSET AND DEBT ADMINISTRATION

Capital Assets at Year-End, Net of Depreciation (in Millions)

	Governmental Activities		Business-type Activities		Total	
	2016	2015	2016	2015	2016	2015
Land and improvements	\$ 33.8	\$ 33.6	\$ 5.1	\$ 5.1	\$ 38.9	\$ 38.7
Parks	10.3	10.3	-	-	10.3	10.3
Water rights	-	-	8.6	7.9	8.6	7.9
Construction in progress	10.4	10.0	9.5	0.8	19.9	10.7
Buildings and improvements	146.7	135.5	277.6	286.2	424.3	421.8
Improvements other than buildings	19.2	12.7	1.3	0.8	20.5	13.5
Equipment and vehicles	16.4	11.1	6.4	4.7	22.8	15.8
Infrastructure	206.6	218.5	-	-	206.6	218.5
Total capital assets net	<u>\$ 443.4</u>	<u>\$ 431.7</u>	<u>\$ 308.5</u>	<u>\$ 305.5</u>	<u>\$ 751.9</u>	<u>\$ 737.2</u>

The capital assets of the Governmental Activities increased by \$11.7 million from the prior fiscal year, net of depreciation (\$37.7 million increase before depreciation).

- ❖ Changes to the Governmental Activities capital assets for fiscal year 2016 were the result of:
 - Current year depreciation expense of \$26.0 million.
 - Capital asset donations made to the City. The assets donated consisted of streets infrastructure.
 - \$0.2 million – WINCO Foods
 - \$1.838 million – Marley Park Phase III
- ❖ Governmental Activities construction in process includes:
 - \$1.9 million – Greenway Rd Improvement
 - \$1.8 million – Bell Rd Sidewalks E of Grand
 - \$0.6 million – Dove Valley Pkway 163rd – 179th
 - \$0.3 million – 107th & Union Hills Drainage
 - \$0.3 million – Cactus Rd 175th to Cotton Ln
 - \$2.1 million – Replace Financial Software
 - \$0.6 million – Jomax 147th to 132nd Pave Dirt Rd
 - \$0.5 million– Median & ROW Landscaping
 - \$0.2 million – Elec Svc Upgr at Techcelerator
 - \$0.2 million – Jerry St and Rimrock Drainage
 - \$0.5 million – AZ Techcelerator Renovation
 - \$0.3 million – Fire Pumper Replacement

The capital assets of the Business Type Activities funds increased by \$3.0 million from the prior fiscal year, net of depreciation (\$14.0 million increase before depreciation).

- ❖ Changes to the Business Type Activities capital assets for fiscal year 2016 were the result of:
 - Current year depreciation expense of \$11.0 million.
 - Capital asset infrastructure donations made to the City. The assets donated consisted of water and sewer utilities.
 - \$0.9 million – Marley Park Phase III
- ❖ Business Type Activities construction in process - includes:
 - \$0.6 million – Greenway Rd Improvement
 - \$2.3 million – SPA1 Effluent Strg Reser Covers
 - \$0.2 million – Replace Financial Software
 - \$0.2 million – Dewatering Centrifuge
 - \$1.1 million – Litchfld E SD Cactus/Desert Cv
 - \$4.1 million – SPA1 WRF Conf & Training Center
- ❖ For more detailed information on Capital Assets see Note 4 of this report.

Outstanding Debt at Year-End (in Millions)

	Governmental Activities		Business-type Activities		Total	
	<u>2016</u>	<u>2015</u>	<u>2016</u>	<u>2015</u>	<u>2016</u>	<u>2015</u>
Pledged revenue obligations	\$ 31.7	\$ 34.2	\$ 5.9	\$ 6.5	\$ 37.6	\$ 40.7
Municipal property corporation bonds	-	-	37.6	39.4	37.6	39.4
Community facilities districts bonds	6.9	7.1	-	-	6.9	7.1
Contracts and developer payable	3.0	2.1	0.2	0.4	3.2	2.5
Total debt outstanding	<u>\$ 41.6</u>	<u>\$ 43.4</u>	<u>\$ 43.7</u>	<u>\$ 46.3</u>	<u>\$ 85.3</u>	<u>\$ 89.7</u>

- ❖ **Long-term debt**, including amounts due within one year, decreased \$4.4 million this year from \$89.7 million to \$85.3 million. The decrease was primarily the result of refinancing the former MPC Series 2003 Bonds.
- ❖ For more detailed information on long-term debt see Note 7 of this report.

ECONOMIC FACTORS, RATES, AND NEXT YEAR'S BUDGET

- ❖ **Revenues are expected to increase slightly** – City sales tax is expected to increase 4% or \$1.6 million as consumer spending continues to improve with the economy. State shared revenues are projected to increase 9%. Currently, the City of Surprise is the tenth most populated city in Arizona.
- ❖ **Personnel increase** – For the FY2017 budget, represented and non-represented public safety employees received a step increase ranging from 3% to 5%. All city employees on the general salary plan received a 2% merit increase. The FY2017 budget also includes the addition of 41.9 full-time equivalents (FTE) primarily to support public safety and the City's utility billing service. The increase in FTEs will be offset by an elimination of \$1.0 million council discretionary contingency, targeted personnel savings, and retaining the FY2016 primary property tax rate.
- ❖ **Next year's budget** – Total budgeted expenditures for the General Fund for fiscal year 2017 is \$113.7 million, an increase of \$11.9 million over the FY2016 adopted budget of \$100.2 million. The increase in the budget is primarily due to additional public safety personnel and transfers out for vehicle and asset replacement.

FINANCIAL CONTACT

The financial report is designed to provide a general overview of the City of Surprise's finances and to demonstrate accountability for the use of public funds. Questions about any of the information provided in this report, or requests for additional financial information, should be addressed to the City's Chief Financial Officer at: 16000 North Civic Center Plaza, Surprise, Arizona 85374.

FINANCIAL SECTION – BASIC FINANCIAL STATEMENTS – GOVERNMENT-WIDE FINANCIAL STATEMENTS

The Financial Section is divided into five subsections. The third subsection is comprised of the Basic Financial Statements that are the core of general-purpose external financial reporting for local governments, and are separated into three components. The first component is comprised of the government-wide financial statements. These financial statements incorporate all of the City's governmental and business-type activities. The business-type activities are financed in whole or in part by fees charged to external parties for goods or services. There are two basic government-wide financial statements: the statement of net position and the statement of activities.



SURPRISE

ARIZONA

City of Surprise, Arizona
Statement of Net Position
June 30, 2016

	Governmental Activities	Business-Type Activities	Total
Assets			
Cash and investments	\$ 71,459,354	\$ 30,342,445	\$ 101,801,799
Receivables (net of allowances)			
Accounts	914,974	6,929,897	7,844,871
Taxes and franchise fees	9,239,542	-	9,239,542
Grants	1,010,282	-	1,010,282
Intergovernmental	1,501,261	-	1,501,261
Internal balances	(12,329,140)	12,329,140	-
Other	500,992	4,068	505,060
Prepaid items and other assets	338,956	124,471	463,427
Inventory	879,109	982,415	1,861,524
Restricted cash and investments	6,858,860	14,649,447	21,508,307
Capital assets, non-depreciable	54,614,761	23,260,581	77,875,342
Capital assets, depreciable	683,254,953	380,119,458	1,063,374,411
Accumulated depreciation	(294,424,301)	(94,901,986)	(389,326,287)
Total assets	<u>523,819,603</u>	<u>373,839,936</u>	<u>897,659,539</u>
Deferred Outflows of Resources			
Pension related	<u>22,884,246</u>	<u>1,909,864</u>	<u>24,794,110</u>
Liabilities			
Accounts payable	6,613,472	4,147,945	10,761,417
Accrued payroll and related taxes	2,524,167	272,820	2,796,987
Deposits	237,486	388,965	626,451
Unearned revenues	2,396,813	1,010,772	3,407,585
Contracts payable, due in less than one year	2,891,971	209,824	3,101,795
Contracts payable, due in more than one year	95,625	-	95,625
Claims payable	1,645,325	-	1,645,325
Other liabilities	109,837	-	109,837
Compensated absences payable, due in less than one year	2,521,247	339,135	2,860,382
Compensated absences payable, due in more than one year	3,481,720	468,330	3,950,050
Matured bond and loan interest payable	859,109	576,024	1,435,133
Matured bonds and loans payable	2,361,425	553,575	2,915,000
Bonds, loans and payables due in less than one year	2,468,738	2,441,263	4,910,001
Bonds, loans and payables due in more than one year	36,186,296	41,047,581	77,233,877
Net pension liability	<u>66,284,151</u>	<u>10,320,778</u>	<u>76,604,929</u>
Total liabilities	<u>130,677,382</u>	<u>61,777,012</u>	<u>192,454,394</u>
Deferred Inflows of Resources			
Pension related	5,068,426	871,577	5,940,003
Net Position			
Net investment in capital assets	405,111,110	270,081,565	675,192,675
Restricted for:			
Public works	8,365,482	-	8,365,482
Sewer system repair and replacement	-	5,419,848	5,419,848
Debt service	813	7,620,039	7,620,852
Parks	1,720,258	-	1,720,258
Library	4,572,083	-	4,572,083
Transportation	3,904,042	-	3,904,042
Police	2,548,165	-	2,548,165
Court	223,954	-	223,954
Fire	1,408,728	-	1,408,728
Unrestricted	<u>(16,896,594)</u>	<u>29,979,759</u>	<u>13,083,165</u>
Total net position	<u>\$ 410,958,041</u>	<u>\$ 313,101,211</u>	<u>\$ 724,059,252</u>

See accompanying Notes to Financial Statements.

City of Surprise, Arizona
Statement of Activities
Fiscal Year Ended June 30, 2016

Programs	Expenses	Program Revenues		
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions
Governmental activities:				
General government	\$ 18,906,430	\$ 5,041,335	\$ 177,396	\$ 1,556,855
Public safety	47,273,449	3,778,584	1,079,258	2,466,872
Public works and streets	38,670,796	853,321	8,403,973	2,433,481
Community development	10,235,430	2,552,293	27,248	-
Culture and recreation	25,690,406	5,894,021	1,490,464	5,101,201
Interest on long-term debt	1,472,910	-	-	-
Total governmental activities	<u>142,249,421</u>	<u>18,119,554</u>	<u>11,178,339</u>	<u>11,558,409</u>
Business-type activities:				
Water	11,823,538	12,195,621	-	1,090,133
Sewer	20,399,067	16,151,096	-	2,017,132
Sanitation	7,972,061	7,099,896	-	-
Total business-type activities	<u>40,194,666</u>	<u>35,446,613</u>	<u>-</u>	<u>3,107,265</u>
Total primary government	<u>\$ 182,444,087</u>	<u>\$ 53,566,167</u>	<u>\$ 11,178,339</u>	<u>\$ 14,665,674</u>

General revenues:
 Property taxes
 Sales taxes
 Franchise taxes
 Unrestricted State shared revenues
 Unrestricted investment earnings
 Other
Transfers in (out)
 Total general revenues and transfers

 Change in net position
Net position - beginning
Net position - ending

(Continued)

Net (Expense) Revenues and Changes in Net Position		
Governmental Activities	Business-Type Activities	Total
\$ (12,130,844)		\$ (12,130,844)
(39,948,735)		(39,948,735)
(26,980,021)		(26,980,021)
(7,655,889)		(7,655,889)
(13,204,720)		(13,204,720)
(1,472,910)		(1,472,910)
(101,393,119)		(101,393,119)
	\$ 1,462,216	1,462,216
	(2,230,839)	(2,230,839)
	(872,165)	(872,165)
	(1,640,788)	(1,640,788)
(101,393,119)	(1,640,788)	(103,033,907)
9,962,925	-	9,962,925
46,807,817	-	46,807,817
5,062,719	-	5,062,719
30,560,635	-	30,560,635
607,602	319,068	926,670
407,445	-	407,445
201,576	(201,576)	-
93,610,719	117,492	93,728,211
(7,782,400)	(1,523,296)	(9,305,696)
418,740,441	314,624,507	733,364,948
\$ 410,958,041	\$ 313,101,211	\$ 724,059,252

See accompanying Notes to Financial Statements.



SURPRISE

ARIZONA

FINANCIAL SECTION – BASIC FINANCIAL STATEMENTS – FUND FINANCIAL STATEMENTS

The Financial Section is divided into five subsections. The fourth subsection is also comprised of the Basic Financial Statements that are the core of general-purpose external financial reporting for local governments, and are separated into three components. The second component is comprised of the fund financial statements. These financial statements are presented on the basis of funds, in contrast to the government-wide financial statements.

City of Surprise, Arizona

Balance Sheet

Governmental Funds

June 30, 2016

			General Government	
	General Fund	General Capital Projects Fund	Development Fee Fund	Highway User Revenue Fund
Assets				
Cash and investments	\$ 34,922,236	\$ 1,886,162	\$ 1,817	\$ 986,878
Receivables (net of allowances)				
Accounts	908,325	-	-	6,649
Taxes and franchise fees	8,522,991	377,956	-	-
Grants	-	77,901	-	-
Intergovernmental	153,000	-	-	1,348,261
Due from other funds	771,371	-	-	-
Other	361,296	-	-	-
Prepaid items and other assets	317,656	5,167	-	270
Inventory	531,173	-	-	347,936
Restricted cash and investments	2,001,248	320,731	-	2,000
Advances to other funds	438,681	36,019,204	-	-
Total assets	<u>\$ 48,927,977</u>	<u>\$ 38,687,121</u>	<u>\$ 1,817</u>	<u>\$ 2,691,994</u>
Liabilities				
Accounts payable	\$ 2,458,858	\$ 2,054,691	\$ -	\$ 847,852
Accrued payroll and related taxes	2,400,682	-	-	106,261
Due to other funds	-	-	-	-
Deposits	140,608	-	-	-
Unearned revenue	1,648,953	-	-	2,000
Contracts payable	2,676,040	-	-	-
Other liabilities	19,570	-	-	43,459
Matured bond interest payable	-	-	-	-
Matured bonds payable	-	-	-	-
Advances from other funds	-	-	43,067,484	-
Total liabilities	<u>9,344,711</u>	<u>2,054,691</u>	<u>43,067,484</u>	<u>999,572</u>
Deferred Inflows of Resources				
Unavailable revenue	<u>367,239</u>	<u>-</u>	<u>-</u>	<u>-</u>
Fund Balances (Deficits)				
Nonspendable	1,287,510	5,167	-	348,206
Restricted	-	320,731	-	1,344,216
Committed	-	36,240,450	-	-
Assigned	542,821	66,082	-	-
Unassigned	37,385,696	-	(43,065,667)	-
Total fund balances (deficits)	<u>39,216,027</u>	<u>36,632,430</u>	<u>(43,065,667)</u>	<u>1,692,422</u>
Total liabilities, deferred inflows and and fund balances	<u>\$ 48,927,977</u>	<u>\$ 38,687,121</u>	<u>\$ 1,817</u>	<u>\$ 2,691,994</u>

See accompanying Notes to Financial Statements.

Transportation Improvement Fund	Non-major Governmental Funds	Total Governmental Funds
\$ 4,379,687	\$ 21,804,204	\$ 63,980,984
-	-	914,974
257,697	80,898	9,239,542
-	932,381	1,010,282
-	-	1,501,261
-	-	771,371
-	139,696	500,992
-	14,753	337,846
-	-	879,109
237,298	4,297,583	6,858,860
-	-	36,457,885
<u>\$ 4,874,682</u>	<u>\$ 27,269,515</u>	<u>\$ 122,453,106</u>
\$ 683,754	\$ 552,932	\$ 6,598,087
4,594	2,189	2,513,726
-	771,371	771,371
95,504	1,374	237,486
181,282	564,578	2,396,813
56,016	159,915	2,891,971
46,808	-	109,837
-	859,109	859,109
-	2,361,425	2,361,425
-	4,585,913	47,653,397
<u>1,067,958</u>	<u>9,858,806</u>	<u>66,393,222</u>
-	-	367,239
-	14,753	1,655,636
-	21,399,309	23,064,256
3,709,236	296,504	40,246,190
97,488	306,260	1,012,651
-	(4,606,117)	(10,286,088)
<u>3,806,724</u>	<u>17,410,709</u>	<u>55,692,645</u>
<u>\$ 4,874,682</u>	<u>\$ 27,269,515</u>	<u>\$ 122,453,106</u>

City of Surprise, Arizona**Reconciliation of the Governmental Funds Balance Sheet Fund Balances
to the Statement of Net Position
Fiscal Year Ended June 30, 2016**

Fund balances - total governmental funds	\$ 55,692,645
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Amounts reported for *governmental activities* in the statement of net position are different because:

Capital assets used in governmental activities are not financial resources and, therefore, are not reported in the funds.

Governmental capital assets	\$ 737,869,714	
Less accumulated depreciation	<u>(294,424,301)</u>	
		443,445,413

Some revenues will not be available to pay for current-period expenditures and, therefore, are unavailable in the funds.	367,239
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Internal Service Funds used by management to charge cost of employee healthcare and risk management to individual funds are included in the statement of net position.

Net position (adjusted for interfund activity)	4,297,134	
Net pension liability, pension outflows and inflows	365,813	
Compensated absences	<u>11,754</u>	
		4,674,701

Deferred outflows and inflows of resources related to pensions are applicable to future periods and, therefore, are not reported in the funds.

Deferred outflows of resources related to pensions	22,884,246
Deferred inflows of resources related to pensions	(5,068,426)

Long-term liabilities are not due and payable in the current period and, therefore, are not reported in the funds.

Bonds payable	(35,586,375)	
Contracts payable	(95,625)	
Issuance premium (to be amortized as interest expense)	(3,068,659)	
Net pension liability	(66,284,151)	
Compensated absences payable	<u>(6,002,967)</u>	
		<u>(111,037,777)</u>

Net position of governmental activities	<u><u>\$ 410,958,041</u></u>
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SURPRISE

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City of Surprise, Arizona

Statement of Revenues, Expenditures and Changes in Fund Balances

Governmental Funds

Fiscal Year Ended June 30, 2016

	General Fund	General Capital Projects Fund	General Government Development Fee Fund	Highway User Revenue Fund
Revenues:				
Taxes	\$ 46,029,715	\$ 3,761,883	\$ -	\$ -
Licenses and permits	5,121,719	-	-	-
Intergovernmental	31,120,886	-	-	7,648,348
Charges for services	10,171,699	-	-	12,000
Grants	-	928,406	-	-
Fines	1,031,468	-	-	-
Rents	630,514	-	-	-
Development fees	-	-	757,254	-
Interest	302,138	11,852	3,643	11,008
Donations	227,439	-	-	-
Indirect charges	4,884,443	-	-	-
Other	358,996	3,689	-	12,110
Total revenues	<u>99,879,017</u>	<u>4,705,830</u>	<u>760,897</u>	<u>7,683,466</u>
Expenditures:				
Current				
General government	16,171,124	-	-	-
Public safety	43,600,196	-	-	-
Public works and streets	6,742,779	-	-	7,986,477
Community development	9,694,429	-	-	-
Culture and recreation	16,002,124	-	-	-
Capital outlay	-	31,987,627	-	219,634
Debt service				
Principal	-	-	-	-
Interest and fiscal charges	-	-	-	-
Bond issuance costs	-	-	-	-
Total expenditures	<u>92,210,652</u>	<u>31,987,627</u>	<u>-</u>	<u>8,206,111</u>
Excess (deficiency) of revenues over (under) expenditures	<u>7,668,365</u>	<u>(27,281,797)</u>	<u>760,897</u>	<u>(522,645)</u>
Other financing sources (uses)				
Proceeds from sale of capital assets	121,521	186,000	-	-
Transfers in	2,814,121	5,593,600	723,215	-
Transfers out	(7,681,925)	-	(363,568)	-
Total other financing sources (uses)	<u>(4,746,283)</u>	<u>5,779,600</u>	<u>359,647</u>	<u>-</u>
Net change in fund balances	<u>2,922,082</u>	<u>(21,502,197)</u>	<u>1,120,544</u>	<u>(522,645)</u>
Fund Balances (deficits), beginning	36,216,740	58,134,627	(44,186,211)	2,057,744
Increase in inventories	77,205	-	-	157,323
Fund balances (deficits), ending	<u>\$ 39,216,027</u>	<u>\$ 36,632,430</u>	<u>\$ (43,065,667)</u>	<u>\$ 1,692,422</u>

See accompanying Notes to Financial Statements.

Transportation Improvement Fund	Non-major Governmental Funds	Total Governmental Funds
\$ 3,417,193	\$ 3,700,112	\$ 56,908,903
-	-	5,121,719
-	440,454	39,209,688
-	1,179,754	11,363,453
133,328	1,998,886	3,060,620
-	183,510	1,214,978
-	-	630,514
-	2,539,828	3,297,082
36,517	242,444	607,602
-	877	228,316
-	-	4,884,443
-	17,404	392,199
<u>3,587,038</u>	<u>10,303,269</u>	<u>126,919,517</u>
-	135,059	16,306,183
-	833,350	44,433,546
2,361,135	3,402,076	20,492,467
289,682	96,335	10,080,446
-	2,414,215	18,416,339
489,458	3,814,333	36,511,052
-	2,361,425	2,361,425
-	1,749,568	1,749,568
-	19,762	19,762
<u>3,140,275</u>	<u>14,826,123</u>	<u>150,370,788</u>
<u>446,763</u>	<u>(4,522,854)</u>	<u>(23,451,271)</u>
-	29,300	336,821
-	4,686,080	13,817,016
-	(4,621,514)	(12,667,007)
-	93,866	1,486,830
<u>446,763</u>	<u>(4,428,988)</u>	<u>(21,964,441)</u>
3,359,961	21,839,697	77,422,558
-	-	234,528
<u>\$ 3,806,724</u>	<u>\$ 17,410,709</u>	<u>\$ 55,692,645</u>

City of Surprise, Arizona
**Reconciliation of the Statement of Revenues, Expenditures and Changes in Fund Balances of
Governmental Funds to the Statement of Activities
Fiscal Year Ended June 30, 2016**

Net change in fund balances, total governmental funds		\$ (21,964,441)
Amounts reported for <i>governmental activities</i> in the statement of activities are different because:		
Governmental funds report the portion of capital outlay for capitalized assets as expenditures. However, in the statement of activities, the cost of those assets are allocated over their estimated useful lives as depreciation expense.		
Expenditures for capitalized assets	\$ 34,381,958	
Less current year depreciation	<u>(25,964,486)</u>	8,417,472
The net effect of various miscellaneous transactions involving capital assets (i.e., sales, trade-ins, and donations) is to decrease net position.		
Capital contributions	7,496,504	
Disposals of assets	<u>(4,156,269)</u>	3,340,235
Revenues in the statement of activities that do not provide current financial resources are not reported as revenues in the funds.		
		106,405
Internal service funds are used by management to charge the costs of employee healthcare and risk management. The net revenue of certain activities of the internal services funds is reported in the statement of activities.		
Change in net position for the internal service funds (adjusted for interfund activity)		271,659
Inventories are recorded using the purchases method in the governmental funds and an adjustment is made to record inventory using the consumption method for the statement of activities.		
Change in inventory		234,528
Governmental funds report City pension contributions as expenditures when made. However, in the statement of activities, pension expense is the cost of benefits earned adjusted for member contributions, the recognition of changes in deferred outflows and inflows of resources related to pensions, and the investment experience.		
Pension contributions		7,623,644
Pension expense		<u>(8,400,638)</u>
Debt proceeds provide current financial resources to governmental funds, but issuing debt increases long-term liabilities in the statement of net position. Also, the effect of premiums, discounts and similar items when debt is first issued. These items are current finance resources or uses to governmental funds whereas, these amounts are amortized in the statement of activities. This amount is the net effect of these differences in the treatment of long-term liabilities and debt related items.		
Amortization of issuance premium	296,420	
Contracts payable	205,100	
Principal paid	<u>2,361,425</u>	2,862,945
Under the modified accrual basis of accounting used in the governmental funds, expenditures are not recognized for transactions that are not normally paid with expendable available resources. In the statement of activities, however, which is presented on the accrual basis of accounting, expenses and liabilities are reported regardless of when the financial resources are available.		
Increase in compensated absences		<u>(274,209)</u>
Change in net position of governmental activities, statement of activities		<u><u>\$ (7,782,400)</u></u>

See accompanying Notes to Financial Statements.



SURPRISE

ARIZONA

City of Surprise, Arizona
Statement of Net Position
Proprietary Funds
June 30, 2016

Business-Type Activities - Enterprise Funds			
Assets	Water Fund	Sewer Fund	Sanitation Fund
Cash and investments	\$ 9,175,916	\$ 13,690,737	\$ 7,475,792
Restricted cash and investments	93,956	14,350,035	205,456
Receivables (net of allowances)			
Accounts	2,603,869	3,013,117	1,312,911
Other	4,068	-	-
Other assets	117,646	6,825	-
Inventory	179,199	577,198	226,018
Total current assets	<u>12,174,654</u>	<u>31,637,912</u>	<u>9,220,177</u>
Noncurrent assets			
Advances to other funds	-	11,195,512	-
Capital assets	120,176,164	275,765,755	7,438,120
Accumulated depreciation	(22,866,507)	(68,676,954)	(3,358,525)
Total noncurrent assets	<u>97,309,657</u>	<u>218,284,313</u>	<u>4,079,595</u>
Total assets	<u>109,484,311</u>	<u>249,922,225</u>	<u>13,299,772</u>
Deferred Outflows of Resources			
Deferred outflows related to pensions	602,124	723,491	584,249
Total deferred outflows of resources	<u>602,124</u>	<u>723,491</u>	<u>584,249</u>
Liabilities			
Current liabilities:			
Accounts payable	877,534	2,640,237	630,174
Accrued payroll and related taxes	77,517	111,712	83,591
Deposits	86,666	188,560	113,739
Unearned revenues	-	919,055	91,717
Claims payable	-	-	-
Compensated absences payable	105,901	159,754	73,480
Contracts payable	7,290	202,534	-
Interest payable	-	576,024	-
Matured bonds and loans payable	-	553,575	-
Bonds, loans and payables due in less than one year	-	2,441,263	-
Total current liabilities	<u>1,154,908</u>	<u>7,792,714</u>	<u>992,701</u>
Noncurrent liabilities:			
Compensated absences payable, due in more than one year	146,244	220,613	101,473
Bonds, loans and payables due in more than one year	-	41,047,581	-
Net pension liability	3,253,841	3,909,694	3,157,243
Total noncurrent liabilities	<u>3,400,085</u>	<u>45,177,888</u>	<u>3,258,716</u>
Total liabilities	<u>4,554,993</u>	<u>52,970,602</u>	<u>4,251,417</u>
Deferred Inflows of Resources			
Deferred inflows related to pensions	274,783	330,169	266,625
Total deferred inflows of resources	<u>274,783</u>	<u>330,169</u>	<u>266,625</u>
Net Position			
Net investment in capital assets	97,309,657	168,692,313	4,079,595
Restricted			
Sewer system repair and replacement	-	5,419,848	-
Debt service	-	7,620,039	-
Unrestricted	7,947,002	15,612,745	5,286,384
Total net position	<u>\$ 105,256,659</u>	<u>\$ 197,344,945</u>	<u>\$ 9,365,979</u>
Adjustment to reflect the consolidation of the internal service funds related to the enterprise fund.			
Total net position of the business-type activities			

See accompanying Notes to Financial Statements.

City of Surprise, Arizona
Statement of Net Position
Proprietary Funds
June 30, 2016

		Governmental Activities	
	Total Enterprise Funds	Internal Service Fund	
\$	30,342,445	\$	7,478,370
	14,649,447		-
	6,929,897		-
	4,068		-
	124,471		1,110
	982,415		-
	<u>53,032,743</u>		<u>7,479,480</u>
	11,195,512		-
	403,380,039		-
	(94,901,986)		-
	<u>319,673,565</u>		<u>-</u>
	<u>372,706,308</u>		<u>7,479,480</u>
	1,909,864		75,266
	<u>1,909,864</u>		<u>75,266</u>
	4,147,945		15,385
	272,820		10,441
	388,965		-
	1,010,772		-
	-		1,645,325
	339,135		4,937
	209,824		-
	576,024		-
	553,575		-
	2,441,263		-
	<u>9,940,323</u>		<u>1,676,088</u>
	468,330		6,817
	41,047,581		-
	<u>10,320,778</u>		<u>406,730</u>
	<u>51,836,689</u>		<u>413,547</u>
	<u>61,777,012</u>		<u>2,089,635</u>
	871,577		34,349
	<u>871,577</u>		<u>34,349</u>
	270,081,565		-
	5,419,848		-
	7,620,039		-
	<u>28,846,131</u>		<u>5,430,762</u>
\$	<u>311,967,583</u>	\$	<u>5,430,762</u>
	1,133,628		
\$	<u>313,101,211</u>		

City of Surprise, Arizona

Statement of Revenues, Expenses and Changes in Net Position

Proprietary Funds

Fiscal Year Ended June 30, 2016

	Business-Type Activities-Enterprise Funds		
	Water Fund	Sewer Fund	Sanitation Fund
Operating Revenues:			
Charges for services	\$ 12,137,187	\$ 16,107,464	\$ 7,095,469
Other	58,521	5,222	4,427
Total operating revenues	12,195,708	16,112,686	7,099,896
Operating Expenses:			
Cost of sales and services	7,543,605	9,304,037	5,277,202
Indirect costs	1,338,230	1,691,783	1,854,430
Depreciation	2,909,051	7,251,355	863,979
Total operating expenses	11,790,886	18,247,175	7,995,611
Operating income (loss)	404,822	(2,134,489)	(895,715)
Non-operating revenues (expenses)			
Development fees	486,207	1,597,179	-
Extension fees	-	38,410	-
Developer reimbursement	(32,652)	(400,505)	-
Interest revenue	103,870	148,940	66,258
Gain\ (Loss) on disposal of capital assets	(8,087)	38,724	23,550
Amortization on premium	-	78,152	-
Interest and fiscal charges	-	(1,973,747)	-
Intergovernmental	8,000	-	-
Total non-operating revenues (expenses)	557,338	(472,847)	89,808
Income (loss) before contributions and transfers	962,160	(2,607,336)	(805,907)
Capital contributions	603,926	419,953	948,433
Transfers out	(390,975)	(724,626)	(34,408)
Changes in net position	1,175,111	(2,912,009)	108,118
Net position, beginning	104,081,548	200,256,954	9,257,861
Net position, ending	\$ 105,256,659	\$ 197,344,945	\$ 9,365,979
Adjustment to reflect consolidation of internal service funds related to the enterprise fund.			
Total change in net position of the business-type activities			

See accompanying Notes to Financial Statements.

City of Surprise, Arizona

Statement of Revenues, Expenses and Changes in Net Position

Proprietary Funds

Fiscal Year Ended June 30, 2016

	Governmental Activities
Total Enterprise Funds	Internal Service Fund
\$ 35,340,120	\$ 12,397,024
68,170	-
<u>35,408,290</u>	<u>12,397,024</u>
22,124,844	12,129,333
4,884,443	-
11,024,385	-
<u>38,033,672</u>	<u>12,129,333</u>
<u>(2,625,382)</u>	<u>267,691</u>
2,083,386	-
38,410	-
(433,157)	-
319,068	104,217
54,187	-
78,152	-
(1,973,747)	-
8,000	-
<u>174,299</u>	<u>104,217</u>
<u>(2,451,083)</u>	<u>371,908</u>
1,972,312	-
<u>(1,150,009)</u>	<u>-</u>
(1,628,780)	371,908
<u>313,596,363</u>	<u>5,058,854</u>
<u>\$ 311,967,583</u>	<u>\$ 5,430,762</u>
105,484	
<u>\$ (1,523,296)</u>	

City of Surprise, Arizona
Statement of Cash Flows
Proprietary Funds
Fiscal Year Ended June 30, 2016

	Business-Type Activities			Business-Type Activities	Governmental Activities
	Water Fund	Sewer Fund	Sanitation Fund	Total	Internal Service Funds
Cash flows from operating activities					
Cash received from customers	\$ 11,877,107	\$ 16,757,312	\$ 7,169,313	\$ 35,803,732	\$ 12,397,822
Cash paid to suppliers	(6,517,054)	(5,529,831)	(4,348,953)	(16,395,838)	(11,932,641)
Cash paid to employees	(2,314,047)	(3,480,094)	(2,558,586)	(8,352,727)	(376,257)
Other operating cash receipts	58,521	5,222	4,427	68,170	-
Net cash provided by operating activities	3,104,527	7,752,609	266,201	11,123,337	88,924
Cash flows from capital and related financing activities					
Proceeds received from development fees	486,207	1,597,179	-	2,083,386	-
Proceeds received from extension fees	-	38,410	-	38,410	-
Principal and interest paid on bonds, loans and payables	-	(3,652,762)	-	(3,652,762)	-
Sale/acquisitions of capital assets	(6,211,616)	(4,974,302)	(1,431,131)	(12,617,049)	-
Net cash provided by (used in) capital and related financing activities	(5,725,409)	(6,991,475)	(1,431,131)	(14,148,015)	-
Cash flows from noncapital financing activities					
Cash received from other governments	8,000	-	-	8,000	-
Cash received from other funds	-	1,602,927	-	1,602,927	-
Cash paid to other funds	(390,975)	(724,626)	(34,408)	(1,150,009)	-
Net cash provided by (used in) noncapital and related financing activities	(382,975)	878,301	(34,408)	460,918	-
Cash flows from investing activities					
Sales of investments	-	5,445,750	-	5,445,750	-
Purchases of investments	-	(6,623,774)	-	(6,623,774)	-
Cash received from interest income	103,870	148,940	66,258	319,068	104,217
Net cash provided by (used in) investing activities	103,870	(1,029,084)	66,258	(858,956)	104,217
Net change in cash	(2,899,987)	610,351	(1,133,080)	(3,422,716)	193,141
Cash, beginning of year	12,169,859	20,485,045	8,814,328	41,469,232	7,285,229
Cash, end of year	\$ 9,269,872	\$ 21,095,396	\$ 7,681,248	\$ 38,046,516	\$ 7,478,370
Reconciliation of operating income (loss) to net cash provided by operating activities					
Operating income (loss)	\$ 404,822	\$ (2,134,489)	\$ (895,715)	\$ (2,625,382)	\$ 267,691
Adjustments to reconcile operating income (loss) to net cash provided by operating activities					
Depreciation expense	2,909,051	7,251,355	863,979	11,024,385	-
(Increase) decrease in assets:					
Accounts receivable	(248,264)	225,635	91,073	68,444	798
Other receivables	(3,373)	-	-	(3,373)	-
Other assets	(5,186)	(6,825)	4,310	(7,701)	292
Inventory	(129,152)	40,342	(33,441)	(122,251)	-
Increase (Decrease) in Current Liabilities:					
Accounts payable	113,082	1,798,325	180,296	2,091,703	(304,264)
Accrued payroll and related taxes	34,158	17,365	24,796	76,319	3,074
Deposits	(8,443)	(35,116)	(20,416)	(63,975)	-
Unearned revenue	-	459,329	3,187	462,516	-
Compensated absences	20,571	23,462	144	44,177	5,235
Net pension liability	17,261	113,226	47,988	178,475	9,234
Claims payable	-	-	-	-	106,864
Total adjustments	2,699,705	9,887,098	1,161,916	13,748,719	(178,767)
Net cash provided by operating activities	\$ 3,104,527	\$ 7,752,609	\$ 266,201	\$ 11,123,337	\$ 88,924
Noncash capital activities					
Capital asset contributions from developers/governmental activities	\$ 603,926	\$ 419,953	\$ 948,433	\$ 1,972,312	\$ -
Reconciliation to Statement of Net Position					
Cash and investments	\$ 9,175,916	\$ 13,690,737	\$ 7,475,792	\$ 30,342,445	\$ 7,478,370
Restricted cash and investments	93,956	14,350,035	205,456	14,649,447	-
Total cash and investments	\$ 9,269,872	\$ 28,040,772	\$ 7,681,248	\$ 44,991,892	\$ 7,478,370
Less investments	-	(6,945,376)	-	(6,945,376)	-
Total cash	\$ 9,269,872	\$ 21,095,396	\$ 7,681,248	\$ 38,046,516	\$ 7,478,370

See accompanying Notes to Financial Statements.

City of Surprise, Arizona
Statement of Fiduciary Net Position
Fiduciary Fund
June 30, 2016

	Flexible Spending Account Agency Fund
Assets	
Cash and investments	<u>\$ 126,271</u>
Total assets	<u>126,271</u>
Liabilities	
Deposits held for others	<u>126,271</u>
Total liabilities	<u><u>\$ 126,271</u></u>

See accompanying Notes to Financial Statements.



FINANCIAL SECTION – NOTES TO THE FINANCIAL STATEMENTS

The Financial Section is divided into five subsections. The fifth subsection is also comprised of the Basic Financial Statements, which are the core of general-purpose external financial reporting for local governments, and are separated into three components. In addition to the government-wide and fund financial statements, the third component, the notes to the basic financial statements are an integral part of the those financial statements, and include a summary of significant accounting policies and other disclosures considered necessary for a clear understanding of the accompanying financial statements.

NOTES TO FINANCIAL STATEMENTS

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The financial statements of the City of Surprise, Arizona (the City), have been prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as applied to government units. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles. The more significant of the government's accounting policies are described below.

For the year ended June 30, 2016, the City implemented the provisions of GASB Statement No. 72, *Fair Value Measurement and Application*; GASB Statement No. 73, *Accounting and Financial Reporting for Pensions and Related Assets That Are Not Within the Scope of GASB Statement 68*, and *Amendments to Certain Provisions of GASB Statements 67 and 68*; GASB Statement No. 76, *The Hierarchy of Generally Accepted Accounting Principles for State and Local Governments* and GASB Statement No. 82, *Pension Issues*. GASB Statement No. 72 establishes standards for measuring fair value and applying fair value to certain investments and disclosures related to all fair value measurements. GASB Statements No. 73 and 82 amended GASB Statement No. 68 requirements related to note disclosures for pension related required supplementary information and payables to defined benefit pension plans. GASB Statement No. 76 establishes the hierarchy of sources of accounting principles used to prepare financial statements of state and local governmental entities in conformity with generally accepted accounting principles.

A. REPORTING ENTITY

The City is located approximately 20 miles northwest of downtown Phoenix and was incorporated in 1960 under the provision of the Arizona Constitution. During 2003, the voters approved the Home Rule, an alternative expenditure limitation for budget years through June 30, 2007. City of Surprise voters approved an Alternative Expenditure Limitation (Permanent Base Adjustment) on November 7, 2006. The City is governed by an elected mayor, and a six member council, and offers the following services: public safety (police and fire), highways and streets, sanitation, water, sewer, health and social services, culture and recreation, public improvements, planning and zoning, and general administrative services.

COMPONENT UNITS

As required by accounting principles generally accepted in the United States of America, these financial statements present the primary government and its component units, entities for which the government is considered to be financially accountable. A primary government is considered financially accountable for another organization when it can impose its will or have a financial benefit or burden relationship. Blended component units, although legally separate entities are, in substance, part of the government's operations and so data from these units are combined with data of the primary government. The following entities are blended component units of the City:

The Surprise Municipal Property Corporation (Corporation) is an Arizona nonprofit corporation formed under the provision of Title 10 of the Arizona Revised Statutes. The Corporation was organized to acquire, construct, reconstruct, or improve buildings and other real and personal property suitable for leasing or sale to the City.

Various Street Lighting Improvement Districts (SLIDs) are maintained by the City for developing areas, and the City's council is the board for the SLIDs. The SLID property tax assessment rates are approved by the City's council. The SLIDs are reported in a special revenue fund.

Marley Park Community Facilities District (CFD) is maintained by the City for a developing area. The CFD's board is the same as the City's council. CFD property tax rates are approved by the City's council. The CFD is reported in a special revenue fund.

For the fiscal year ended June 30, 2016, the City had no discretely presented component units. Separately issued financial statements are not prepared for any of the component units.

NOTES TO FINANCIAL STATEMENTS

RELATED ORGANIZATIONS

A related organization is one for which the primary government is not financially accountable even though the primary government appoints a voting majority of the organization's governing board.

EXCLUDED ORGANIZATIONS

Although there are schools located within the geographic boundaries of the City, school districts are separate from the municipalities in which they are located, with their own elected officials and taxing powers. Consequently, the report does not include the activities of the area school districts.

B. MEASUREMENT FOCUS, BASIS OF ACCOUNTING, AND BASIS OF PRESENTATION

The accounts of the City are organized and operated on the basis of funds. A fund is an independent fiscal and accounting entity with a self-balancing set of accounts. Fund accounting segregates funds according to their intended purpose and is used to aid management in demonstrating compliance with finance-related legal and contractual provisions. The minimum number of funds is maintained consistent with legal and managerial requirements.

Government-Wide Financial Statements

The government-wide financial statements (i.e., the statement of net position and the statement of activities) report information on all of the non-fiduciary activities of the primary government and its component units. The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Agency funds do not have a measurement focus. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Property taxes are recognized as revenues in the year for which they are levied. Grants and similar items are recognized as revenue as soon as all eligibility requirements imposed by the grantor or provider have been met. As a general rule, the effect of internal activity has been eliminated from the government-wide financial statements; however, the effects of interfund services provided and used between functions are reported as expenses and program revenues at amounts approximating their external exchange value.

The government-wide statements of activities present a comparison between expenses, both direct and indirect, and program revenues for each segment of the business-type activities of the City and for each governmental program. Direct expenses are those that are specifically associated with the service, program or department and are therefore clearly identifiable to a particular function. Program revenues include charges paid by the receipts of the goods or services offered by the programs and grants and contributions that are restricted to meeting the operational or capital requirements of a particular program. Revenues, which are not classified as program revenue, are presented as general revenues. The comparison of program revenues and expenses identifies the extent to which each program or business segment is self-financing or draws from the general revenues of the City.

Net position is reported as restricted when constraints placed on net position is either externally imposed by creditors (such as through debt covenants), grantors, contributors, or laws or regulations of other governments or imposed by law through constitutional provisions or enabling legislation.

Using a fund accounting system, amounts are spent in accordance with established fund authorities. Fund authorities provide rules for the fund activity and are separately established for restricted and unrestricted activity. When both restricted and unrestricted resources are available for use, it is the City's policy to use restricted resources first, then unrestricted resources as they are needed.

NOTES TO FINANCIAL STATEMENTS

Fund Financial Statements

Fund financial statements report detailed information about the City. The focus of governmental and proprietary fund financial statements is on major funds rather than reporting funds by type. Each major fund is presented in a separate column. Non-major funds are aggregated and presented in a single column. The internal service funds are presented in a single column on the face of the proprietary fund statements.

Governmental Funds

All governmental funds are accounted for using modified accrual basis of accounting and current financial resources measurement focus. Under this basis, revenues are recognized in the accounting period in which they become measurable and available. Revenues are considered to be available when they are collected within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the City considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. The revenues susceptible to accrual are property taxes, franchise fees, licenses, charges for services, interest income and intergovernmental revenues. Sales taxes collected and held by the state at year end and on behalf of the government are also recognized as revenue. Expenditures are recognized in the accounting period in which the fund liability is incurred, if measurable. Major governmental funds include the following:

The ***general fund*** is the City's primary operating fund. It accounts for all financial resources of the general government, except those required to be accounted for in another fund.

The ***general capital projects fund***, a capital projects fund, accounts for revenues and expenditures relating to the acquisition of capital items.

The ***general government development fee fund***, a special revenue fund, accounts for revenues and expenditures associated with general government development impact fees assessed to fund infrastructure and other expenditures for growth-related general government projects.

The ***highway user revenue fund****, a special revenue fund, accounts for State shared highway user revenues consisting of state taxes collected on gasoline, vehicle registration, vehicle license tax, and a number of other additional transportation related fees and expenditures that are legally restricted to expenditures for transportation and the construction, repairs, and maintenance of public works and streets.

The ***transportation improvement fund****, a special revenue fund, accounts for revenues and expenditures that are legally restricted to expenditures of existing roadway corridor improvements and the related costs of the construction of new roadways.

* These funds have not met the criterion which mandates that they be reported separately as major funds. However, the City has chosen to present these funds as major funds.

Proprietary Funds

All proprietary funds are accounted for on the flow of economic resources measurement focus and use of accrual basis of accounting. Under this method, revenues are recorded when earned and expenses are recorded at the time liabilities are incurred. Proprietary funds distinguish operating revenues and expenses from non-operating items. Operating revenues and expenses generally result from providing services and producing and delivering goods in connection with a proprietary fund's principal ongoing operations. Revenues and expenses not meeting this definition are reported as non-operating revenues and expenses.

NOTES TO FINANCIAL STATEMENTS

The **water fund** accounts for the provision of the water treatment and distribution to residential and commercial customers of the City.

The **sewer fund** accounts for sanitary sewer services provided to the residential and commercial customers of the City.

The **sanitation fund** accounts for trash collection services provided to the residential and some commercial customers of the City.

In addition, the City reports the following fund types:

Internal service funds are accounted for in essentially the same manner as the proprietary funds, using the same measurement focus and basis of accounting. The funds account for transactions of the City's internal insurance activities.

Agency fund (not included in government-wide statements) accounts for employee contributions to their flexible spending accounts. The City staff performs all administrative and accounting functions for this fund.

C. DEPOSITS AND INVESTMENTS

Cash equivalents are considered to be cash on hand, demand deposits and short-term investments with original maturities of three months or less, including amounts on deposit with the Local Government Investment Pool and invested with the Certificate of Deposit Account Registry Service (CDARS) program through Alliance Bank of Arizona.

State statutes authorize the City to invest in obligations of the U.S. Treasury, commercial paper, corporate bonds, repurchase agreements and the State Treasurer's Local Government Investment Pool. Investments are stated at fair value.

D. RESTRICTED ASSETS

Restricted cash and investments reported in the statements are comprised of restricted deposits for development and construction agreements, for outstanding debt amounts and other contractual requirements.

E. RECEIVABLES AND PAYABLES

Activity between funds that is representative of lending/borrowing arrangements outstanding at the end of the fiscal year is referred to as either "due to/from other funds" (i.e., the current portion of interfund loans) or "advances to/from other funds" (i.e., the non-current portion of interfund loans). Any residual balances outstanding between the governmental activities and business-type activities are reported in the government-wide financial statements as "internal balances."

Fund balance resulting from advances to other funds are shown as nonspendable and committed amounts.

All accounts receivable are shown net of allowance for un-collectibles when applicable.

NOTES TO FINANCIAL STATEMENTS

F. INVENTORIES AND PREPAID ITEMS

Inventories consist of expendable supplies held for consumption. For the governmental funds inventories are reported using the purchases method, expenditures are incurred as inventory is purchased and an adjustment is made at year end directly to inventory and fund balance. For the proprietary funds and government wide statements inventories are reported using the consumption method, inventory is recorded when it is purchased and expensed as it is used. Inventory is valued using the average cost method. Certain payments to vendors reflect costs applicable to future accounting periods and are reported using the consumption method in both government-wide and fund financial statements and are therefore recorded as prepaid items.

G. CAPITAL ASSETS

Capital assets, which include property, plant, equipment and infrastructure assets (e.g., streets, traffic signals and similar items), are reported in the applicable governmental or business-type activities columns in the government-wide financial statements. The City's policy defines capital assets as assets with an initial individual cost greater than \$10,000 and an estimated useful life of two or more years. Assets contributed (donated) to those funds are recorded at actual costs when available otherwise the estimated fair market value on date of receipt is used.

The costs of normal maintenance and repairs that do not add to the value of the asset or materially extend assets lives are not capitalized.

Significant outlays for capital assets and improvements are capitalized as projects are constructed. Interest incurred during the construction phase of capital assets of business-type activities is included as part of the capitalized value of assets constructed.

Depreciation of capital assets is computed and recorded by the straight-line method. Estimated useful lives of the various classes of depreciated capital assets are as follows: buildings, 20 to 50 years; improvements/infrastructure, 5 to 50 years; equipment, 2 to 15 years.

H. DEFERRED OUTFLOWS OF RESOURCES

The City recognizes the consumption of net position that is applicable to a future reporting period as deferred outflows of resources. Reported amounts are related to the requirements of accounting and financial reporting for pensions.

I. COMPENSATED ABSENCES

Vested or accumulated Paid Time Off (PTO) leave that is expected to be liquidated with expendable available financial resources is reported as an expenditure and a fund liability of the governmental fund that will pay it. Vested or accumulated PTO leave that is not expected to be liquidated with expendable available financial resources is reported in the government-wide statements. No expenditure is reported for these amounts in the governmental fund statements. Vested or accumulated PTO leave in proprietary funds and the government-wide statements is recorded as an expense and liability of those funds as the benefits accrue to employees. The internal service funds serve primarily the governmental funds, the long-term liabilities of which are included as part of the governmental activities schedule. For the governmental activities, the General Fund, Highway User Revenue Fund, Transportation Fund, and the non-major fund SPD Towing Fund and the Employee Healthcare Fund, and the Risk Management Fund have been used in prior years to liquidate the compensated absences liability.

NOTES TO FINANCIAL STATEMENTS

J. LONG-TERM OBLIGATIONS

In the government-wide financial statements, and the proprietary fund types in the fund financial statements, long-term debt and other long-term obligations are reported as liabilities in the applicable governmental activities, business-type activities, or proprietary fund type statement of net position. Bond premiums and discounts are amortized over the life of the bonds using the effective interest method. Bonds payable are reported net of the applicable bond premium or discount.

In the fund financial statements, governmental fund types recognize bond premiums and discounts, as well as bond issuance costs, during the current period. The face amount of debt is reported as other financing sources. Premiums received on debt issuances are reported as other financing sources. Issuance costs, whether or not withheld from the actual debt proceeds received, are reported as debt service expenditures.

K. PENSION PLANS

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Arizona State Retirement System (ASRS), the Public Safety Personnel Retirement System (PSPRS), and the Elected Officials Retirement Plan (EORP) and additions to/deductions from ASRS/PSPRS/EORP's fiduciary net position have been determined on the same basis as they are reported by ASRS/PSPRS/EORP. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

L. DEFERRED INFLOWS OF RESOURCES

The City recognizes the acquisition of net position that is applicable to a future reporting period as deferred inflows of resources. Reported amounts are related to the requirements of accounting and financial reporting for pensions and in connection with receivables for revenues that are not considered to be measurable and available to liquidate liabilities of the current period.

M. FUND BALANCE

In the fund financial statements, governmental funds report fund balance into classifications that comprise a hierarchy based on the extent to which the City is bound to honor constraints on the specific purpose for which those funds can be spent. The classifications of fund balance are Nonspendable, Restricted, Committed, Assigned, and Unassigned.

Nonspendable fund balances include amounts that cannot be spent because they are not in a spendable form, such as inventory or prepaid items, or because resources legally or contractually must remain intact.

Restricted fund balances are the portion of fund balance that have externally enforceable limitations on their usage through legislation or limitations imposed by creditors, grantors, laws and regulations of other governments, or enabling legislation.

Committed fund balances are self-imposed limitations by the highest level of decision making authority, namely Mayor and City Council, prior to the end of the reporting period. Mayor and City Council approval is required to commit resources or to rescind the commitment through a City Council resolution or ordinance. Only City Council can remove or change the constraints placed on committed fund balance through formal council resolution.

NOTES TO FINANCIAL STATEMENTS

Assigned fund balances are limitations imposed internally by management based on the intended use of the funds. The City Council has designated the authority to assign amounts to be used for specific purposes to the Chief Financial Officer (CFO). Approval of the CFO is necessary to establish, modify or rescind an assignment of fund balance.

Unassigned fund balances represent the residual net resources in excess of the other classifications. The General Fund is the only fund that can report a positive unassigned fund balance and any governmental fund can report a negative unassigned fund balance.

When both restricted and unrestricted resources are available for specified expenditures, restricted resources are considered spent before unrestricted resources. Within unrestricted resources, committed would be considered spent first (if available), followed by assigned (if available), and then unassigned amounts.

N. MINIMUM FUND BALANCE

The minimum fund balance is not intended to be spent. The purpose of the minimum fund balance is to ensure the City has adequate resources to meet its operational needs in the event of unusual and unforeseen circumstances. If the necessity arises to draw down fund balance below the minimum requirements that have been set, a plan to replenish the minimum fund balance will be presented to Council for approval.

Fund	Minimum Fund Balance
General Fund	\$17.6 million which is updated annually by calculating an average of budgeted personnel, supplies and services expenses over a two month period for that year’s Council Adopted Budget for the General Fund and the Highway User’s Revenue Fund.
General Capital Projects Fund	\$1 million
Transportation Improvement Fund	\$0.5 million
Tourism Fund	\$5,000
Spring Training Ticket Surcharge Fund	\$600,000

There is no effect on the presentation of fund balance on the face of the financial statements. The City is in compliance with its established minimum fund balance policies.

O. NET POSITION

The government-wide and proprietary fund financial statements present ending resources as net position. Net position is categorized to help signify their availability.

Net Investment in Capital Assets includes all capital assets of the City both depreciable and non-depreciable net of accumulated depreciation and outstanding debt balances attributable to the acquisition, construction or improvement of these assets. Net position in this category represents infrastructure of the City and is not available to meet the City’s needs.

Restricted net position consists of amounts that have external restrictions imposed upon them by creditors, grantors, contributors or laws or regulations of other governments and restrictions imposed by law through constitutional provisions or enabling legislation. Net position in this category represent amounts that are not available to meet the City’s needs as they have been promised for other purposes.

Unrestricted net position represents amounts that have not been restricted for any project or other purpose. These amounts are available to meet any needs of the City. While unrestricted net position is technically available to be spent by the City it is important to remember that the City has established financial policies that would prevent this. There are certain self-imposed criteria, such as maintaining a minimum operating fund balance that would further reduce the amount the City is willing to spend.

NOTES TO FINANCIAL STATEMENTS

P. MINIMUM NET POSITION

Minimum net position is not intended to be spent. The purpose of the minimum net position balance is to ensure the City has adequate resources to meet its operational needs in the event of unusual and unforeseen circumstances.

Within the Sanitation, Sewer and Water Funds, net position is to be maintained at an amount equal to the average budgeted personnel, supplies and services expenses over a two month period. Additionally, an amount will be kept for repair and replacement and will be maintained at a minimum of 2% of all tangible capital assets of the system.

The Risk Management Fund will maintain net position at an amount that, together with purchased insurance policies, will adequately indemnify the City. An actuarial evaluation will be performed annually to recommend appropriate funding levels, which will be approved by the City Council.

The Employee Healthcare Fund will maintain net position at a level which, together with purchased insurance policies, will adequately indemnify the City. An actuarial evaluation will be performed annually to recommend appropriate funding levels, which will be reviewed by the Loss Trust Fund Board and approved by the City Council.

The City is in compliance with its established minimum net position policies.

Q. PROPERTY TAX

A primary tax levy is limited to an increase of two percent over the previous year's maximum allowable primary levy plus an increased dollar amount due to a net gain in property not taxed the previous year (Section 42-301, Arizona Revised Statutes). The two percent increase is based on the City's "maximum allowable levy" for the prior year.

Property taxes are recognized as revenues in the year they are levied and collected, or if they are collected within 60 days subsequent to fiscal year-end. Property taxes not collected within 60 days subsequent to fiscal year-end, or collected in advance of the year-end for which they are levied, are reported as unavailable revenues.

The County levies real property taxes on or before the third Monday in August, that become due and payable in two equal installments. The first installment is due on the first day of October, and becomes delinquent after the first business day in November. The second installment is due on the first day of March of the next year, and becomes delinquent after the first business day of May. The County also levies various personal property taxes during the year, which are due the second Monday of the month following receipt of the tax notice and becomes delinquent 30 days thereafter.

R. GRANT REVENUES

Federal grants and assistance awards made on the basis of entitlement periods are recorded as intergovernmental receivables and revenues when entitlement occurs. All other federal reimbursement grants are recorded as intergovernmental receivables and revenues when the related expenditures are incurred.

S. INTERFUND TRANSACTIONS

Interfund services provided or used are accounted for as revenues, expenditures or expenses. All other interfund transactions are reported as transfers.

T. ESTIMATES

The preparation of the financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. Actual results may differ from those estimates.

NOTES TO FINANCIAL STATEMENTS

NOTE 2 – CASH AND INVESTMENTS

Arizona Revised Statutes authorize the City to invest public monies in the State Treasurer's local government investment pools, the County Treasurer's investment pool, in obligations of the U.S. Government and its agencies, obligations of the State and certain local government subdivisions, interest-bearing savings accounts and certificates of deposit, collateralized repurchase agreements, certain obligations of U.S. corporations, and certain other securities. The statutes do not include any requirements for credit risk, custodial credit risk, concentration of credit risk, interest rate risk, or foreign currency risk for the City's investments.

Custodial Credit Risk – Deposits. Custodial credit risk is the risk that in the event of bank failure the City's deposits may not be returned to the City. The City does not have a deposit policy for custodial credit risk. At year end, the carrying amount of the City's deposits was \$42,005,598 and the bank balance was \$42,907,069. At year end, \$5,367,654 of the City's deposits was covered by federal depository insurance. The remaining bank balance not covered by federal depository insurance of \$37,539,415 was fully collateralized. The collateral is held in the pledging banks trust department in the name of the pledging bank.

A reconciliation of the bank balance to the City's deposit balance as of June 30, 2016 follows:

Total per bank balance	\$ 42,907,069
Reconciling items:	
Outstanding checks	(1,015,756)
Deposits in transit	107,110
	<u>41,998,423</u>
Less:	
Fiduciary fund	(126,271)
Total City deposits	<u>\$ 41,872,152</u>

The City's investments consisted of the following as of June 30, 2016:

Investment Type	Fair Value	Investment Maturities		
		Less than 1 year	1-2 years	2-3 years
U.S. government securities	\$ 30,717,108	\$ 1,487,302	\$ 17,297,836	\$ 11,931,970
Government sponsored entity debt	48,025,813	3,310,900	26,350,175	18,364,738
Money market mutual funds	2,284,875	2,284,875	-	-
Local government investment pool	402,983	402,983	-	-
	<u>\$ 81,430,779</u>	<u>\$ 7,486,060</u>	<u>\$ 43,648,011</u>	<u>\$ 30,296,708</u>

The State Treasurer's pools are external investment pools, the Local Government Investment Pool (Pool 5) and Local Government Investment Pool-Government (Pool 7), with no regulatory oversight. The pools are not required to register (and are not registered) with the Securities and Exchange Commission. The activity and performance of the pools are reviewed monthly by the State Board of Investment. The fair value of each participant's position in the State Treasurer investment pools approximates the value of the participant's shares in the pool and the participants' shares are not identified with specific investments.

NOTES TO FINANCIAL STATEMENTS

Total cash and investments for the City as of June 30, 2016, are as follows:

City's deposits	\$ 41,998,423
Cash on hand	7,175
City's investments	<u>81,430,779</u>
Total	<u>\$ 123,436,377</u>

Interest Rate Risk. The City's formal investment policy does not limit investment maturities as a means of managing its exposure to fair value losses arising from increasing interest rates.

Credit Risk. The City's investments in securities included \$48,025,813 of government sponsored entity debt. At June 30, 2016, these investments were rated by Standard and Poor's at AA+. The money market mutual funds and local government investment pool are not rated. Aside from State laws, the City's formal investment policy does not further limit its investment choices.

Custodial Credit Risk – Investments. All of the City's security investments are held in the City's name. The City's investment in the State Treasurer's investment pool represents a proportionate interest in the pool's portfolio; however the City's portion is not identified with specific investments and is not subject to custodial credit risk.

Concentration of Credit Risk. The City places no limit on the amount the City may invest in any one issuer.

Fair Value Measurements. The City uses fair value measurements to record fair value adjustments to certain assets and liabilities to determine fair value disclosures.

The City follows an accounting standard that defines fair value, establishes a framework for measuring fair value, establishes a fair value hierarchy based on the quality of inputs used to measure fair value, and requires expanded disclosures about fair value measurements. In accordance with this standard, the City has categorized its investments, based on the priority of the inputs to the valuation technique, into a three-level fair value hierarchy. The fair value hierarchy gives the highest priority to quoted prices in active markets for identical assets or liabilities (Level 1) and the lowest priority to unobservable inputs (Level III). If the inputs used to measure the financial instruments fall within different levels of the hierarchy, the categorization is based on the lowest level input that is significant to the fair value measurement of the instrument.

Financial assets and liabilities recorded on the statement of net position are categorized based on the inputs to the valuation techniques as follows:

- Level I – Financial assets and liabilities are valued using inputs that are unadjusted quoted prices in active markets accessible at the measurement date of identical financial assets and liabilities. The inputs include those traded on an active exchange, such as the New York Stock Exchange, as well as U.S. Treasury and other U.S. government and agency mortgage-backed securities that are traded by dealers or brokers in active over-the-counter markets.
- Level II – Financial assets and liabilities are valued based on quoted prices for similar assets, or inputs that are observable, either directly or indirectly for substantially the full term through corroboration with observable market data.
- Level III – Financial assets and liabilities are valued using pricing inputs which are unobservable for the asset, inputs that reflect the reporting entity's own assumptions about the assumptions market participants and would use in pricing the asset.

NOTES TO FINANCIAL STATEMENTS

Investments are measured as follows:

	6/30/2016	Level I	Level II	Level III
Investments by fair value level				
U.S. government securities	\$ 30,717,108	\$ 30,717,108	\$ -	\$ -
Government sponsored entity debt	48,025,813	-	48,025,813	-
Total investments by fair value level	<u>78,742,921</u>	<u>\$ 30,717,108</u>	<u>\$ 48,025,813</u>	<u>\$ -</u>
Investments measured at fair value				
Local government investment pool	402,983			
Total investments measured at fair value	<u>79,145,904</u>			
Investments measured at amortized cost				
Money market funds	2,284,875			
Total investments:	<u>\$ 81,430,779</u>			

Cash Reconciliation to Financial Statements

The following reconciliations are provided to reconcile cash to the government wide and fund financial statements.

<u>Government-wide Financial Statements</u>	
Total cash and investments	\$ 101,801,799
Total restricted cash and investments	21,508,307
Subtotal	<u>\$ 123,310,106</u>
Government-wide total cash and investments	\$ 123,310,106
plus: Fiduciary Fund cash and cash equivalents	126,271
Total	<u>\$ 123,436,377</u>

<u>Fund Financial Statements</u>	
<i>Governmental Funds</i>	
Cash and investments	\$ 63,980,984
Restricted cash and investments	6,858,860
	<u>70,839,844</u>
<i>Enterprise Funds</i>	
Cash and investments	30,342,445
Restricted cash and investments	14,649,447
	<u>44,991,892</u>
<i>Internal Service Funds</i>	
Cash and investments	<u>7,478,370</u>
<i>Fiduciary Funds</i>	
Cash and investments	<u>126,271</u>
Total	<u>\$ 123,436,377</u>

NOTES TO FINANCIAL STATEMENTS

NOTE 3 – ACCOUNTS RECEIVABLE

The amount due from other governments, as reported in the statement of net position includes \$1,348,261 in highway user tax, \$16,250 for animal control services, \$136,750 for police dispatch services.

Governmental funds report unavailable revenue in connection with receivables for revenues that are not considered to be available to liquidate liabilities of the current period. Governmental funds also report unearned revenue recognition in connection with resources that have been received, but not yet earned.

The amounts reported in the governmental funds for the year ended June 30, 2016 are as follows:

CAFR Fund Name	Unearned	Unavailable
General Fund	\$ 1,648,953	\$ 367,239
Highway User Revenue Fund	2,000	-
Transportation Improvement Fund	181,282	-
Nonmajor Governmental Funds	564,578	-
	<u>\$ 2,396,813</u>	<u>\$ 367,239</u>

NOTE 4 – CAPITAL ASSETS

Capital assets activity for the year ended June 30, 2016, was as follows:

	Beginning Balance	Increases	Decreases	Ending Balance
Governmental activities:				
Not being depreciated:				
Land and land improvements	\$ 33,609,071	\$ 296,121	\$ (58,072)	\$ 33,847,120
Parks	10,256,905	-	-	10,256,905
Construction in process	10,039,959	6,389,712	(5,918,935)	10,510,736
Total not being depreciated	<u>53,905,935</u>	<u>6,685,833</u>	<u>(5,977,007)</u>	<u>54,614,761</u>
Other capital assets:				
Buildings and improvements	191,939,642	20,902,961	(5,722,033)	207,120,570
Improvements other than buildings	18,037,993	7,373,849	-	25,411,842
Equipment and vehicles	44,299,418	9,389,502	(4,520,175)	49,168,745
Infrastructure	398,050,472	3,503,324	-	401,553,796
Total other capital assets	<u>652,327,525</u>	<u>41,169,636</u>	<u>(10,242,208)</u>	<u>683,254,953</u>
Total assets before depreciation	<u>706,233,460</u>	<u>47,855,469</u>	<u>(16,219,215)</u>	<u>737,869,714</u>
Accumulated depreciation:				
Building and improvements	(56,425,631)	(6,552,952)	2,477,147	(60,501,436)
Improvements other than buildings	(5,388,257)	(812,217)	-	(6,200,474)
Equipment and vehicles	(33,157,059)	(3,226,576)	3,608,792	(32,774,843)
Infrastructure	(179,574,807)	(15,372,741)	-	(194,947,548)
Total accumulated depreciation	<u>(274,545,754)</u>	<u>(25,964,486)</u>	<u>6,085,939</u>	<u>(294,424,301)</u>
Net Capital Assets - Governmental Activities	<u>\$ 431,687,706</u>	<u>\$ 21,890,983</u>	<u>\$ (10,133,276)</u>	<u>\$ 443,445,413</u>

NOTES TO FINANCIAL STATEMENTS

Depreciation was charged by function as follows:

General government	\$ 1,677,433
Public safety	2,887,335
Public works and streets	17,943,338
Community development	22,889
Culture and recreation	<u>3,433,491</u>

Total governmental activities depreciation expense \$ 25,964,486

	Beginning Balance	Increases	Decreases	Ending Balance
Business-type activities:				
Not being depreciated:				
Land	\$ 5,140,050	\$ -	\$ -	\$ 5,140,050
Water Rights	7,929,385	654,585	-	8,583,970
Construction in progress	770,229	8,998,143	(231,811)	9,536,561
Total not being depreciated	<u>13,839,664</u>	<u>9,652,728</u>	<u>(231,811)</u>	<u>23,260,581</u>
Other capital assets:				
Buildings and system	364,654,681	1,116,914	-	365,771,595
Improvements other than buildings	893,499	485,237	-	1,378,736
Vehicles and equipment	10,928,027	2,984,991	(943,891)	12,969,127
Total other capital assets	<u>376,476,207</u>	<u>4,587,142</u>	<u>(943,891)</u>	<u>380,119,458</u>
Total assets before depreciation	<u>390,315,871</u>	<u>14,239,870</u>	<u>(1,175,702)</u>	<u>403,380,039</u>
Accumulated depreciation:				
Buildings and system	(78,475,593)	(9,738,092)	-	(88,213,685)
Improvements other than buildings	(74,458)	(54,045)	-	(128,503)
Vehicles and equipment	(6,254,742)	(1,232,248)	927,192	(6,559,798)
Total accumulated depreciation	<u>(84,804,793)</u>	<u>(11,024,385)</u>	<u>927,192</u>	<u>(94,901,986)</u>
Net capital assets - business activities	<u>\$ 305,511,078</u>	<u>\$ 3,215,485</u>	<u>\$ (248,510)</u>	<u>\$ 308,478,053</u>

Depreciation was charged by function as follows:

Water	\$ 2,909,051
Sewer	7,251,355
Sanitation	<u>863,979</u>

Total business-type activities depreciation expense \$ 11,024,385

During the current fiscal year, the Sewer Fund capitalized net interest costs of \$125,620. Total interest expense in the Sewer Fund before capitalization was \$2,099,367.

NOTES TO FINANCIAL STATEMENTS

NOTE 5 - DEVELOPER AGREEMENTS

The City of Surprise has entered into agreements with developers for infrastructure related to commercial and residential development. The developers construct the infrastructure and convey the assets to the City. Based on the terms of the agreements, over a designated period of time, the City pays the developers for the infrastructure with collections of impact fees and other specified revenues, up to the maximum amount per agreement. Commitments to reimburse developers under these agreements are not currently recognized until the requirements of the agreements are met. If the term of the agreement expires before the maximum amount has been repaid, the City has no further obligation to continue making payments under the agreement.

Development agreements related to water system infrastructure will be reimbursed using water system impact fees and water resource impact fees. Total water system infrastructure value conveyed is \$29,197,251. Depending on the terms of the specific agreement, this value is eligible for reimbursement during the next seventeen years. Once an agreement expires, water system and water resource impact fees are no longer eligible for developer reimbursement. As of June 30, 2016, the City has reimbursed \$11,593,662, leaving a potential remaining balance of \$17,603,589.

Development agreements related to wastewater system infrastructure will be reimbursed using specified sales tax revenues. The total net value reimbursable for wastewater system infrastructure is \$14,002,595. Depending on the terms of the specific agreements, this value is eligible for reimbursement over the next thirty four years. Once the agreements expire, the remaining unpaid balance of these infrastructure costs is no longer subject to repayment. As of June 30, 2016, the amount the City has reimbursed is \$77,020, leaving a potential remaining balance of \$13,925,575.

Infrastructure installed in connection with development agreements related to transportation will be reimbursed using a portion of sales tax collections as prescribed in the agreements. The total net reimbursable value for this infrastructure is \$65,603,304 at June 30, 2016. Depending on the terms of the specific agreements, this value is eligible for reimbursement over the next thirty four years. Once the agreements expire, no further developer reimbursement of the unpaid balance is required. As of June 30, 2016, the City has reimbursed \$686,006 to developers, leaving a potential remaining balance of \$64,917,298.

Development agreements related to park infrastructure will be reimbursed using park impact fees. Total park infrastructure value conveyed is \$4,777,882. Depending on the terms of the specific agreement, this value is eligible for reimbursement during the next four years. Once an agreement expires, park impact fees are no longer eligible for developer reimbursement. As of June 30, 2016, the City has reimbursed \$66,519, leaving a potential balance remaining of \$4,711,363.

Development agreements related to fire infrastructure will be reimbursed using fire development impact fees. The total net value reimbursable for fire infrastructure is \$496,663. Depending on the terms of the specific agreement, this value is eligible for reimbursement during the next four years. Once the agreements expire, the remaining unpaid balance of these infrastructure costs is no longer subject to repayment. As of June 30, 2016, the amount the City has reimbursed is \$302,916, leaving a potential remaining balance of \$193,747.

In addition, the City has entered into a number of developer agreements for infrastructure that has not yet been conveyed to the City. The total cost to be incurred under these agreements is currently undeterminable.

NOTES TO FINANCIAL STATEMENTS

NOTE 6 – CONSTRUCTION COMMITMENTS

City of Surprise has active construction projects as of June 30, 2016. At year end, the City commitments with contractors are as follows:

Project	Spent-to-Date	Remaining Commitment	Funding Source
Greenway Rd. Improvements	\$ 1,832,043	\$ 280,980	General Capital Fund
Greenway Rd. Improvements	375,097	382,573	Sewer Operations
Bell Rd Sidewalks E of Grant	1,759,312	5,069	General Capital Fund
Dove Valley Parkway 163rd-179th	638,933	1,258	General Capital Fund
Martin Acre Flood Control	150,000	44,300	General Capital Fund
Site and Security Improvements	58,679	223	Water Operations fund
107th & Union Hills Drainage	309,215	2,583,250	General Capital Fund
Peoria (Sarvils to Reems)	178,718	806	Transportation Improvement
City Hall Reclaim Connections	50,760	44,937	Water Operations fund
Cactus Rd 175th to Cotton Ln	93,206	29,486	General Capital Fund
Cactus Rd 175th to Cotton Ln	188,304	54,513	Transportation Improvement
SPA 1 Effluent Strg Reser Covers	2,283,930	68,350	WTR Resources Sys Dev Fee SPA1
Replace Financial Software	2,069,752	944,698	General Capital Fund
Replace Financial Software	72,018	120,537	Water Operations fund
Replace Financial Software	98,363	160,716	Sewer Operations
Replace Financial Software	72,018	120,537	Sanitation Operations Fund
Booster Station Bell Rd Lake	-	10,000	Highway User
Dewatering Centrifuge #1	216,495	322,003	Sewer SPA1 Dev Fee 2014 Law
Cactus S. Side Railroad Track/Litchfield	25,515	217,147	Water Operations fund
Cactus S. Side Railroad Track/Litchfield	94,256	745,786	Sewer Operations
Cactus S. Side Railroad Track/Litchfield	12,758	113,744	General Capital Fund
Jomax 147 to 132 Pave Dirt Rd	426,372	2,054	General Capital Fund
Median & ROW Landscaping	562,756	173,476	Highway User
City Entry Monuments	49,173	760	General Capital Fund
New Public Works Yard (North)	67,189	15,311	Sanitation Operations Fund
New Public Works Yard (North)	69,189	15,311	Public Works Dev Fee
SPA 1 WRF N Entry Gate and Wall	167,034	20,452	Sewer Operations
Litchfield E DS Cactus/Desert CV	1,107,655	26,057	Sewer Operations
Solar Biosolid Dryer	96,929	26,525	Sewer Operations
SPA Influent Ln Hydr Rehab	198,203	109,095	Sewer Operations
Greenway Road Lift Station Rehab	53,852	264,471	Sewer Operations
Elec Service Upgrade at Techcelerator	221,479	106,600	General Capital Fund
Jerry Street and Rimrock Drainage	124,424	62,229	General Capital Fund
Electric Panel Split	18,242	110,364	General
AZ Techcelerator Renovation	493,166	8,325	General
Reems Fiber Opt Waddell-Peoria	36,592	21,337	General Capital Fund
Reems Fiber Opt Waddell-Peoria	56,923	31,592	Public Works Dev Fee
Hydraulic Protection	124,393	9,741	Water Operations fund
SPA 1 WRF Conference and Training Ctr	1,843,580	472,349	Water Operations fund
SPA 1 WRF Conference and Training Ctr	1,888,471	1,207,641	Sewer Operations
Pumper 4029 Replacement	299,690	303,178	Vehicle Replacement Fund
Total	\$ 18,484,684	\$ 9,237,781	

NOTES TO FINANCIAL STATEMENTS

NOTE 7 - LONG-TERM DEBT & OTHER PAYABLES

MUNICIPAL PROPERTY CORPORATION BONDS

The City of Surprise Municipal Property Corporation (MPC) issued, for the purpose of constructing the South Wastewater Treatment Plant, the Wastewater Development Impact Fee and Utility Revenue Bonds, Series 2007, maturing in 2031, with an original issue amount of \$50,675,000 and a balance outstanding at June 30, 2016 of \$37,585,000. The Bonds are secured by a pledge of the City's wastewater development impact fee collections as well as a subordinate pledge of wastewater utility revenue collections, net of specified operating expenses. The wastewater development impact fees and utility revenue collections are recorded in the Sewer Fund. Required reserves for the MPC issuance have been met by the City. Principal and interest paid and system net revenues for the current year were \$3,638,325 and \$8,192,673 respectively. Next year's principal and interest payments will be \$3,637,668 and will constitute approximately 44% of the current year's system net revenues. Of the total system net revenues, \$1,597,179 are development impact fee revenues that have been specifically designated for debt service payments per the bond issuance statement. The remaining \$6,595,494 represents net revenues from wastewater operations during the year, and is available to meet debt service payment obligations.

PLEDGED REVENUE OBLIGATIONS

In 2015, the City of Surprise issued Pledged Revenue Obligations and Pledged Revenue Refunding Obligations secured by a pledge on excise tax revenues and state shared revenues. A portion of the issuance was for the purpose of refunding the former MPC Series 2003 Bonds, and the remainder was for the construction of stadium improvements.

The issuance requires excise tax and state shared revenues to be maintained at a minimum of 3.0 times the combined debt service requirement payable. The debt service coverage ratio at June 30, 2016 (revenues to debt service payable) is 21.7.

The Pledged Revenue Obligations, Series 2015, were issued in the amount of \$17,385,000, and have an outstanding principal balance at June 30, 2016 of \$16,530,000. Proceeds of these obligations are designated for the construction of stadium improvements. The obligations are payable solely from pledged revenues and are payable through 2030. Principal and interest payments and pledged revenues for the current year were \$1,584,509 and \$91,842,475, respectively. Next year's principal and interest payments of \$1,583,000 constitute approximately 1.7% of the current year pledged revenue.

The Pledged Revenue Refunding Obligations, Series 2015, were issued in the amount of \$19,280,000 and have an outstanding principal balance at June 30, 2016 of \$17,450,000. The proceeds of these obligations were used to refund (extinguish the debt) of the former MPC Series 2003 Bonds and pay costs of issuance. The refunding obligations are payable solely from pledged revenue and mature in 2024. Principal and interest payable and pledged revenues for the current year were \$2,653,860 and \$91,842,475, respectively. Next year's principal and interest payments totaling \$2,656,051 constitute approximately 2.9% of current year pledged revenue.

COMMUNITY FACILITIES DISTRICT BONDS

Community Facilities District (CFD) Bonds are special purpose government entity debt which the City Council may issue under Arizona law to (among other things) acquire and improve public infrastructure.

Subsequent to June 30, 2016, the Marley Park Community Facilities District advance refunded \$6,065,000 of its bonds outstanding and issued an additional \$5,300,000 in new general obligation bonds.

NOTES TO FINANCIAL STATEMENTS

Long-term debt as of June 30, 2016 is comprised of the following:

Classified in Governmental Activities on the Government-wide Financial Statements:

Revenue Obligations	Long-Term Debt Outstanding
2015, Pledged Revenue Obligation (issued June 23, 2015) due in annual installments of \$855,000 to \$1,505,000 through July 1, 2030; interest at 3 percent to 5 percent. Original issue amount \$17,385,000.	\$ 16,530,000
2015, Pledged Revenue Refunding Obligation (issued June 23, 2015) due in annual installments of \$1,830,000 to \$2,525,000 through July 1, 2024; interest at 3 percent to 5 percent. Original issue amount \$19,280,000. 69.75 percentage of this issue pertains to governmental activities.	<u>12,171,375</u>
Total Revenue Obligations	<u>28,701,375</u>
Community Facilities Districts General Obligation Bonds	
2006 Marley Park Community Facilities District General Obligation bonds due in annual installments of \$30,000 to \$95,000 beginning July 15, 2007 through July 15, 2031; interest at 4.85 percent to 5.30 percent. Original issue amount \$1,365,000.	1,005,000
2007 Marley Park Community Facilities District General Obligation bonds due in annual installments of \$80,000 to \$375,000 beginning July 15, 2008 through July 15, 2032; interest at 4.35 percent to 6.10 percent. Original issue amount \$3,950,000.	3,050,000
2008 Marley Park Community Facilities District General Obligation bonds due in annual installments of \$60,000 to \$630,000 beginning July 15, 2009 through July 15, 2033; interest at 3.80 percent to 7.00 percent. Original issue amount \$3,395,000.	<u>2,830,000</u>
Total Community Facilities Districts General Obligation Bonds Outstanding	<u>6,885,000</u>
Total Long-Term Debt Payable Recorded in Governmental Activities	<u><u>\$ 35,586,375</u></u>

NOTES TO FINANCIAL STATEMENTS

Classified in Business-type Activities on the Government-wide Financial Statements:

Revenue Obligations

Long-Term Debt Outstanding

2015, Pledged Revenue Refunding Obligation (issued June 23, 2015) due in annual installments of \$1,830,000 to \$2,525,000 through July 1, 2024; interest at 3 percent to 5 percent. Original issue amount \$19,280,000. 30.25 percentage of this issue pertains to business-type activities.

\$ 5,278,625

Municipal Property Corporation Bonds

2007, Municipal Property Corporation Wastewater Development Impact Fee and Subordinate Lien Wastewater Utility Revenue Bonds (issued May 1, 2007) due in installments of \$4,675,000 to \$25,000,000 through October 1, 2031; interest at 4.25 percent to 4.90 percent. Original issue amount \$50,675,000.

37,585,000

Total Bonds Payable Recorded in Business-type Activities

42,863,625

Total Long-Term Bonds Payable

\$ 78,450,000

NOTES TO FINANCIAL STATEMENTS

The following is a summary of long-term liabilities for the year ended June 30, 2016:

	Beginning Balance	Additions	Reductions	Ending Balance	Amounts Due Within One Year
Governmental activities:					
City of Surprise, Series 2015 Pledged revenue obligations					
\$30,832,800 (\$36,665,000 issued)	\$ 30,832,800	\$ -	\$ (2,131,425)	\$ 28,701,375	\$ 2,223,738
For issuance premium 2015	3,365,079	-	(296,420)	3,068,659	-
Community Facilities Districts					
Series 2006 Bonds, \$1,365,000 issued	1,050,000	-	(45,000)	1,005,000	45,000
Series 2007 Bonds, \$3,950,000 issued	3,160,000	-	(110,000)	3,050,000	115,000
Series 2008 Bonds, \$3,395,000 issued	2,905,000	-	(75,000)	2,830,000	85,000
	<u>7,115,000</u>	<u>-</u>	<u>(230,000)</u>	<u>6,885,000</u>	<u>245,000</u>
Total governmental obligation bonds	<u>41,312,879</u>	<u>-</u>	<u>(2,361,425)</u>	<u>38,655,034</u>	<u>2,468,738</u>
Compensated absences	<u>5,728,758</u>	<u>4,422,590</u>	<u>(4,148,381)</u>	<u>6,002,967</u>	<u>2,521,247</u>
Contracts and developer payable	<u>2,081,974</u>	<u>2,750,026</u>	<u>(1,844,404)</u>	<u>2,987,596</u>	<u>2,891,971</u>
Total governmental activities debt	<u>\$ 49,123,611</u>	<u>\$ 7,172,616</u>	<u>\$ (8,354,210)</u>	<u>\$ 47,645,597</u>	<u>\$ 7,881,956</u>
	Ending Balance	Additions	Reductions	Ending Balance	Amounts Due Within One Year
Business-type activities:					
City of Surprise, Series 2015 Pledged revenue obligations					
\$5,832,200 (\$36,665,000 issued)	\$ 5,832,200	\$ -	\$ (553,575)	\$ 5,278,625	\$ 576,263
General municipal property corporation fund obligation					
Series 2007 Bonds, \$50,675,000 issued	39,365,000	-	(1,780,000)	37,585,000	1,865,000
For issuance premium 2015	703,371	-	(78,152)	625,219	-
Total business-type activities bonds	<u>45,900,571</u>	<u>-</u>	<u>(2,411,727)</u>	<u>43,488,844</u>	<u>2,441,263</u>
Compensated absences	<u>763,288</u>	<u>664,717</u>	<u>(620,540)</u>	<u>807,465</u>	<u>339,135</u>
Contracts and developer payable	<u>428,855</u>	<u>209,824</u>	<u>(428,855)</u>	<u>209,824</u>	<u>209,824</u>
Total business-type activities debt	<u>\$ 47,092,714</u>	<u>\$ 874,541</u>	<u>\$ (3,461,122)</u>	<u>\$ 44,506,133</u>	<u>\$ 2,990,222</u>

NOTES TO FINANCIAL STATEMENTS

The following is a summary of debt service requirements for the year ended June 30, 2016. Deferred amounts are not included:

Year Ended June 30	Governmental Activities									
	Refunding/Stadium Imp 2015		Marley Park CFD 2006		Marley Park CFD 2007		Marley Park CFD 2008		Total	
	Principal	Interest	Principal	Interest	Principal	Interest	Principal	Interest	Principal	Interest
2017	\$ 2,223,738	\$ 1,211,857	\$ 45,000	\$ 52,756	\$ 115,000	\$ 183,844	\$ 85,000	\$ 193,604	\$ 2,468,738	\$ 1,642,061
2018	2,311,050	1,122,908	50,000	50,416	120,000	177,634	85,000	188,674	2,566,050	1,539,632
2019	2,382,900	1,053,577	50,000	47,816	130,000	170,436	90,000	183,574	2,652,900	1,455,403
2020	2,473,700	958,260	55,000	45,215	135,000	162,635	100,000	177,724	2,763,700	1,343,834
2021	2,549,037	884,050	55,000	42,356	145,000	154,534	105,000	171,226	2,854,037	1,252,166
2022-2026	11,000,950	2,468,040	325,000	165,231	870,000	630,477	635,000	743,053	12,830,950	4,006,801
2027-2031	5,760,000	569,800	425,000	70,228	1,160,000	334,888	885,000	489,650	8,230,000	1,464,566
2032-2033	-	-	-	-	375,000	22,876	845,000	103,250	1,220,000	126,126
Total	<u>\$ 28,701,375</u>	<u>\$ 8,268,492</u>	<u>\$ 1,005,000</u>	<u>\$ 474,018</u>	<u>\$ 3,050,000</u>	<u>\$ 1,837,324</u>	<u>\$ 2,830,000</u>	<u>\$ 2,250,755</u>	<u>\$ 35,586,375</u>	<u>\$ 12,830,589</u>

Year Ended June 30	Business-Type Activities					
	Refunding/Stadium Imp 2015		2007 MPC		Total	
	Principal	Interest	Principal	Interest	Principal	Interest
2017	\$ 576,263	\$ 227,193	\$ 1,865,000	\$ 1,772,668	\$ 2,441,263	\$ 1,999,861
2018	598,950	204,142	1,950,000	1,683,015	2,548,950	1,887,157
2019	617,100	186,174	2,045,000	1,589,132	2,662,100	1,775,306
2020	641,300	161,490	2,140,000	1,490,785	2,781,300	1,652,275
2021	660,962	142,250	2,240,000	1,387,855	2,900,962	1,530,105
2022-2026	2,184,050	221,959	10,915,000	5,365,728	13,099,050	5,587,687
2027-2031	-	-	13,350,000	2,452,940	13,350,000	2,452,940
2032-2033	-	-	3,080,000	75,460	3,080,000	75,460
Total	<u>\$ 5,278,625</u>	<u>\$ 1,143,208</u>	<u>\$ 37,585,000</u>	<u>\$ 15,817,583</u>	<u>\$ 42,863,625</u>	<u>\$ 16,960,791</u>

NOTES TO FINANCIAL STATEMENTS

Contracts Payable

General Government Activities

A balance of \$2,987,596 is owed based on improvements made by developers per development agreements for various infrastructure items the City will own and amounts owed to contractors for the retainage of on-going projects.

Business Type Activities

A balance of \$209,824 is owed based on improvements made by developers per development agreements for various equipment and infrastructure items the City will own and amounts owed to contractors for the retainage of on-going projects.

Legal Debt Limit

The Arizona Constitution provides that the general obligation bonded indebtedness for a city may not exceed twenty percent of the net secondary assessed valuation of the taxable property of the city for projects for purposes of water, wastewater, artificial light, open space preserves, parks and recreational facilities, public safety, law enforcement, fire and emergency services facilities, streets, and transportation facilities. Outstanding general obligation bonded indebtedness for all other purposes may not exceed six percent of the City's net secondary assessed valuation. The following summarizes the City of Surprise, Arizona's legal general obligation bonded debt borrowing capacity at June 30, 2016:

20% Limitation		6% Limitation	
20% Constitutional Limit	\$ 206,381,949	6% Constitutional Limit	\$ 61,914,585
Less General Obligation 20% Bonds Outstanding	<u>-</u>	Less General Obligation 6% Bonds Outstanding	<u>-</u>
Available 20% Limitation Borrowing Capacity	<u>\$ 206,381,949</u>	Available 6% Limitation Borrowing Capacity	<u>\$ 61,914,585</u>

OPERATING LEASES

The City leases copiers, trash compactors, and land under certain cancelable and non-cancelable operating leases expiring at various dates. Operating leases do not give rise to property rights or lease obligations (long-term debt), and therefore the results of the lease agreements are not reflected in the City's statement of net position. Lease expense for the fiscal year ended June 30, 2016 was \$89,712.

The following is a schedule of the future minimum lease payments on the non-cancelable operating leases:

Year Ending June 30:	
2017	\$ 38,248
2018	15,865
2019	<u>1,902</u>
Total minimum payments required	<u>\$ 56,015</u>

NOTES TO FINANCIAL STATEMENTS

Operating Lease Revenue

The City leases various City-owned properties and buildings under cancelable long-term lease agreements. The carrying value of leased assets is \$3,860,674 (cost of \$7,070,069 less accumulated depreciation of \$3,209,395). The lease properties and building are included as capital assets in the government-wide financial statements. Operating lease revenues for fiscal year 2016 were \$565,221.

NOTE 8 - RETIREMENT PLANS

Cost-Sharing and Agent Multiple Employer Pension Plans

The City contributes to the Arizona State Retirement System (ASRS), the Public Safety Personnel Retirement System (PSPRS) for police officers and firefighters, and the Elected Officials Retirement Plan (EORP) for elected officials and judges. The plans are component units of the State of Arizona.

At June 30, 2016, the City reported the following aggregate amounts related to pensions for all plans to which it contributes:

Statement of Net Position and Statement of Activities	Governmental Activities	Business-Type Activities	Total
Net pension liabilities	\$ 66,284,151	\$ 10,320,778	\$ 76,604,929
Deferred outflows of resources	22,884,246	1,909,864	24,794,110
Deferred inflows of resources	5,068,426	871,577	5,940,003
Pension expense	8,400,638	299,858	8,700,496

The City reported accrued payroll and employee benefits of \$165,305 for outstanding pension contribution amounts payable to all pension plans for the year ended June 30, 2016. Also, the City reported \$7,623,644 of pension expenditures in the governmental funds related to all pension plans to which it contributes.

Arizona State Retirement System

Plan Descriptions – City employees not covered by the other pension plans described on the following pages participate in the Arizona State Retirement System (ASRS). The ASRS administers a cost-sharing, multiple-employer defined benefit pension plan; a cost-sharing, multiple-employer defined benefit health insurance premium benefit (OPEB); and a cost-sharing, multiple-employer defined benefit long-term disability (OPEB) plan. The Arizona State Retirement System Board governs the ASRS according to the provisions of A.R.S. Title 38, Chapter 5, Articles 2 and 2.1. The ASRS issues a publicly available financial report that includes its financial statements and required supplementary information. The report is available on its website at www.azasrs.gov.

Benefits Provided – The ASRS provides retirement, health insurance premium supplement, long-term disability, and survivor benefits. State statute establishes benefit terms. Retirement benefits are calculated on the basis of age, average monthly compensation, and service credit as follows:

NOTES TO FINANCIAL STATEMENTS

	Retirement	
	Initial Membership Date:	
	Before July 1, 2011	On or After July 1, 2011
Years of service and age required to receive benefit	Sum of years and age equals 80 10 years, age 62 5 years, age 50* any years, age 65	30 years, age 55 25 years, age 60 10 years, age 62 5 years, age 50* any years, age 65
Final average salary is based on	Highest 36 consecutive months of last 120 months	Highest 60 consecutive months of last 120 months
Benefit percent per year of service	2.1% to 2.3 %	2.1% to 2.3 %

* With actuarially reduced benefits

Retirement benefits for members who joined the ASRS prior to September 13, 2013, are subject to automatic cost-of-living adjustments based on excess investment earnings. Members with a membership date on or after September 13, 2013, are not eligible for cost-of-living adjustments. Survivor benefits are payable upon a member's death. For retired members, the survivor benefit is determined by the retirement benefit option chosen. For all other members, the beneficiary is entitled to the member's account balance that includes the member's contributions and employer's contributions, plus interest earned.

Contributions – In accordance with state statutes, annual actuarial valuations determine active member and employer contribution requirements. The combined active member and employer contribution rates are expected to finance the costs of benefits employees earn during the year, with an additional amount to finance any unfunded accrued liability. For the year ended June 30, 2016, active ASRS members were required by statute to contribute at the actuarially determined rate of 11.47 percent (11.35 percent for retirement and 0.12 percent for long-term disability) of the members' annual covered payroll, and the City was required by statute to contribute at the actuarially determined rate of 11.47 percent (10.85 percent for retirement, 0.50 percent for the health insurance premium benefit, and 0.12 percent for long-term disability) of the active members' annual covered payroll.

In addition, the City was required by statute to contribute at the actuarially determined rate of 9.36 percent (9.17 percent for retirement, 0.13 percent for health insurance premium benefit, and 0.06 percent for long-term disability) of annual covered payroll of retired members who worked for the City in positions that would typically be filled by an employee who contributes to the ASRS. The City's contributions to the pension plan for the year ended June 30, 2016, were \$3,569,994. The City's contributions for the current and two preceding years for OPEB, all of which were equal to the required contributions, were as follows:

	Health Benefit Supplement Fund	Long-Term Disability Fund
<u>Year Ended June 30,</u>		
2016	\$ 164,158	\$ 39,434
2015	178,990	36,405
2014	162,104	64,842

During the fiscal year ended June 30, 2016, the City paid for ASRS pension and OPEB contributions as follows: 72 percent from the General Fund, 25 percent from major funds, and 3 percent from other funds.

NOTES TO FINANCIAL STATEMENTS

Pension Liability – At June 30, 2016, the City reported a liability of \$50,841,272 for its proportionate share of the ASRS' net pension liability. The net pension liability was measured as of June 30, 2015. The total pension liability used to calculate the net pension liability was determined using update procedures to roll forward the total pension liability from an actuarial valuation as of June 30, 2014, to the measurement date of June 30, 2015.

The City's reported liability at June 30, 2016, increased by \$7,861,105 from the City's prior year liability of \$42,980,167 because of changes in the ASRS' net pension liability and the City's proportionate share of that liability. The ASRS' publicly available financial report provides details on the change in the net pension liability.

The City's proportion of the net pension liability was based on the City's FY 2015 contributions. The City's proportion measured as of June 30, 2015, was 0.326400 percent, which was an increase of 0.035927 from its proportion measured as of June 30, 2014.

Pension Expense and Deferred Outflows/Inflows of Resources – For the year ended June 30, 2016, the City recognized pension expense for ASRS of \$4,872,310. At June 30, 2016, the City reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ 1,387,348	\$ 2,664,134
Net difference between projected and actual earnings on pension plan investments	-	1,629,350
Changes in proportion and differences between City contributions and proportionate share of contributions	4,450,848	-
City contributions subsequent to the measurement date	3,569,994	-
Total	<u>\$ 9,408,190</u>	<u>\$ 4,293,484</u>

The \$3,569,994 reported as deferred outflows of resources related to ASRS pensions resulting from City contributions subsequent to the measurement date will be recognized as a reduction of the net pension liability in the year ended June 30, 2017. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to ASRS pensions will be recognized in pension expense as follows:

Year Ended June 30,	Amount
2017	\$ 1,053,287
2018	119,516
2019	(804,277)
2020	1,176,186

NOTES TO FINANCIAL STATEMENTS

Actuarial Assumptions – The significant actuarial assumptions used to measure the total pension liability are as follows:

Actuarial valuation date	June 30, 2014
Actuarial roll forward date	June 30, 2015
Actuarial cost method	Entry age normal
Investment rate of return	8%
Projected salary increases	3 - 6.75%
Inflation	3%
Permanent benefit increase	Included
Mortality rates	1994 GAM Scale BB

Actuarial assumptions used in the June 30, 2014 valuation were based on the results of an actuarial study for the 5-year period ended June 30, 2012.

The long-term expected rate of return on ASRS pension plan investments was determined to be 8.79 percent using a building block method in which best-estimate ranges of expected future real rates of return (expected returns, net of pension plan investment expense and inflation) are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation. The target allocation and best estimates of arithmetic real rates of return for each major asset class are summarized in the following table:

Asset Class	Target Allocation	Real Return Arithmetic Basis
Equity	58%	6.79%
Fixed Income	25%	3.70%
Real Estate	10%	4.25%
Multi-asset	5%	3.41%
Commodities	2%	3.93%
Total	100%	

Discount Rate – The discount rate used to measure the ASRS total pension liability was 8 percent, which is less than the long-term expected rate of return of 8.79 percent. The projection of cash flows used to determine the discount rate assumed that contributions from participating employers will be made based on the actuarially determined rates based on the ASRS Board's funding policy, which establishes the contractually required rate under Arizona statutes. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

NOTES TO FINANCIAL STATEMENTS

Sensitivity of the City’s Proportionate Share of the ASRS Net Pension Liability to Changes in the Discount Rate – The following table presents the City’s proportionate share of the net pension liability calculated using the discount rate of 8 percent, as well as what the City’s proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1 percentage point lower (7 percent) or 1 percentage point higher (9 percent) than the current rate.

	1% Decrease (7%)	Current Discount Rate (8%)	1% Increase (9%)
City's proportionate share of the net pension liability	\$ 66,619,441	\$ 50,841,272	\$ 40,028,056

Pension Plan Fiduciary Net Position – Detailed information about the pension plan’s fiduciary net position is available in the separately issued ASRS financial report.

Public Safety Personnel Retirement System (PSPRS)

Plan Descriptions—City police employees and City firefighters who are regularly assigned hazardous duty participate in the Public Safety Personnel Retirement System (PSPRS). The PSPRS administers an agent multiple-employer defined benefit pension plan and an agent multiple-employer defined benefit health insurance premium benefit (OPEB) plan (agent plans). A seven-member board known as the Board of Trustees and the participating local boards govern the PSPRS according to the provisions of A.R.S. Title 38, Chapter 5, Article 4.

The PSPRS issues publicly available financial reports that include their financial statements and required supplementary information. The reports are available on the PSPRS website at www.psprs.com.

NOTES TO FINANCIAL STATEMENTS

Benefits Provided — The PSPRS provides retirement, health insurance premium supplement, disability, and survivor benefits. State statute establishes benefits terms. Retirement, disability, and survivor benefits are calculated on the basis of age, average monthly compensation, and service credit as follows:

PSPRS	Initial Membership Date:	
	Before January 1, 2012	On or After January 1, 2012
<u>Retirement and Disability</u>		
Years of service	20 years, any age	25 years, age 52.5
and age required to receive benefit	15 years, age 62	
Final average salary is based on	Highest 36 consecutive months of last 20 years	Highest 60 consecutive months of last 20 years
Benefit percent		
Normal Retirement	50% less 2.0% for each year of credited service less than 20 years OR plus 2.0% to 2.5% for each year of credited service over 20 years, not to exceed 80%	2.5% per year of credited service, not to exceed 80%
Accidental Disability Retirement	50% or normal retirement, whichever is greater	
Catastrophic Disability Retirement	90% for the first 60 months then reduced to either 62.5% or normal retirement, whichever is greater	
Ordinary Disability Retirement	Normal retirement calculated with actual years of credited service or 20 years of credited service, whichever is greater, multiplied by years of credited service (not to exceed 20 years) divided by 20	
<u>Survivor Benefit</u>		
Retired Members	80-100% of retired member's pension benefit	
Active Members	80-100% of accidental disability retirement benefit or 100% of average monthly compensation if death was the result of injuries received on the job	

Retirement and survivor benefits are subject to automatic cost-of-living adjustments based on excess investment earning. In addition, from and after December 31, 2015, the Legislature may enact permanent one-time benefit increases after a Joint Legislative Budget Committee analysis of the increase's effects on the plan. PSPRS also provides temporary disability benefits of 50 percent of the member's compensation for up to 12 months.

Employees Covered by Benefit Terms – At June 30, 2016, the following employees were covered by the agent pension plans' benefit terms:

	PSPRS Police	PSPRS Fire
Inactive employees or beneficiaries currently receiving benefits	26	8
Inactive employees entitled to but not yet receiving benefits	18	4
Active employees	121	108
Total	<u>165</u>	<u>120</u>

NOTES TO FINANCIAL STATEMENTS

Contributions and Annual OPEB Cost – State statutes establish the pension contribution requirements for active PSPRS employees. In accordance with state statutes, annual actuarial valuations determine employer contribution requirements for PSPRS pension and health insurance premium benefits. The combined active member and employer contribution rates are expected to finance the costs of benefits employees earn during the year, with an additional amount to finance any unfunded accrued liability. Contributions rates for the year ended June 30, 2016, are indicated below. Rates are a percentage of active members’ annual covered payroll.

	PSPRS Police	PSPRS Fire
Active members - pension	11.65%	11.65%
City		
Pension	20.26%	15.58%
Health insurance premium benefit	0.47%	0.38%

In addition, statute required the City to contribute at the actuarially determined rate of 28.62 percent of annual covered payroll of retired members who worked for the City in positions that an employee who contributes to the PSPRS would typically fill.

For the agent plans, the City’s contributions to the pension plan and annual OPEB cost and contributions for the health insurance premium benefit for the year ended June 30, 2016, were:

	PSPRS Police	PSPRS Fire
Pension		
Contributions made	\$ 2,301,028	\$ 1,716,087
Health insurance premium benefit		
Annual OPEB cost	52,449	40,464
Contributions made	52,449	40,464

During the fiscal year 2016, the City paid for PSPRS pension and OPEB contributions 100 percent from the General Fund.

Pension Liability – At June 30, 2016, the City reported the following net pension liabilities:

	Net Pension Liability
PSPRS Police	\$ 16,985,143
PSPRS Fire	7,502,484

The net pension liabilities were measured as of June 30, 2015, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of that date.

In May 2016 voters approved Proposition 124 that authorized certain statutory adjustments to PSPRS’ automatic cost-of-living adjustments. The statutory adjustments change the basis for future cost-of-living adjustments from excess investment earnings to the change in the consumer price index, limited to a maximum annual increase of 2 percent. The change in the City’s net pension liability as a result of the statutory adjustments is not known.

NOTES TO FINANCIAL STATEMENTS

Pension Actuarial Assumptions – The significant actuarial assumptions used to measure the total pension liability for PSPRS is as follows:

Actuarial valuation date	June 30, 2015
Actuarial cost method	Entry age normal
Investment rate of return	7.85%
Projected salary increases	4.0%-8.0%
Inflation	4.0%
Permanent benefit increase	Included
Mortality rates	RP-2000 mortality table (adjusted by 105% for both males and females)

Actuarial assumptions used in the June 30, 2015, valuation were based on the results of an actuarial experience study for the 5-year period ended June 30, 2011.

The long-term expected rate of return on PSPRS pension plan investments was determined to be 7.85 percent using a building-block method in which best-estimate ranges of expected future real rates of return (expected returns, net of pension plan investment expenses and inflation) are developed for each major asset class. The target allocation and best estimates of geometric real rates of return for each major asset class are summarized in the following table:

PSPRS Asset Class	Target	Long-Term
	Allocation	Expected Geometric Real Rate of Return
Short Term Investments	2%	0.75%
Absolute Return	5%	4.11%
Risk Parity	4%	5.13%
Fixed Income	7%	2.92%
Real Assets	8%	4.77%
GTAA	10%	4.38%
Private Equity	11%	9.50%
Real Estate	10%	4.48%
Credit Opportunities	13%	7.08%
Non-U.S. Equity	14%	8.25%
U.S. Equity	16%	6.23%
Total	100%	

Pension Discount Rates – The discount rate used to measure the PSPRS total pension liabilities was 7.85 percent. The projection of cash flows used to determine the PSPRS discount rates assumed that plan member contributions will be made at the current contribution rate and that employer contributions will be made at rates equal to the difference between the actuarially determined contribution rate and the member rate. Based on those assumptions, the pension plans' fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

NOTES TO FINANCIAL STATEMENTS

Changes in the Agent Plans Net Pension Liability – The following tables present changes in the City’s net pension liability for the PSPRS – Police and PSPRS – Fire pension plans as follows:

PSPRS - Police	Total Pension Liability (Asset) (a)	Plan Fiduciary Net Position (b)	Net Pension Liability (Asset) (a) - (b)
Balance at June 30, 2014	\$ 35,745,948	\$ 24,765,976	\$ 10,979,972
Changes for the Year:			
Service Cost	1,663,042	-	1,663,042
Interest on the Total Pension Liability	2,833,422	-	2,833,422
Differences Between Expected and Actual Experience in the Measurement of the Pension Liability	5,574,308	-	5,574,308
Contributions - Employer	-	1,729,946	(1,729,946)
Contributions - Employee	-	1,196,870	(1,196,870)
Net Investment Income	-	951,951	(951,951)
Benefit Payments, Including Refunds of Employee Contributions	(965,851)	(965,851)	-
Administrative Expenses	-	(23,613)	23,613
Other (Net Transfer)	-	210,447	(210,447)
Net Changes	9,104,921	3,099,750	6,005,171
Balances as of June 30, 2015	\$ 44,850,869	\$ 27,865,726	\$ 16,985,143

PSPRS - Fire	Total Pension Liability (Asset) (a)	Plan Fiduciary Net Position (b)	Net Pension Liability (Asset) (a) - (b)
Balance at June 30, 2014	\$ 30,990,296	\$ 25,231,977	\$ 5,758,319
Changes for the Year:			
Service Cost	1,709,096	-	1,709,096
Interest on the Total Pension Liability	2,480,922	-	2,480,922
Differences Between Expected and Actual Experience in the Measurement of the Pension Liability	991,201	-	991,201
Contributions - Employer	-	1,394,750	(1,394,750)
Contributions - Employee	-	1,085,819	(1,085,819)
Net Investment Income	-	956,696	(956,696)
Benefit Payments, Including Refunds of Employee Contributions	(481,494)	(481,494)	-
Administrative Expenses	-	(23,732)	23,732
Other (Net Transfer)	-	23,521	(23,521)
Net Changes	4,699,725	2,955,560	1,744,165
Balances as of June 30, 2015	\$ 35,690,021	\$ 28,187,537	\$ 7,502,484

NOTES TO FINANCIAL STATEMENTS

Sensitivity of the City's Net Pension Liability to Changes in the Discount Rate – The following table presents the City's net pension liabilities calculated using the discount rates noted above, as well as what the City's net pension liability would be if it were calculated using a discount rate that is 1 percentage point lower (6.85%) or 1 percentage point higher (8.85%) than the current rate:

	1% Decrease	Current Discount Rate	1% Increase
PSPRS Police			
Rate	6.85%	7.85%	8.85%
Net Pension Liability	\$ 23,418,179	\$ 16,985,143	\$ 11,711,005
PSPRS Fire			
Rate	6.85%	7.85%	8.85%
Net Pension Liability	\$ 13,235,505	\$ 7,502,484	\$ 2,805,808

Pension Plan Fiduciary Net Position – Detailed information about the pension plans' fiduciary net position is available in the separately issued PSPRS financial reports.

Pension Expense – For the year ended June 30, 2016, the City recognized the following pension expense:

	Pension Expense
PSPRS Police	\$ 2,328,394
PSPRS Fire	1,225,972

Pension Deferred Outflows/Inflows of Resources – At June 30, 2016, the City reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

PSPRS - Police	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ 5,695,420	\$ -
Changes of assumptions or other inputs	1,803,860	-
Net difference between projected and actual earnings on pension plan investments	861,183	711,145
City contributions subsequent to the measurement date	2,301,028	-
Total	<u>\$ 10,661,491</u>	<u>\$ 711,145</u>
 PSPRS - Firefighters	 Deferred Outflows of Resources	 Deferred Inflows of Resources
Differences between expected and actual experience	\$ 996,969	\$ -
Changes of assumptions or other inputs	869,274	-
Net difference between projected and actual earnings on pension plan investments	881,976	735,409
City contributions subsequent to the measurement date	1,716,087	-
Total	<u>\$ 4,464,306</u>	<u>\$ 735,409</u>

NOTES TO FINANCIAL STATEMENTS

The amounts reported as deferred outflows of resources related to pensions resulting from City contributions subsequent to the measurement date will be recognized as a reduction of the net pension liability (or an increase in the net pension asset) in the year ended June 30, 2017. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

	PSPRS Police	PSPRS Fire
Year ending June 30,		
2017	\$ 1,244,064	\$ 180,728
2018	1,244,064	180,728
2019	1,244,063	180,728
2020	1,481,111	425,865
2021	1,265,816	205,371
Thereafter	1,170,200	839,390

Agent Plan OPEB Actuarial Assumptions – The health insurance premium benefit contribution requirements for the year ended June 30, 2016, were established by the June 30, 2014 actuarial valuations, and those actuarial valuations were based on the following actuarial methods and assumptions.

Actuarial valuations involve estimates of the reported amounts' value and assumptions about the probability of events in the future. Amounts determined regarding the funded status of the plans and the annual required contributions are subject to continual revision as actual results are compared to past expectations and new estimates are made. The required schedule of funding progress for the health insurance premium benefit presented as required supplementary information provides multiyear trend information that shows whether the actuarial value of the plans' assets are increasing or decreasing over time relative to the actuarial accrued liability for benefits.

Projections of benefits are based on (1) the plans as understood by the City and plans' members and include the types of benefits in force at the valuation date, and (2) the pattern of sharing benefit costs between the City and plans' members to that point. Actuarial calculations reflect a long-term perspective and employ methods and assumptions that are designed to reduce short-term volatility in actuarial accrued liabilities and the actuarial value of assets. The significant actuarial methods and assumptions used are the same for all PSPRS plans and related benefits (unless noted), and the actuarial methods and assumptions used to establish the fiscal year 2016 contribution requirements, are as follows:

Actuarial valuation date	June 30, 2014
Actuarial cost method	Entry age normal
Amortization method	Level percent closed for underfunded actuarial accrued liability, open for excess
Remaining amortization period	22 years for unfunded actuarial accrued liability, 20 years for excess
Asset valuation method	7-year smoothed market value; 20% corridor
Actuarial assumptions:	
Investment rate of return	7.85%
Projected salary increases	4% - 8%
Wage growth	4.00%

NOTES TO FINANCIAL STATEMENTS

Agent Plan OPEB Trend Information – The table below presents the annual OPEB cost information for the health insurance premium benefit for the current and 2 preceding years:

Year Ended June 30	Annual OPEB Cost	Percentage of Annual Cost Contributed	Net OPEB Obligation
PSPRS Police			
2016	\$ 52,449	100.00%	\$ -
2015	111,399	100.00	-
2014	76,356	100.00	-
PSPRS Fire			
2016	\$ 40,464	100.00%	\$ -
2015	80,317	100.00	-
2014	58,949	100.00	-

Agent Plan OPEB Funded Status – The funded status of the health insurance premium benefit plans as of the most recent valuation date, June 30, 2015 is as follows:

	PSPRS Police	PSPRS Fire
Actuarial value of assets (a)	\$ 914,353	\$ 710,185
Actuarial accrued liability (b)	1,196,404	897,623
Unfunded actuarial accrued liability		
(Funding excess) (b) - (a)	282,051	187,438
Funded ratio (a) / (b)	76.43%	79.12%
Annual covered payroll (c)	10,225,901	9,753,914
Unfunded actuarial accrued liability		
(funding excess) as a percentage of covered payroll (b) - (a) / (c)	2.76%	1.92%

The funded status of the all the PSPRS health insurance premium benefit plans in the June 30, 2014 actuarial valuation was determined using the following actuarial methods and assumptions, applied to all periods included in the measurement:

Actuarial valuation date	June 30, 2015
Actuarial cost method	Entry age normal
Amortization method	Level percent closed for underfunded actuarial accrued liability, open for excess
Remaining amortization period	21 years for unfunded actuarial accrued liability, 20 years for excess
Asset valuation method	7-year smoothed market value; 80%/120% corridor
Actuarial assumptions:	
Investment rate of return	7.85%
Projected salary increases	4.0% - 8.0%
Wage growth	4.00%

NOTES TO FINANCIAL STATEMENTS

Elected Officials Retirement Plan (EORP)

Plan Description - Elected officials and judges participate in the Elected Officials Retirement Plan (EORP). EORP administers a cost-sharing multiple-employer defined benefit pension plan and a cost-sharing multiple-employer defined benefit health insurance premium benefit (OPEB) plan for elected officials and judges who were members of the plan on December 31, 2013. This plan was closed to new members as of January 1, 2014. The PSPRS Board of Trustees governs the EORP according to the provisions of A.R.S. Title 38, Chapter 5, Article 3. The EORP issues a publicly available financial report that includes its financial statements and required supplementary information. The report is available on PSPRS's website at www.psprs.com.

Benefits Provided - The EORP provides retirement, health insurance premium supplement, disability, and survivor benefits. State statute establishes benefit terms. Retirement, disability, and survivor benefits are calculated on the basis of age, average yearly compensation, and service credit as follows:

	Initial Membership Date:	
	Before January 1, 2012	On or After January 1, 2012
Retirement and Disability		
Years of service	20 years, any age	10 years, age 62
and age required	10 years, age 62	5 years, age 65
to receive benefit	5 years, age 65 5 years, any age* any years and age if disabled	any years and age if disabled
Final average salary is based on	Highest 36 consecutive months of last 10 years	Highest 60 consecutive months of last 10 years
Benefit percent		
Normal retirement	4% per year of service not to exceed 80%	3% per year of service not to exceed 75%
Disability retirement	80% with 10 or more years of service 40% with 5 to 10 years of service 20% with less than 5 years of service	75% with 10 or more years of service 37.5% with 5 to 10 years of service 18.75% with less than 5 years of service
Survivor benefit		
Retired members	75% of retired member's benefit	50% of retired member's benefit
Active members and other inactive members	75% of disability retirement benefit	50% of disability retirement benefit

* With reduced benefits of 0.25% for each month early retirement precedes the member's normal retirement age, with a maximum reduction of 30%.

NOTES TO FINANCIAL STATEMENTS

Retirement and survivor benefits are subject to automatic cost-of-living adjustments based on excess investment earning. In addition, from and after December 31, 2015, the Legislature may enact permanent one-time benefit increases after a Joint Legislative Budget Committee analysis of the increase's effects on the plan.

Contributions - State statutes establish active member and employer contribution requirements. Statute also appropriates \$5 million annually through fiscal year 2043 for the EORP from the State of Arizona to supplement the normal cost plus an amount to amortize the unfunded accrued liability. For the year ended June 30, 2016, active EORP members were required by statute to contribute 13 percent of the members' annual covered payroll, and the City was required to contribute a designated portion of certain court fees and 23.5 percent of active EORP members' annual covered payroll. The City's contributions to the pension plan for the year ended June 30, 2016, were \$36,535. The City's OPEB contributions for the current and 2 preceding years, all of which were equal to the required contributions, were as follows:

<u>Year Ended June 30,</u>	<u>Health Benefit Supplement Fund</u>
2016	\$ -
2015	1,443
2014	(9,838)

During fiscal year 2016, the City paid for EORP pension contributions 100 percent from the General Fund.

Pension Liability - At June 30, 2016, the City reported a liability for its proportionate share of the EORP's net pension liability that reflected a reduction for the City's proportionate share of the State's appropriation for EORP. The amount the City recognized as its proportionate share of the net pension liability, the related state support, and the total portion of the net pension liability that was associated with the City were as follows:

City's proportionate share of the EORP net pension liability	\$ 1,276,030
State's proportionate share of the EORP net pension liability associated with the City	107,037
Total	<u>\$ 1,383,067</u>

The net pension liability was measured as of June 30, 2015, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of that date.

The City's proportion of the net pension liability was based on the City's actual contributions to the plan relative to the total of all participating employers' actual contributions for the year ended June 30, 2015. The City's proportion measured as of June 30, 2015 was 0.1632898 percent which is a decrease of .0612144 percent from its proportionate measured as of June 30, 2014.

NOTES TO FINANCIAL STATEMENTS

Pension Expense and Deferred Outflows/Inflows of Resources - For the year ended June 30, 2016, the City recognized pension expense for EORP of \$273,820 and revenue of \$107,037 for the City's proportionate share of the State's appropriation to EORP. At June 30, 2016, the City reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ 2,040	\$ 14,207
Changes of assumptions or other inputs	213,809	-
Net difference between projected and actual earnings on pension plan investments	7,739	-
Changes in proportion and differences between City contributions and proportionate share of contributions	-	185,758
City contributions subsequent to the measurement date	36,535	-
Total	<u>\$ 260,123</u>	<u>\$ 199,965</u>

The \$36,535 reported as deferred outflows of resources related to EORP pensions resulting from City contributions subsequent to the measurement date will be recognized as a reduction of the net pension liability in the year ending June 30, 2017. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to EORP pensions will be recognized in pension expense as follows:

<u>Year Ended June 30,</u>	
2017	\$ 56,337
2018	(39,178)
2019	637
2020	5,827

Actuarial Assumptions - The significant actuarial assumptions used to measure the total pension liability are as follows:

Actuarial valuation date	June 30, 2015
Actuarial cost method	Entry age normal
Investment rate of return	4.86%
Projected salary increases	4.25%
Inflation	4.00%
Permanent benefit increase	Included
Mortality rates	RP-2000 mortality table projected to 2025 with projection scale AA

Actuarial assumptions used in the June 30, 2015, valuation were based on the results of an actuarial experience study for the 5-year period ended June 30, 2011.

NOTES TO FINANCIAL STATEMENTS

The long-term expected rate of return on EORP pension plan investments was determined to be 7.85 percent using a building-block method in which best-estimate ranges of expected future real rates of return (expected returns, net of pension plan investment expenses and inflation) are developed for each major asset class. The target allocation and best estimates of geometric real rates of return for each major asset class are summarized in the following table:

Asset Class	Target Allocation	Long-Term Expected Geometric Real Rate of Return
Short Term Investments	2%	0.75%
Absolute Return	5%	4.11%
Risk Parity	4%	5.13%
Fixed Income	7%	2.92%
Real Assets	8%	4.77%
GTAA	10%	4.38%
Private Equity	11%	9.50%
Real Estate	10%	4.48%
Credit Opportunities	13%	7.08%
Non-U.S. Equity	14%	8.25%
U.S. Equity	16%	6.23%
Total	100%	

Discount Rate - At June 30, 2015, the discount rate used to measure the EORP total pension liability was 4.86 percent, which was a decrease of 0.81 from the discount rate used as of June 30, 2014. The projection of cash flows used to determine the discount rate assumed that plan member contributions will be made at the current contribution rate, employer contributions will be made at the statutorily set rates, and state contributions will be made as currently required by statute. Based on those assumptions, the pension plan's fiduciary net position was projected to be insufficient to make all projected future benefit payments of current plan members. Therefore, to determine the total pension liability for the plan, the long-term expected rate of return on pension plan investments of 7.85 percent was applied to periods of projected benefit payments through the year ended June 30, 2028. A municipal bond rate of 3.8 percent obtained from the 20-year Bond Buyer Index, as published by the Federal Reserve as of June 25, 2015, was applied to periods of projected benefit payments after June 30, 2028.

Sensitivity of the City's Proportionate Share of the EORP Net Pension Liability to Changes in the Discount Rate - The following table presents the City's proportionate share of the net pension liability calculated using the discount rate of 4.86 percent, as well as what the City's proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1 percentage point lower (3.86 percent) or 1 percentage point higher (5.86 percent) than the current rate:

	1% Decrease (3.86%)	Current Discount Rate (4.86%)	1% Increase (5.86%)
City's proportionate share of the net pension liability	\$ 1,485,460	\$ 1,276,030	\$ 1,099,911

Pension Plan Fiduciary Net Position - Detailed information about the pension plan's fiduciary net position is available in the separately issued EORP financial report.

NOTES TO FINANCIAL STATEMENTS

Deferred Compensation Plans

The City offers its employees deferred compensation plans created in accordance with Internal Revenue Code Section 457. The plan, available to all full-time government employees at their option, permits participants to defer a portion of their salary until future years. The deferred compensation is not available to participants until termination, retirement, death, or an unforeseeable emergency.

The City also offers a Post-Employment Health Plan (PEHP). The PEHP is a defined contribution plan designed to allow the City and employees to set aside money during the course of employment with the City, for the payment of qualified medical expenses incurred post-employment. The Post-Employment Health Plan consists of two sub-accounts that can accept contributions. One account accepts fixed contributions, which has been suspended, and the other accepts earned and unused personal time off (vacation and sick leave). After voluntary termination of employment with the City, employees are provided with the option to be paid for all, or a portion of, earned and unused personal time off, or move earned and unused personal time off into their PEHP account.

The City's fiduciary responsibility for both plans is that of exercising "due care" in selecting a third-party administrator. Federal legislation requires that Section 457 plan and post-employment health plan assets be held in trust for employees; therefore, employee assets held in Section 457 plan and post-employment plan assets are held in trust for employees. Employee assets held in Section 457 plans and post-employment health plans are not the property of the City and are not subject to claims of the City's general creditors. Therefore, the Deferred Compensation Agency Funds are not included in the City's Financial Statements.

NOTE 9 - RISK MANAGEMENT

Risk Management Fund

The City is exposed to various risks of loss related to torts; theft of, damage to and destruction of assets; errors and omissions; and natural disasters. Thus, the City participates in the Arizona Municipal Risk Retention Pool (AMRRP), which provides a comprehensive municipal coverage program including property, general liability, public officials' liability, automobile liability and physical damage, bonds and crime. The basic coverage program is standard for all participants and deemed to be appropriate by the governing board of the AMRRP. Individual limits are determined by the Council and staff members.

The limit for basic coverage is \$2 million per occurrence and \$13 million under an umbrella policy for a total of \$15 million on a claim made basis. The AMRRP is structured such that member premiums are based on actuarial review that will provide adequate reserves to allow the Pool to meet its expected financial obligation. The Pool has the authority to assess its members' additional premiums should reserves and annual premiums be insufficient to meet the Pool's obligations. The City can be assessed up to the amount of the current year's contribution. The City's obligation is to file claims timely. The AMRRP is responsible for investigating claims, settling claims and billing the City for any deductible portion. The City's loss has not exceeded its coverage in any of the last three years, and the deductible portion has not been material to the City's financial position.

NOTES TO FINANCIAL STATEMENTS

Employee Healthcare Fund

The City has established the Employee Healthcare Fund to account for the costs of claims incurred by the City through a self-insurance program. The City is self-insured for individual health claims up to \$100,000. Commercial stop loss insurance is in place for claims in excess of the individual limit as well as aggregate insurance for claims in excess of 110% of the City's total actuarially projected claims.

The claims liability includes an estimated amount for claims that have been incurred but not reported. Claim liabilities are calculated considering the effects of inflation, recent claim settlement trends and other economic and social factors. Claims that have been incurred but not reported make up \$635,000 of the total claims payable reported. The remaining \$591,062 is made up of outstanding claims at year end. The City's loss has not exceeded its coverage over the last year.

As of June 30, 2016, unpaid claims were as follows:

	Employee Healthcare Fund	
	2015	2016
Beginning unpaid claims	\$ 1,024,401	\$ 1,538,461
Claims incurred and changes in estimates	7,704,843	7,897,628
Payments made	(7,190,783)	(8,210,027)
Ending unpaid claims	<u>\$ 1,538,461</u>	<u>\$ 1,226,062</u>

NOTE 10 - CONTINGENT LIABILITIES

The City is a defendant in various lawsuits that are incidental to the ordinary course of its operations. Although the outcome of these lawsuits is not presently determinable, in the opinion of the City's legal counsel, the resolution of these matters will not have a material adverse effect on the City's financial position.

Amounts received or receivable from grantor agencies are subject to audit and adjustment by grantor agencies, principally the federal government. Any disallowed claims, including amounts already collected, may constitute a liability of the applicable funds. The amount, if any, of expenditures which may be disallowed by the grantor cannot be determined at this time, although the City expects such amounts, if any, to be immaterial.

The City has entered into a settlement agreement of which the City is financially responsible for a drainage study and road improvements. The total cost to be incurred is currently unknown. The City is also financially responsible to reimburse future development impact fees, planning and zoning fees, and building permits charged by the City related directly to the development of the Property defined in the settlement agreement up to \$800,000.

NOTES TO FINANCIAL STATEMENTS

NOTE 11 - INTERFUND BORROWING AND TRANSFERS

As of June 30, 2016, interfund balances were as follows:

Due to/from other funds:

Due from	Due to
Non-Major Governmental Funds	General Fund
	\$ 771,371

At year end, several non-major funds had negative cash balances in the pooled cash account. Short-term negative cash balances were eliminated by interfund borrowing with the General Fund and are expected to be paid within one year.

Advances to/from other funds:

Advances to	Advances from			
	General Fund	General Capital Projects Fund	Sewer Fund	Total
General Government Development Fee Fund	\$ 438,681	\$ 36,019,204	\$ 6,609,599	\$ 43,067,484
Non-Major Governmental Funds	-	-	4,585,913	4,585,913
Total	\$ 438,681	\$ 36,019,204	\$ 11,195,512	\$ 47,653,397

As of June 30, 2016, the City had several long-term loans outstanding. The General Fund loan is the result of a shortage of cash in a prior year, the repayment is awaiting governing board approval. The remaining loans relate to expenditures for projects to be funded by impact fees. These loans will be repaid as impact fees are collected in future years.

Interfund transfers:

Transfers out	Transfers in				Total
	General Fund	General Capital Project Fund	Governmental Development Fee Fund	Non-Major Governmental Funds	
General Fund	\$ -	\$ 5,593,600	\$ -	\$ 2,088,325	\$ 7,681,925
General Government Development Fee Fund	-	-	-	363,568	363,568
Non-Major Governmental Funds	1,664,112	-	723,215	2,234,187	4,621,514
Water Fund	390,975	-	-	-	390,975
Sewer Fund	724,626	-	-	-	724,626
Sanitation Fund	34,408	-	-	-	34,408
Total	\$ 2,814,121	\$ 5,593,600	\$ 723,215	\$ 4,686,080	\$ 13,817,016

Transfers between funds were used to (1) record payments in lieu of franchise fees, payments in lieu of property taxes and license fees from the enterprise funds to the General Fund (2) to support as needed replacement of vehicles and maintenance, construction or purchase of city assets and (3) move amounts for debt service payments. During the year ended June 30, 2016 the governmental activities transferred assets totaling \$948,433 to business-type activities.

NOTES TO FINANCIAL STATEMENTS

NOTE 12 – FUND BALANCE CLASSIFICATION

Fund balance classifications:

	General Fund	General Capital Projects Fund	General Government Development Fee Fund	Highway User Revenue Fund	Transportation Improvement Fund	Non-Major Governmental Funds	Total
Fund balances							
Nonspendable:							
Prepays	\$ 317,656	\$ 5,167	\$ -	\$ 270	\$ -	\$ 14,753	\$ 337,846
Inventory	531,173	-	-	347,936	-	-	879,109
Advance to other funds	438,681	-	-	-	-	-	438,681
Total Nonspendable	1,287,510	5,167	-	348,206	-	14,753	1,655,636
Restricted:							
Public works	-	-	-	-	-	8,365,482	8,365,482
Parks and recreation	-	320,731	-	-	-	1,720,258	2,040,989
Library	-	-	-	-	-	4,572,083	4,572,083
Debt service	-	-	-	-	-	813	813
Transportation	-	-	-	1,344,216	-	2,559,826	3,904,042
Police	-	-	-	-	-	2,548,165	2,548,165
Court	-	-	-	-	-	223,954	223,954
Fire	-	-	-	-	-	1,408,728	1,408,728
Total Restricted	-	320,731	-	1,344,216	-	21,399,309	23,064,256
Committed:							
Construction projects	-	36,240,450	-	-	-	-	36,240,450
Transportation	-	-	-	-	3,709,236	-	3,709,236
Tourism	-	-	-	-	-	296,504	296,504
Total Committed	-	36,240,450	-	-	3,709,236	296,504	40,246,190
Assigned:							
Parks and recreation	487,390	-	-	-	-	49,883	537,273
Vehicle replacement	50,314	-	-	-	-	-	50,314
Capital	-	66,082	-	-	-	-	66,082
Transportation	-	-	-	-	97,488	38,225	135,713
Infrastructure	-	-	-	-	-	139,103	139,103
Public safety	-	-	-	-	-	25,773	25,773
Tourism	-	-	-	-	-	7,132	7,132
Library	-	-	-	-	-	40,274	40,274
Court	-	-	-	-	-	3,255	3,255
Other	5,117	-	-	-	-	2,615	7,732
Total Assigned	542,821	66,082	-	-	97,488	306,260	1,012,651
Unassigned:							
Unassigned or negative fund balance	37,385,696	-	(43,065,667)	-	-	(4,606,117)	(10,286,088)
Total	<u>\$ 39,216,027</u>	<u>\$ 36,632,430</u>	<u>\$ (43,065,667)</u>	<u>\$ 1,692,422</u>	<u>\$ 3,806,724</u>	<u>\$ 17,410,709</u>	<u>\$ 55,692,645</u>

NOTES TO FINANCIAL STATEMENTS

NOTE 13 – DEFICIT FUND BALANCES

As of June 30, 2016, the following individual governmental funds reported deficits in fund balances:

	<u>Deficit</u>
Major Funds:	
General Government Development Fee Fund	\$ 43,065,667
Non-Major Governmental Funds:	
Fire & EMS Development Fee Grandfathered Fund	4,591,364

Deficits arose due to project expenses incurred in current and prior years exceeding impact fee revenues collected. The deficit fund balances are expected to be funded with future development impact fees received.



REQUIRED SUPPLEMENTARY INFORMATION

Required Supplementary Information
Schedule of the City's Proportionate Share of Net Pension Liability
Cost Sharing Pension Plans

Arizona State Retirement System

	Reporting Year (Measurement Date)	Reporting Year (Measurement Date)	Reporting Year (Measurement Date)
	2016	2015	2014 through
	(2015)	(2014)	2007
City's Proportion of the Net Pension Liability	0.326400%	0.290473%	Information
City's Proportionate Share of the Net Pension Liability	\$ 50,841,272	\$ 42,980,167	not available
City's Covered Payroll	\$ 30,121,665	\$ 26,536,195	
City's Proportionate Share of the Net Pension Liability as a Percentage of its Covered Payroll	168.79%	161.97%	
Plan Fiduciary Net Position as a Percentage of the Total Pension Liability	68.35%	69.49%	

Elected Officials Retirement Plan

	Reporting Fiscal Year (Measurement Date)	Reporting Fiscal Year (Measurement Date)	Reporting Fiscal Year (Measurement Date)
	2016	2015	2014 through
	(2015)	(2014)	2007
City's Proportion of the Net Pension Liability	0.163290%	0.224504%	Information
City's Proportionate Share of the Net Pension Liability	\$ 1,276,030	\$ 1,505,462	not available
State's Proportionate Share of the Net Pension Liability Associated with the City	107,037	136,820	
Total	\$ 1,383,067	\$ 1,642,282	
City's Covered Payroll	\$ 155,470	\$ 154,983	
City's Proportionate Share of the Net Pension Liability as a Percentage of its Covered Payroll	820.76%	971.37%	
Plan Fiduciary Net Position as a Percentage of the Total Pension Liability	28.32%	31.91%	

See accompanying notes to this schedule.

Required Supplementary Information

Schedule of Changes in the City's Net Pension Liability and Related Ratios

Agent Pension Plans

PSPRS Police	Reporting Year (Measurement Date)	Reporting Year (Measurement Date)	Reporting Year (Measurement Date)
	2016 (2015)	2015 (2014)	2014 through 2007
Total Pension Liability			Information not available
Service Cost	\$ 1,663,042	\$ 1,565,018	
Interest on the Total Pension Liability	2,833,422	2,300,961	
Changes of Benefit Terms	-	241,790	
Differences Between Expected and Actual Experience in the Measurement of the Pension Liability	5,574,308	1,218,340	
Changes of Assumptions or Other Inputs	-	2,469,394	
Benefit Payments, Including Refunds of Employee Contributions	(965,851)	(1,157,301)	
Net Change in Total Pension Liability	9,104,921	6,638,202	
Total Pension Liability - Beginning	35,745,948	29,107,746	
Total Pension Liability - Ending (a)	44,850,869	35,745,948	
Plan Fiduciary Net Position			
Contributions - Employer	1,729,946	1,359,213	
Contributions - Employee	1,196,870	977,373	
Net Investment Income	951,951	2,898,873	
Benefit Payments, Including Refunds of Employee Contributions	(965,851)	(1,157,301)	
Administrative Expenses	(23,613)	(23,346)	
Other (Net Transfer)	210,447	174,908	
Net Change in Plan Fiduciary Net Position	3,099,750	4,229,720	
Plan Fiduciary Net Position - Beginning	24,765,976	20,536,256	
Plan Fiduciary Net Position - Ending (b)	27,865,726	24,765,976	
City's Net Pension Liability (Asset) - Ending (a) - (b)	\$ 16,985,143	\$ 10,979,972	
Plan Fiduciary Net Position as a Percentage of the Total Pension Liability	62.13%	69.28%	
Covered Payroll	\$ 10,682,880	\$ 8,730,979	
City's Net Pension Liability (Asset) as a Percentage of Covered Payroll	158.99%	125.76%	

See accompanying notes to this schedule.

Required Supplementary Information
Schedule of Changes in the City's Net Pension Liability and Related Ratios (Continued)
Agent Pension Plans

PSPRS Fire	Reporting Year (Measurement Date)	Reporting Year (Measurement Date)	Reporting Year (Measurement Date)
	2016 (2015)	2015 (2014)	2014 through 2007
Total Pension Liability			Information not available
Service Cost	\$ 1,709,096	\$ 1,635,304	
Interest on the Total Pension Liability	2,480,922	2,170,938	
Changes of Benefit Terms	-	25,204	
Differences Between Expected and Actual Experience in the Measurement of the Pension Liability	991,201	122,957	
Changes of Assumptions or Other Inputs	-	1,068,570	
Benefit Payments, Including Refunds of Employee Contributions	(481,494)	(1,740,565)	
Net Change in Total Pension Liability	4,699,725	3,282,408	
Total Pension Liability - Beginning	30,990,296	27,707,888	
Total Pension Liability - Ending (a)	35,690,021	30,990,296	
Plan Fiduciary Net Position			
Contributions - Employer	1,394,750	1,298,311	
Contributions - Employee	1,085,819	916,860	
Net Investment Income	956,696	2,997,787	
Benefit Payments, Including Refunds of Employee Contributions	(481,494)	(1,740,565)	
Administrative Expenses	(23,732)	(24,143)	
Other (Net Transfer)	23,521	-	
Net Change in Plan Fiduciary Net Position	2,955,560	3,448,250	
Plan Fiduciary Net Position - Beginning	25,231,977	21,783,727	
Plan Fiduciary Net Position - Ending (b)	28,187,537	25,231,977	
City's Net Pension Liability (Asset) - Ending (a) - (b)	\$ 7,502,484	\$ 5,758,319	
Plan Fiduciary Net Position as a Percentage of the Total Pension Liability	78.98%	81.42%	
Covered Payroll	\$ 9,802,389	\$ 8,942,409	
City's Net Pension Liability (Asset) as a Percentage of Covered- Payroll	76.54%	64.39%	

See accompanying notes to this schedule.

Required Supplementary Information
Schedule of City Pension Contributions

Arizona State Retirement System

	Reporting Fiscal Year			2013 through 2007 Information not available
	2016	2015	2014	
Statutorily Required Contribution	\$ 3,569,994	\$ 3,259,073	\$ 2,801,701	Information not available
City's Contribution in Relation to the Statutorily Required Contribution	3,569,994	3,259,073	2,801,701	
City's Contribution Deficiency (Excess)	\$ -	\$ -	\$ -	
City's Covered Payroll	\$ 32,932,534	\$ 30,121,665	\$ 26,536,195	
City's Contributions as a Percentage of Covered- Payroll	10.84%	10.82%	10.56%	

Elected Officials Retirement Plan

	Reporting Fiscal Year			2013 through 2007 Information not available
	2016	2015	2014	
Statutorily Required Contribution	\$ 36,535	\$ 35,199	\$ 47,836	Information not available
City's Contribution in Relation to the Statutorily Required Contribution	36,535	35,199	47,836	
City's Contribution Deficiency (Excess)	\$ -	\$ -	\$ -	
City's Covered Payroll	\$ 155,470	\$ 155,470	\$ 154,983	
City's Contributions as a Percentage of Covered- Payroll	23.50%	22.64%	30.87%	

See accompanying notes to this schedule.

Required Supplementary Information
Schedule of City Pension Contributions (Continued)

PSPRS Police

	Reporting Fiscal Year			2013 through 2007
	2016	2015	2014	
Actuarially Determined Contribution	\$ 2,301,028	\$ 1,753,988	\$ 1,359,213	Information not available
City's Contribution in Relation to the Actuarially Determined Contribution	2,301,028	1,753,988	1,359,213	
City's Contribution Deficiency (Excess)	\$ -	\$ -	\$ -	
City's Covered Payroll	\$ 11,159,388	\$ 10,682,880	\$ 8,730,979	
City's Contributions as a Percentage of Covered- Payroll	20.62%	16.42%	15.57%	

PSPRS Fire

	Reporting Fiscal Year			2013 through 2007
	2016	2015	2014	
Actuarially Determined Contribution	\$ 1,716,087	\$ 1,417,546	\$ 1,298,311	Information not available
City's Contribution in Relation to the Actuarially Determined Contribution	1,716,087	1,417,546	1,298,311	
City's Contribution Deficiency (Excess)	\$ -	\$ -	\$ -	
City's Covered Payroll	\$ 10,648,460	\$ 9,802,389	\$ 8,942,409	
City's Contributions as a Percentage of Covered- Payroll	16.12%	14.46%	14.52%	

See accompanying notes to this schedule.

Required Supplementary Information
Notes to Pension Schedules

NOTE 1 CHANGE IN ACCOUNTING PRINCIPLE

For the year ended June 30, 2016, the City implemented the provisions of GASB Statement No. 82, *Pension Issues*. The statement changed the measure of payroll that is required supplementary information from covered-employee payroll to covered payroll. Accordingly, payroll amounts in the pension plan schedules and related ratios for current and prior periods have been amended to reflect this change.

NOTE 2 ACTUARIALLY DETERMINED CONTRIBUTION RATES

Actuarial determined contribution rates for PSPRS are calculated as of June 30 two years prior to the end of the fiscal year in which contributions are made. The actuarial method and assumptions used to establish the contribution requirements are as follows:

Actuarial Cost Method	Entry age normal
Amortization Level	Level percent closed for unfunded actuarial accrued liability, open for excess
Remaining Amortization Period as of the 2014 Actuarial Valuation	22 years for unfunded actuarial accrued liability, 20 years for excess
Asset Valuation Method	7-year smoothed market value; 80%/120% market corridor
Actuarial Assumptions:	
Investment Rate of Return	In the 2013 actuarial valuation, the investment rate of return was decreased from 8.0% to 7.85%
Projected Salary Increases	In the 2014 actuarial valuation, projected salary increases were decreased from 4.5%-8.5% to 4.0%-8.0% for PSPRS. In the 2013 actuarial valuation, projected salary increases were decreased from 5.0%-9.0% to 4.5%-8.5% for PSPRS.
Wage Growth	In the 2014 actuarial valuation, wage growth was decreased from 4.5% to 4.0% for PSPRS. In the 2013 actuarial valuation, wage growth decreased from 5.0% to 4.5% for PSPRS.
Retirement Age	Experience-based table of rates that is specific to the type of eligibility condition. Last updated for the 2012 valuation pursuant to an experience study of the period July 1, 2006-June 30, 2011
Mortality	RP-2000 mortality table (adjusted by 105% for both males and females)

NOTE 3 INFORMATION PRIOR TO THE MEASUREMENT DATE

Information prior to the measurement date (June 30, 2014) was not available.

Required Supplementary Information
Schedule of Agent OPEB Plans' Funding Progress

Health Insurance Premium Benefit						
<u>Actuarial Valuation Date</u>	<u>Actuarial value of assets</u>	<u>Actuarial accrued liability</u>	<u>Unfunded actuarial accrued liability (UAAL) (funding excess)</u>	<u>Funded ratio</u>	<u>Annual covered payroll</u>	<u>UAAL (funding excess) as a percentage of covered payroll</u>
PSPRS Police						
6/30/15	\$ 914,353	\$ 1,196,404	\$ 282,051	76.43%	\$ 10,225,901	2.76%
6/30/14	797,597	952,965	155,368	83.70	8,561,824	1.81
6/30/13	-	856,758	856,758	-	7,998,905	10.71
PSPRS Fire						
6/30/15	\$ 710,185	\$ 897,623	\$ 187,438	79.12%	\$ 9,753,914	1.92%
6/30/14	615,616	806,301	190,685	76.35	8,942,409	2.13
6/30/13	-	729,789	729,789	-	8,419,235	8.67

See accompanying notes to this schedule.

Required Supplementary Information
Note to Schedule of Agent OPEB Plans' Funding Progress

NOTE 1 FACTORS THAT AFFECT THE IDENTIFICATION OF TRENDS

Beginning in fiscal year 2014, PSPRS established separate funds for pension benefits and health insurance premium benefits. Previously, the plans recorded both pension and health insurance premium contributions in the same Pension Fund. During fiscal year 2014, the plans transferred prior-year health insurance premium benefit contributions that exceeded benefit payments from each plan's pension fund to the new health insurance fund.

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

General Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Taxes	\$ 45,762,700	\$ 45,762,700	\$ 46,029,715	\$ 267,015
Licenses and permits	5,084,000	5,084,000	5,121,719	37,719
Intergovernmental	30,651,600	30,660,500	31,120,886	460,386
Charges for services	7,712,300	7,867,500	10,171,699	2,304,199
Grants	-	2,000	-	(2,000)
Fines	1,249,700	1,249,700	1,031,468	(218,232)
Rents	636,600	636,600	630,514	(6,086)
Interest	117,300	117,300	302,138	184,838
Donations	461,300	467,800	227,439	(240,361)
Indirect charges	4,983,700	4,884,443	4,884,443	-
Other	315,100	191,600	358,996	167,396
Total revenues	<u>96,974,300</u>	<u>96,924,143</u>	<u>99,879,017</u>	<u>2,954,874</u>
Expenditures:				
GENERAL GOVERNMENT				
City council	378,400	378,400	425,265	46,865
City manager	5,903,300	3,388,000	3,381,121	(6,879)
City attorney	2,034,600	2,182,200	2,007,029	(175,171)
City clerk	459,500	491,200	474,687	(16,513)
Finance	3,888,100	3,693,200	3,413,322	(279,878)
Human resources	2,158,000	2,158,000	2,024,356	(133,644)
Information technology	4,225,200	4,225,200	4,117,422	(107,778)
General operations	<u>255,300</u>	<u>328,000</u>	<u>327,922</u>	<u>(78)</u>
Total general government	<u>19,302,400</u>	<u>16,844,200</u>	<u>16,171,124</u>	<u>(673,076)</u>
PUBLIC SAFETY				
Court	1,983,400	1,983,400	1,902,916	(80,484)
Police	24,479,400	24,492,500	23,537,818	(954,682)
Fire	<u>18,205,300</u>	<u>18,920,600</u>	<u>18,159,462</u>	<u>(761,138)</u>
Total public safety	<u>44,668,100</u>	<u>45,396,500</u>	<u>43,600,196</u>	<u>(1,796,304)</u>
PUBLIC WORKS AND STREETS				
Public works and streets	<u>7,055,800</u>	<u>7,103,400</u>	<u>6,742,779</u>	<u>(360,621)</u>
Total public works and streets	<u>7,055,800</u>	<u>7,103,400</u>	<u>6,742,779</u>	<u>(360,621)</u>
COMMUNITY DEVELOPMENT				
Community development	<u>10,480,100</u>	<u>10,728,900</u>	<u>9,694,429</u>	<u>(1,034,471)</u>
Total community development	<u>\$ 10,480,100</u>	<u>\$ 10,728,900</u>	<u>\$ 9,694,429</u>	<u>\$ (1,034,471)</u>

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
CULTURE AND RECREATION				
Parks and recreation	\$ 17,916,400	\$ 18,038,200	\$ 16,002,124	\$ (2,036,076)
Total culture and recreation	17,916,400	18,038,200	16,002,124	(2,036,076)
Contingency	3,280,300	2,042,900	-	(2,042,900)
Total Contingency	3,280,300	2,042,900	-	(2,042,900)
Total expenditures	102,703,100	100,154,100	92,210,652	(7,943,448)
Revenues over (under) expenditures	(5,728,800)	(3,229,957)	7,668,365	10,898,322
Other financing sources (uses)				
Proceeds from sale of assets	-	-	121,521	121,521
Transfers in	1,153,800	2,814,122	2,814,121	(1)
Transfers out	(6,881,300)	(505,889)	(7,681,925)	(7,176,036)
Total other financing sources (uses)	(5,727,500)	2,308,233	(4,746,283)	(7,054,516)
Net change in fund balance	\$ (11,456,300)	\$ (921,724)	\$ 2,922,082	\$ 3,843,806

See accompanying notes to this schedule.

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

General Government Development Fee Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Development fees	\$ 514,400	\$ 514,400	\$ 757,254	\$ 242,854
Interest	-	-	3,643	3,643
Total revenues	514,400	514,400	760,897	246,497
Expenditures:				
Current:				
General government	25,000	25,000	-	(25,000)
Budget				
Contingency	748,300	748,300	-	(748,300)
Total expenditures	773,300	773,300	-	(773,300)
Revenues over (under) expenditures	(258,900)	(258,900)	760,897	1,019,797
Other financing sources (uses)				
Transfers in	-	-	723,215	723,215
Transfers out	(369,900)	(363,568)	(363,568)	-
Total other financing sources (uses)	(369,900)	(363,568)	359,647	723,215
Net change in fund balance	\$ (628,800)	\$ (622,468)	\$ 1,120,544	\$ 1,743,012

See accompanying notes to this schedule.

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Highway User Revenue Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Intergovernmental	\$ 7,377,200	\$ 7,377,200	\$ 7,648,348	\$ 271,148
Charges for services	13,000	13,000	12,000	(1,000)
Interest	-	-	11,008	11,008
Other	-	-	12,110	12,110
Total revenues	<u>7,390,200</u>	<u>7,390,200</u>	<u>7,683,466</u>	<u>293,266</u>
Expenditures:				
Current:				
Public works and streets	8,306,600	8,269,400	7,986,477	(282,923)
Capital outlay	272,500	318,000	219,634	(98,366)
Budget				
Contingency	<u>347,300</u>	<u>280,000</u>	<u>-</u>	<u>(280,000)</u>
Total expenditures	<u>8,926,400</u>	<u>8,867,400</u>	<u>8,206,111</u>	<u>(661,289)</u>
Revenues (under) expenditures	<u>(1,536,200)</u>	<u>(1,477,200)</u>	<u>(522,645)</u>	<u>954,555</u>
Net change in fund balance	<u>\$ (1,536,200)</u>	<u>\$ (1,477,200)</u>	<u>\$ (522,645)</u>	<u>\$ 954,555</u>

See accompanying notes to this schedule.

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Transportation Improvement Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Taxes	\$ 1,921,000	\$ 1,921,000	\$ 3,417,193	\$ 1,496,193
Grants	-	-	133,328	133,328
Interest	-	-	36,517	36,517
Other	360,000	360,000	-	(360,000)
Total revenues	<u>2,281,000</u>	<u>2,281,000</u>	<u>3,587,038</u>	<u>1,306,038</u>
Expenditures:				
Current:				
Public works and streets	3,032,000	3,170,300	2,361,135	(809,165)
Community development	291,400	291,400	289,682	(1,718)
Capital outlay	1,057,500	1,125,200	489,458	(635,742)
Budget				
Contingency	293,100	73,100	-	(73,100)
Total expenditures	<u>4,674,000</u>	<u>4,660,000</u>	<u>3,140,275</u>	<u>(1,519,725)</u>
Revenues over (under) expenditures	<u>(2,393,000)</u>	<u>(2,379,000)</u>	<u>446,763</u>	<u>2,825,763</u>
Net change in fund balance	<u>\$ (2,393,000)</u>	<u>\$ (2,379,000)</u>	<u>\$ 446,763</u>	<u>\$ 2,825,763</u>

See accompanying notes to this schedule.

NOTE TO REQUIRED SUPPLEMENTARY INFORMATION

NOTE 1 – BUDGETARY BASIS OF ACCOUNTING

Annual budgets are adopted on a basis consistent with accounting principles generally accepted in the United States of America for all governmental funds with the following exceptions: (1) Capital Projects Funds adopt project-length budgets which normally extend beyond the fiscal year (2) Compensated absences are expended when paid, (3) Capital outlays within the enterprise funds are expended on a budget basis.

Prior to the third Monday in July, the City Manager submits to the City Council, and Council adopts a tentative budget for the fiscal year commencing on July 1. The tentative budget includes a schedule of the estimated expenditures and revenues. The proposed budget sets the maximum limit. The tentative budget is then published once a week for two consecutive weeks in a local newspaper. Finally, the City holds a public hearing on the budget and convenes a special meeting to adopt the final proposed budget on or before the 14th day before the tax levy is adopted.

The budget is adopted at the department level in the General Fund and at the fund level for all other funds. Expenditures may not exceed this limit, but transfers may be approved to address new issues, increased prices and changes in scope of existing projects. In such cases, transfers may be approved after final adoption by the Council at a public meeting.



**COMBINING AND INDIVIDUAL FUND
FINANCIAL STATEMENTS AND SCHEDULES**

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

General Capital Projects Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual Amounts	Variance with Final Budget Over (Under)
	Original	Final		
Revenues:				
Taxes	\$ 1,567,500	\$ 1,567,500	\$ 3,761,883	\$ 2,194,383
Grants	1,359,200	1,359,200	928,406	(430,794)
Interest	34,100	34,100	11,852	(22,248)
Other	25,700	25,700	3,689	(22,011)
Total revenues	<u>2,986,500</u>	<u>2,986,500</u>	<u>4,705,830</u>	<u>1,719,330</u>
Expenditures:				
Capital outlay	36,757,900	39,250,200	31,987,627	(7,262,573)
Budget				
Contingency	4,800	-	-	-
Total expenditures	<u>36,762,700</u>	<u>39,250,200</u>	<u>31,987,627</u>	<u>(7,262,573)</u>
Revenues (under) expenditures	<u>(33,776,200)</u>	<u>(36,263,700)</u>	<u>(27,281,797)</u>	<u>8,981,903</u>
Other financing sources (uses)				
Proceeds from sale of assets	-	-	186,000	186,000
Transfers in	5,347,000	5,593,600	5,593,600	-
Total other financing sources (uses)	<u>5,347,000</u>	<u>5,593,600</u>	<u>5,779,600</u>	<u>186,000</u>
Net change in fund balance	<u>\$ (28,429,200)</u>	<u>\$ (30,670,100)</u>	<u>\$ (21,502,197)</u>	<u>\$ 9,167,903</u>

City of Surprise, Arizona
Combining Balance Sheet
Nonmajor Governmental Funds
June 30, 2016

	Special Revenue Funds	Debt Service Fund	Total Non-major Governmental Funds
Assets			
Cash and investments	\$ 21,804,204	\$ -	\$ 21,804,204
Receivables (net of allowances)			
Taxes and franchise fees	80,898	-	80,898
Grants	932,381	-	932,381
Other	139,696	-	139,696
Prepaid items and other assets	14,753	-	14,753
Restricted cash and investments	1,527,445	2,770,138	4,297,583
Total assets	<u>\$ 24,499,377</u>	<u>\$ 2,770,138</u>	<u>\$ 27,269,515</u>
Liabilities			
Accounts payable	\$ 552,932	\$ -	\$ 552,932
Accrued payroll and related taxes	2,189	-	2,189
Due to other funds	771,371	-	771,371
Deposits	1,374	-	1,374
Unearned revenues	564,578	-	564,578
Contracts payable	159,915	-	159,915
Matured bond interest payable	221,209	637,900	859,109
Matured bonds payable	230,000	2,131,425	2,361,425
Advances from other funds	4,585,913	-	4,585,913
Total liabilities	<u>7,089,481</u>	<u>2,769,325</u>	<u>9,858,806</u>
Fund Balances (Deficits)			
Nonspendable	14,753	-	14,753
Restricted	21,398,496	813	21,399,309
Committed	296,504	-	296,504
Assigned	306,260	-	306,260
Unassigned	(4,606,117)	-	(4,606,117)
Total fund balances	<u>17,409,896</u>	<u>813</u>	<u>17,410,709</u>
Total liabilities, deferred inflows and fund balances	<u>\$ 24,499,377</u>	<u>\$ 2,770,138</u>	<u>\$ 27,269,515</u>

City of Surprise, Arizona

Combining Statement of Revenues, Expenditures and Changes in Fund Balances

Nonmajor Governmental Funds

Fiscal Year Ended June 30, 2016

	Special Revenue Funds	Debt Service Fund	Total Non-major Governmental Funds
Revenues:			
Taxes	\$ 3,700,112	\$ -	\$ 3,700,112
Intergovernmental	440,454	-	440,454
Charges for services	1,179,754	-	1,179,754
Grants	1,998,886	-	1,998,886
Fines	183,510	-	183,510
Development fees	2,539,828	-	2,539,828
Interest	210,596	31,848	242,444
Donations	877	-	877
Other	17,404	-	17,404
Total revenues	<u>10,271,421</u>	<u>31,848</u>	<u>10,303,269</u>
Expenditures:			
Current			
General government	135,059	-	135,059
Public safety	833,350	-	833,350
Public works and streets	3,402,076	-	3,402,076
Community development	96,335	-	96,335
Culture and recreation	2,414,215	-	2,414,215
Capital outlay	3,814,333	-	3,814,333
Debt service			
Principal	230,000	2,131,425	2,361,425
Interest and fiscal charges	445,417	1,304,151	1,749,568
Bond issuance costs	-	19,762	19,762
Total expenditures	<u>11,370,785</u>	<u>3,455,338</u>	<u>14,826,123</u>
(Deficiency) of revenues (under) expenditures	<u>(1,099,364)</u>	<u>(3,423,490)</u>	<u>(4,522,854)</u>
Other financing sources (uses)			
Proceeds from sale of capital assets	29,300	-	29,300
Transfers in	1,260,268	3,425,812	4,686,080
Transfers out	(973,918)	(3,647,596)	(4,621,514)
Total other financing sources (uses)	<u>315,650</u>	<u>(221,784)</u>	<u>93,866</u>
Net change in fund balances	<u>(783,714)</u>	<u>(3,645,274)</u>	<u>(4,428,988)</u>
Fund balances, beginning	<u>18,193,610</u>	<u>3,646,087</u>	<u>21,839,697</u>
Fund balances, ending	<u>\$ 17,409,896</u>	<u>\$ 813</u>	<u>\$ 17,410,709</u>

NON-MAJOR GOVERNMENTAL FUND DESCRIPTIONS

- ❖ Special revenue funds – These funds account for specific non-capital revenues that are restricted in their allowable use.
 - *163rd Avenue Roadway Development Impact Fee Fund* – This fund was established to account for development impact fees that are assessed to the service area identified as the 163rd Avenue Roadway.
 - *Employee Dependent Scholarship Fund* – Employee dependent scholarships awarded to the dependents of current City of Surprise employees. Donations and interest earnings fund these scholarships. City policy restricts the use of these funds.
 - *Grants Fund* – This fund has been established to account for revenues and expenditures from the various grants received by the City.
 - *LTAF II Fund* – This fund has been established to account for revenues and expenditures received by the City from the state of Arizona. These funds are a portion of lottery money collected and can be used to fund transit operations, facilities, and equipment purchases.
 - *Library Development Fee Fund* – This fund was established to account for the inflow of library development fees levied on new residential construction. This fee can only be used for the purchase, construction, financing, and furnishing of new items directly related to the increased demand on library services caused by growth.
 - *Marley Park Community Facility District Fund* – This fund was established to provide a location to process operating expenditures and for the collection of the related portion of the property taxes from properties located in the district. These proceeds are legally restricted to the payment of operations within the district.
 - *Municipal Court Enhancement Fund* – Established in FY2003 this fund tracks revenue associated with fines dedicated to Municipal Court technology improvements. City policy restricts the use of these funds.
 - *Municipal Court FARE Fund* – This fund is used to discretely track funds received by the City that are restricted to use on projects that enhance the fine collections process. FARE - Fines/fees and restitution enforcement.
 - *Municipal Court JCEF Fund* – This fund is used to discretely track funds received by the City that are restricted to use on technology improvements in the Municipal Court. JCEF - Judicial court enhancement fund.
 - *Municipal Court MFTG Fund* – This fund is used to discretely track funds received by the City that are restricted to use on projects that aid in the processing of criminal cases. MFTG - Municipal fill the gap.
 - *Neighborhood Revitalization Fund* – This fund is used to track all revenues and expenditures associated with the City's neighborhood revitalization program. This program is funded through a combination of federal, state, and local funds. City policy, grant agreements, and contractual obligations restrict the use of these funds.
 - *Net Premium Seating Fund* – This fund was established to account for the revenues and expenditures for a ticket surcharge on the sale of spring training tickets for premium seats.
 - *Parks and Recreation Development Fee Fund* – This fund was established to account for the inflow of parks and recreation development fees levied on new residential construction. This fee can only be used for the purchase, construction, financing and furnishing of new items directly related to the increased demand on parks and recreation services caused by growth.
 - *Police Development Fee Fund* – This fund was established to account for the inflow of police development fees levied on new residential and commercial construction. This fee can only be used for the purchase, construction, financing and furnishing of new capital or one-time items directly related to the increased demand on police services caused by growth.

NON-MAJOR GOVERNMENTAL FUND DESCRIPTIONS

- *Proposition 400 Fund* – This fund is used to track all revenues and expenditures for the county wide half-cent sales tax to be used for regional transportation improvements.
 - *Public Works Expansion Development Fee Fund* – This fund was established to account for the inflow of public works development fees levied on new residential and commercial construction. This fee can only be used for the purchase, construction, financing and furnishing of new capital or one-time items directly related to the increased demand on public works caused by growth.
 - *Roads of Regional Significance SPA 2, 4 & 6 Fund* – This fund was established to account for the inflow of development fees levied on new residential and commercial construction. This fee can only be used for the purchase, construction, financing, and furnishing of new capital or one-time items directly related to the increased demand on roadways caused by growth.
 - *Roads of Regional Significance SPA 3 & 5 Fund* – This fund was established to account for the inflow of development fees levied on new residential and commercial construction. This fee can only be used for the purchase, construction, financing, and furnishing of new capital or one-time items directly related to the increased demand on roadways caused by growth.
 - *SB1398 Fines Fund* – This fund was established to account for funds the City receives from the state of Arizona for penalties charged on certain violations. These revenues are limited to the purchase of officer safety equipment.
 - *SPD DEA Fund* - This fund is used to discretely track funds received from the participation on DEA task forces in the Greater Phoenix area. This use of these funds is limited to approval by the disbursing program manager and is generally related to purchase and maintenance of departmental equipment not included in the general budgets. SPD – Surprise Police Department. DEA – Drug Enforcement Activity.
 - *SPD RICO Fund* – This fund is used to discretely track funds received from participation in the Maricopa County Attorney’s Office Anti-Racketeering Influenced and Corrupt Organizations (RICO) task force.
 - *SPD Towing Fund* – This fund is used to track activity in the Police Department for vehicle impounds. The use of these funds is limited to administrative management of the vehicle impound program.
 - *Spring Training Ticket Surcharge Fund* – This fund was established to account for the revenue and expenditures from a \$1 per ticket surcharge on the sale of spring training tickets. These revenues are limited to operational improvements to stadium facilities.
 - *Street Lighting Districts Fund* – Eighty-four Street Light Improvement Districts (SLIDs) have been established by ordinance to provide a centralized location for the collection of taxes from properties located in the district. These proceeds are legally restricted to the payment of electricity to operate the street lights within the district.
 - *Tourism Fund* – This fund is used to track all revenues and expenditures associated with the City’s 2.52% bed tax. The funds are used to support tourism within the City. City policy and state statute restrict the use of these funds.
 - *Fire and EMS Development Fee 2014 Law Fund* – This fund was established to account for the inflow of Fire and EMS development fees levied on new residential and commercial construction. This fee can only be used for the purchase, construction, financing and furnishing of new capital or one-time items directly related to the increased demand on Fire and EMS services caused by growth. This fund accounts for the development fees approved to be collected beginning August 1, 2014.
 - *Fire and EMS Development Fee Grandfathered Fund* – This fund was established to account for the inflow of Fire and EMS development fees levied on new residential and commercial construction. This fee can only be used for the purchase, construction, financing and furnishing of new capital or one-time items directly related to the increased demand on Fire and EMS services caused by growth. This fund accounts for the development fees approved to be collected prior to August 1, 2014.
- ❖ Debt service fund –Used to track those activities relating to the issuance and repayment of debt.
- *Debt Service Fund* – This fund was created to track the issuance and repayment of debt.

City of Surprise, Arizona
Combining Balance Sheet
Nonmajor Special Revenue Funds
June 30, 2016

	163rd Ave Development Fee	Employee Dep Scholarship Fund	Grants Fund	LTAF II Fund	Library Development Fee Fund	Marley Park Community Facility District Fund
Assets						
Cash and investments	\$ 40,183	\$ 402	\$ -	\$ -	\$ 4,612,357	\$ 554,931
Receivables (net of allowances)						
Taxes and franchise fees	-	-	-	-	-	6,896
Grants	-	-	540,590	-	-	-
Other	-	-	-	-	-	-
Prepaid items and other assets	-	-	14,753	-	-	-
Restricted cash and investments	-	-	-	-	-	-
Total assets	<u>\$ 40,183</u>	<u>\$ 402</u>	<u>\$ 555,343</u>	<u>\$ -</u>	<u>\$ 4,612,357</u>	<u>\$ 561,827</u>
Liabilities						
Accounts payable	\$ -	\$ -	\$ 106,907	\$ -	\$ -	\$ -
Accrued payroll and related taxes	-	-	-	-	-	-
Due to other funds	-	-	447,944	-	-	-
Deposits	-	-	-	-	-	-
Unearned revenue	-	-	492	-	-	-
Contracts payable	-	-	-	-	-	-
Matured bond interest payable	-	-	-	-	-	221,209
Matured bonds payable	-	-	-	-	-	230,000
Advances from other funds	-	-	-	-	-	-
Total liabilities	<u>-</u>	<u>-</u>	<u>555,343</u>	<u>-</u>	<u>-</u>	<u>451,209</u>
Nonspendable	-	-	14,753	-	-	-
Restricted	39,986	-	-	-	4,572,083	110,618
Committed	-	-	-	-	-	-
Assigned	197	402	-	-	40,274	-
Unassigned	-	-	(14,753)	-	-	-
Total fund balances	<u>40,183</u>	<u>402</u>	<u>-</u>	<u>-</u>	<u>4,612,357</u>	<u>110,618</u>
Total liabilities, deferred inflows and fund balances	<u>\$ 40,183</u>	<u>\$ 402</u>	<u>\$ 555,343</u>	<u>\$ -</u>	<u>\$ 4,612,357</u>	<u>\$ 561,827</u>

City of Surprise, Arizona
Combining Balance Sheet
Nonmajor Special Revenue Funds (Continued)
June 30, 2016

Municipal Court Enhancement Fund	Municipal Court FARE Fund	Municipal Court JCEF Fund	Municipal Court MFTG Fund	Neighborh. Revitaliz. Fund	Net Premium Seating Fund	Parks and Recreation Development Fee Fund
\$ 165,647	\$ 21,196	\$ 17,112	\$ 32,570	\$ -	\$ 60,112	\$ 1,014,132
-	-	-	-	-	-	-
-	-	-	-	391,791	-	-
-	-	-	-	3,572	-	-
-	-	-	-	-	-	-
-	-	-	-	322,450	-	152,347
<u>\$ 165,647</u>	<u>\$ 21,196</u>	<u>\$ 17,112</u>	<u>\$ 32,570</u>	<u>\$ 717,813</u>	<u>\$ 60,112</u>	<u>\$ 1,166,479</u>
\$ 7,095	\$ -	\$ 32	\$ -	\$ 178,765	\$ -	\$ 8,180
-	-	2,189	-	-	-	-
-	-	-	-	-	6,541	-
-	-	-	-	-	-	-
-	-	-	-	539,048	-	-
-	-	-	-	-	-	152,347
-	-	-	-	-	-	-
-	-	-	-	-	-	-
<u>7,095</u>	<u>-</u>	<u>2,221</u>	<u>-</u>	<u>717,813</u>	<u>6,541</u>	<u>160,527</u>
-	-	-	-	-	-	-
157,084	20,595	14,162	32,113	-	43,742	975,237
-	-	-	-	-	-	-
1,468	601	729	457	-	9,829	30,715
-	-	-	-	-	-	-
<u>158,552</u>	<u>21,196</u>	<u>14,891</u>	<u>32,570</u>	<u>-</u>	<u>53,571</u>	<u>1,005,952</u>
<u>\$ 165,647</u>	<u>\$ 21,196</u>	<u>\$ 17,112</u>	<u>\$ 32,570</u>	<u>\$ 717,813</u>	<u>\$ 60,112</u>	<u>\$ 1,166,479</u>

Continued

City of Surprise, Arizona
Combining Balance Sheet
Nonmajor Special Revenue Funds (Continued)
June 30, 2016

	Police Development Fee Fund	Proposition 400 Fund	Public Works Expansion Development Fee Fund	Roads of Regional Significance SPA 2, 4 and 6 Fund	Roads of Regional Significance SPA 3 and 5 Fund	SB1398 Fines Fund
Assets						
Cash and investments	\$ 1,579,123	\$ 47,638	\$ 8,522,458	\$ 2,486,548	\$ 23,682	\$ 22,260
Receivables (net of allowances)						
Taxes and franchise fees	-	-	-	-	-	-
Grants	-	-	-	-	-	-
Other	-	-	17,578	-	-	-
Prepaid items and other assets	-	-	-	-	-	-
Restricted cash and investments	-	-	-	-	-	-
	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total assets	<u>\$ 1,579,123</u>	<u>\$ 47,638</u>	<u>\$ 8,540,036</u>	<u>\$ 2,486,548</u>	<u>\$ 23,682</u>	<u>\$ 22,260</u>
Liabilities						
Accounts payable	\$ -	\$ -	\$ 35,451	\$ -	\$ -	\$ -
Accrued payroll and related taxes	-	-	-	-	-	-
Due to other funds	-	-	-	-	-	-
Deposits	-	-	-	-	-	-
Unearned revenue	-	-	-	-	-	-
Contracts payable	-	-	-	-	-	-
Matured bond interest payable	-	-	-	-	-	-
Matured bonds payable	-	-	-	-	-	-
Advances from other funds	-	-	-	-	-	-
	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total liabilities	<u>-</u>	<u>-</u>	<u>35,451</u>	<u>-</u>	<u>-</u>	<u>-</u>
Nonspendable	-	-	-	-	-	-
Restricted	1,561,801	46,043	8,365,482	2,450,459	23,338	21,799
Committed	-	-	-	-	-	-
Assigned	17,322	1,595	139,103	36,089	344	461
Unassigned	-	-	-	-	-	-
	<u>1,579,123</u>	<u>47,638</u>	<u>8,504,585</u>	<u>2,486,548</u>	<u>23,682</u>	<u>22,260</u>
Total fund balances	<u>1,579,123</u>	<u>47,638</u>	<u>8,504,585</u>	<u>2,486,548</u>	<u>23,682</u>	<u>22,260</u>
Total liabilities, deferred inflows and fund balances	<u>\$ 1,579,123</u>	<u>\$ 47,638</u>	<u>\$ 8,540,036</u>	<u>\$ 2,486,548</u>	<u>\$ 23,682</u>	<u>\$ 22,260</u>

City of Surprise, Arizona
Combining Balance Sheet
Nonmajor Special Revenue Funds (Continued)
June 30, 2016

<u>SPD DEA Fund</u>	<u>SPD RICO Fund</u>	<u>SPD Towing Fund</u>	<u>Spring Training Ticket Surcharge Fund</u>	<u>Street Lighting Districts Fund</u>	<u>Tourism Fund</u>	<u>Fire & EMS Development Fee 2014 Law Fund</u>	<u>Fire & EMS Development Fee Grandfathered Fund</u>	<u>Total Nonmajor Special Revenue Funds</u>
\$ 16,450	\$ -	\$ 236,197	\$ 481,454	\$ 187,145	\$ 271,762	\$ 1,408,728	\$ 2,117	\$ 21,804,204
-	-	-	-	41,927	32,075	-	-	80,898
-	-	-	-	-	-	-	-	932,381
-	-	-	118,546	-	-	-	-	139,696
-	-	-	-	-	-	-	-	14,753
-	1,052,648	-	-	-	-	-	-	1,527,445
<u>\$ 16,450</u>	<u>\$ 1,052,648</u>	<u>\$ 236,197</u>	<u>\$ 600,000</u>	<u>\$ 229,072</u>	<u>\$ 303,837</u>	<u>\$ 1,408,728</u>	<u>\$ 2,117</u>	<u>\$ 24,499,377</u>
\$ -	\$ 12,267	\$ -	\$ -	\$ 204,034	\$ 201	\$ -	\$ -	\$ 552,932
-	-	-	-	-	-	-	-	2,189
-	316,886	-	-	-	-	-	-	771,371
-	1,374	-	-	-	-	-	-	1,374
-	-	-	-	25,038	-	-	-	564,578
-	-	-	-	-	-	-	7,568	159,915
-	-	-	-	-	-	-	-	221,209
-	-	-	-	-	-	-	-	230,000
-	-	-	-	-	-	-	4,585,913	4,585,913
-	330,527	-	-	229,072	201	-	4,593,481	7,089,481
-	-	-	-	-	-	-	-	14,753
16,450	714,131	233,984	590,661	-	-	1,408,728	-	21,398,496
-	-	-	-	-	296,504	-	-	296,504
-	7,990	2,213	9,339	-	7,132	-	-	306,260
-	-	-	-	-	-	-	(4,591,364)	(4,606,117)
<u>16,450</u>	<u>722,121</u>	<u>236,197</u>	<u>600,000</u>	<u>-</u>	<u>303,636</u>	<u>1,408,728</u>	<u>(4,591,364)</u>	<u>17,409,896</u>
<u>\$ 16,450</u>	<u>\$ 1,052,648</u>	<u>\$ 236,197</u>	<u>\$ 600,000</u>	<u>\$ 229,072</u>	<u>\$ 303,837</u>	<u>\$ 1,408,728</u>	<u>\$ 2,117</u>	<u>\$ 24,499,377</u>
								Concluded

City of Surprise, Arizona

Combining Statement of Revenues, Expenditures and Changes in Fund Balance

Nonmajor Special Revenue Funds

June 30, 2016

	163rd Ave Development Fee	Employee Dep Scholarship Fund	Grants Fund	LTAF II Fund	Library Development Fee Fund	Marley Park Community Facility District Fund
Revenues:						
Taxes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 771,023
Intergovernmental	-	-	73,369	354,110	-	-
Charges for services	-	-	-	-	-	-
Grants	-	-	840,961	-	-	-
Fines	-	-	-	-	-	-
Development fees	36,478	-	-	-	-	-
Interest	197	5	-	-	40,274	-
Donations	-	877	-	-	-	-
Other	-	-	-	-	-	-
Total revenues	36,675	882	914,330	354,110	40,274	771,023
Expenditures:						
Current:						
General government	-	3,000	69,481	-	-	62,578
Public safety	-	-	335,106	-	-	-
Public works and streets	-	-	346,069	354,110	-	-
Community development	-	-	22,248	-	-	-
Culture and recreation	-	-	127,429	-	-	-
Capital outlay	-	-	14,000	-	-	-
Debt service						
Principal	-	-	-	-	-	230,000
Interest and fiscal charges	-	-	-	-	-	445,417
Total expenditures	-	3,000	914,333	354,110	-	737,995
Excess (deficiency) of revenues over (under) expenditures	36,675	(2,118)	(3)	-	40,274	33,028
Other financing sources (uses)						
Proceeds from sale of capital assets	-	-	-	-	-	-
Transfers in	-	-	-	-	-	-
Transfers out	-	-	-	-	-	-
Total other financing	-	-	-	-	-	-
Net change in fund balances	36,675	(2,118)	(3)	-	40,274	33,028
Fund balances, beginning	3,508	2,520	3	-	4,572,083	77,590
Fund balances, ending	\$ 40,183	\$ 402	\$ -	\$ -	\$ 4,612,357	\$ 110,618

City of Surprise, Arizona

Combining Statement of Revenues, Expenditures and Changes in Fund Balance (Continued)

Nonmajor Special Revenue Funds

June 30, 2016

Municipal Court Enhancement Fund	Municipal Court FARE Fund	Municipal Court JCEF Fund	Municipal Court MFTG Fund	Neighborh. Revitaliz. Fund	Net Premium Seating Fund	Parks and Recreation Development Fee Fund
\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
-	3,405	-	9,570	-	-	-
-	-	-	-	-	33,750	-
-	-	-	-	1,157,925	-	-
66,125	-	18,473	-	-	-	-
-	-	-	-	-	-	321,619
1,467	182	322	253	-	9,709	11,225
-	-	-	-	-	-	-
-	-	196	-	3,726	-	13
<u>67,592</u>	<u>3,587</u>	<u>18,991</u>	<u>9,823</u>	<u>1,161,651</u>	<u>43,459</u>	<u>332,857</u>
-	-	-	-	-	-	-
78,020	-	63,276	-	-	-	-
-	-	-	-	-	-	-
-	-	-	-	-	-	66,519
-	-	-	-	664,949	-	81,514
-	-	-	-	496,702	50,000	1,952,871
-	-	-	-	-	-	-
-	-	-	-	-	-	-
<u>78,020</u>	<u>-</u>	<u>63,276</u>	<u>-</u>	<u>1,161,651</u>	<u>50,000</u>	<u>2,100,904</u>
<u>(10,428)</u>	<u>3,587</u>	<u>(44,285)</u>	<u>9,823</u>	<u>-</u>	<u>(6,541)</u>	<u>(1,768,047)</u>
-	-	-	-	-	-	-
-	-	-	-	-	-	861,793
-	-	-	-	-	-	(433,233)
-	-	-	-	-	-	428,560
<u>(10,428)</u>	<u>3,587</u>	<u>(44,285)</u>	<u>9,823</u>	<u>-</u>	<u>(6,541)</u>	<u>(1,339,487)</u>
<u>168,980</u>	<u>17,609</u>	<u>59,176</u>	<u>22,747</u>	<u>-</u>	<u>60,112</u>	<u>2,345,439</u>
<u>\$ 158,552</u>	<u>\$ 21,196</u>	<u>\$ 14,891</u>	<u>\$ 32,570</u>	<u>\$ -</u>	<u>\$ 53,571</u>	<u>\$ 1,005,952</u>

Continued

City of Surprise, Arizona

Combining Statement of Revenues, Expenditures and Changes in Fund Balances (Continued)

Nonmajor Special Revenue Funds

June 30, 2016

	Police Development Fee Fund	Proposition 400 Fund	Public Works Expansion Development Fee Fund	Roads of Regional Significance SPA 2, 4 and 6 Fund	Roads of Regional Significance SPA 3 and 5 Fund	SB1398 Fines Fund
Revenues:						
Taxes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Intergovernmental	-	-	-	-	-	-
Charges for services	-	-	-	-	-	-
Grants	-	-	-	-	-	-
Fines	-	-	-	-	-	15,411
Development fees	335,045	-	-	-	-	-
Interest	11,080	859	82,841	21,712	207	434
Donations	-	-	-	-	-	-
Other	4	-	-	-	-	-
Total revenues	346,129	859	82,841	21,712	207	15,845
Expenditures:						
Current:						
General government	-	-	-	-	-	-
Public safety	-	-	-	-	-	54,877
Public works and streets	-	150,596	69,491	-	-	-
Community development	-	-	-	-	-	-
Culture and recreation	-	-	-	-	-	-
Capital outlay	-	-	1,013,340	-	-	-
Debt service	-	-	-	-	-	-
Principal	-	-	-	-	-	-
Interest and fiscal charges	-	-	-	-	-	-
Total expenditures	-	150,596	1,082,831	-	-	54,877
Excess of revenues over expenditures	346,129	(149,737)	(999,990)	21,712	207	(39,032)
Other financing sources						
Proceeds from sale of capital assets	-	29,300	-	-	-	-
Transfers in	266,696	-	-	-	-	-
Transfers out	(134,071)	-	-	-	-	-
Total other financing	132,625	29,300	-	-	-	-
Net change in fund balances	478,754	(120,437)	(999,990)	21,712	207	(39,032)
Fund balances, beginning	1,100,369	168,075	9,504,575	2,464,836	23,475	61,292
Fund balances, ending	\$ 1,579,123	\$ 47,638	\$ 8,504,585	\$ 2,486,548	\$ 23,682	\$ 22,260

City of Surprise, Arizona

Combining Statement of Revenues, Expenditures and Changes in Fund Balances (Continued)

Nonmajor Special Revenue Funds

June 30, 2016

SPD DEA Fund	SPD RICO Fund	SPD Towing Fund	Spring Training Ticket Surcharge Fund	Street Lighting Districts Fund	Tourism Fund	Fire & EMS Development Fee 2014 Law Fund	Fire & EMS Development Fee Grandfathered Fund	Total Nonmajor Special Revenue Funds
\$ -	\$ -	\$ -	\$ -	\$ 2,479,502	\$ 449,587	\$ -	\$ -	\$ 3,700,112
-	-	-	-	-	-	-	-	440,454
-	-	91,950	1,054,054	-	-	-	-	1,179,754
-	-	-	-	-	-	-	-	1,998,886
-	83,501	-	-	-	-	-	-	183,510
-	-	-	-	-	-	977,269	869,417	2,539,828
-	4,916	-	7,687	2,308	4,238	6,339	4,341	210,596
-	-	-	-	-	-	-	-	877
-	13,465	-	-	-	-	-	-	17,404
-	101,882	91,950	1,061,741	2,481,810	453,825	983,608	873,758	10,271,421
-	-	-	-	-	-	-	-	135,059
-	218,521	83,550	-	-	-	-	-	833,350
-	-	-	-	2,481,810	-	-	-	3,402,076
-	-	-	-	-	-	-	7,568	96,335
-	-	-	1,237,680	-	302,643	-	-	2,414,215
-	287,420	-	-	-	-	-	-	3,814,333
-	-	-	-	-	-	-	-	230,000
-	-	-	-	-	-	-	-	445,417
-	505,941	83,550	1,237,680	2,481,810	302,643	-	7,568	11,370,785
-	(404,059)	8,400	(175,939)	-	151,182	983,608	866,190	(1,099,364)
-	-	-	-	-	-	-	-	29,300
-	-	-	-	-	-	-	131,779	1,260,268
-	-	-	-	-	(340,368)	-	(66,246)	(973,918)
-	-	-	-	-	(340,368)	-	65,533	315,650
-	(404,059)	8,400	(175,939)	-	(189,186)	983,608	931,723	(783,714)
16,450	1,126,180	227,797	775,939	-	492,822	425,120	(5,523,087)	18,193,610
\$ 16,450	\$ 722,121	\$ 236,197	\$ 600,000	\$ -	\$ 303,636	\$ 1,408,728	\$ (4,591,364)	\$ 17,409,896
Concluded								

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

163rd Ave Development Fee

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Development fees	\$ 17,800	\$ 17,800	\$ 36,478	\$ 18,678
Interest	-	-	197	197
Total revenues	<u>17,800</u>	<u>17,800</u>	<u>36,675</u>	<u>18,875</u>
Expenditures:				
Current:				
General government	12,500	12,500	-	(12,500)
Budget				
Contingency	<u>1,400</u>	<u>1,400</u>	-	(1,400)
Total expenditures	<u>13,900</u>	<u>13,900</u>	-	(13,900)
Revenues over expenditures	<u>3,900</u>	<u>3,900</u>	<u>36,675</u>	<u>32,775</u>
Net change in fund balance	<u>\$ 3,900</u>	<u>\$ 3,900</u>	<u>\$ 36,675</u>	<u>\$ 32,775</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Employee Dep Scholarship Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Interest	\$ -	\$ -	\$ 5	\$ 5
Donations	1,100	1,100	877	(223)
Total revenues	1,100	1,100	882	(218)
Expenditures:				
Current:				
General government	3,000	3,000	3,000	-
Budget				
Contingency	600	600	-	(600)
Total expenditures	3,600	3,600	3,000	(600)
Revenues (under) expenditures	(2,500)	(2,500)	(2,118)	382
Net change in fund balance	\$ (2,500)	\$ (2,500)	\$ (2,118)	\$ 382

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Grants Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Intergovernmental	\$ 143,000	\$ 125,000	\$ 73,369	\$ (51,631)
Grants	9,005,900	8,450,700	840,961	(7,609,739)
Total revenues	9,148,900	8,575,700	914,330	(7,661,370)
Expenditures:				
Current:				
General government	78,000	120,100	69,481	(50,619)
Public safety	358,000	440,400	335,106	(105,294)
Public works and streets	371,500	410,400	346,069	(64,331)
Community development	-	22,300	22,248	(52)
Culture and recreation	50,000	142,500	127,429	(15,071)
Capital outlay	11,500	14,000	14,000	-
Budget				
Contingency	8,279,900	5,543,700	-	(5,543,700)
Total expenditures	9,148,900	6,693,400	914,333	(5,779,067)
Revenues over (under) expenditures	-	1,882,300	(3)	(1,882,303)
Net change in fund balance	\$ -	\$ 1,882,300	\$ (3)	\$ (1,882,303)

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

LTAF II Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Intergovernmental	\$ 350,000	\$ 354,200	\$ 354,110	\$ (90)
Total revenues	350,000	354,200	354,110	(90)
Expenditures:				
Public works and streets	350,000	354,200	354,110	(90)
Total expenditures	350,000	354,200	354,110	(90)
Revenues over expenditures	-	-	-	-
Net change in fund balance	\$ -	\$ -	\$ -	\$ -

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Library Development Fee Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Interest	\$ -	\$ -	\$ 40,274	\$ 40,274
Expenditures:				
Current:				
General government	25,000	25,000	-	(25,000)
Budget				
Contingency	4,520,400	4,520,400	-	(4,520,400)
Total expenditures	4,545,400	4,545,400	-	(4,545,400)
Revenues over (under) expenditures	(4,545,400)	(4,545,400)	40,274	4,585,674
Net change in fund balance	\$ (4,545,400)	\$ (4,545,400)	\$ 40,274	\$ 4,585,674

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Marley Park Community Facility District Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Taxes	\$ 731,200	\$ 731,200	\$ 771,023	\$ 39,823
Total revenues	731,200	731,200	771,023	39,823
Expenditures:				
Current:				
General government	102,700	99,700	62,578	(37,122)
Debt Service				
Principal	230,000	230,000	230,000	-
Interest and fiscal charges	442,500	445,500	445,417	(83)
Total expenditures	775,200	775,200	737,995	(37,205)
Revenues over (under) expenditures	(44,000)	(44,000)	33,028	77,028
Net change in fund balance	\$ (44,000)	\$ (44,000)	\$ 33,028	\$ 77,028

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Municipal Court Enhancement Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Fines	\$ 97,400	\$ 97,400	\$ 66,125	\$ (31,275)
Interest	-	-	1,467	1,467
Total revenues	97,400	97,400	67,592	(29,808)
Expenditures:				
Current:				
Public safety	85,000	85,000	78,020	(6,980)
Capital outlay	-	29,700	-	(29,700)
Budget				
Contingency	162,600	162,600	-	(162,600)
Total expenditures	247,600	277,300	78,020	(199,280)
Revenues (under) expenditures	(150,200)	(179,900)	(10,428)	169,472
Net change in fund balance	\$ (150,200)	\$ (179,900)	\$ (10,428)	\$ 169,472

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Municipal Court FARE Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Intergovernmental	\$ 4,400	\$ 4,400	\$ 3,405	\$ (995)
Interest	200	200	182	(18)
Total revenues	<u>4,600</u>	<u>4,600</u>	<u>3,587</u>	<u>(1,013)</u>
Expenditures:				
Budget				
Contingency	<u>23,300</u>	<u>23,300</u>	-	(23,300)
Total expenditures	<u>23,300</u>	<u>23,300</u>	-	(23,300)
Revenues over (under) expenditures	<u>(18,700)</u>	<u>(18,700)</u>	<u>3,587</u>	<u>22,287</u>
Net change in fund balance	<u>\$ (18,700)</u>	<u>\$ (18,700)</u>	<u>\$ 3,587</u>	<u>\$ 22,287</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Municipal Court JCEF Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Fines	\$ 23,700	\$ 23,700	\$ 18,473	\$ (5,227)
Interest	1,300	1,300	322	(978)
Other	-	-	196	196
Total revenues	<u>25,000</u>	<u>25,000</u>	<u>18,991</u>	<u>(6,009)</u>
Expenditures:				
Current:				
Public safety	58,000	58,000	63,276	5,276
Budget				
Contingency	<u>25,700</u>	<u>25,700</u>	-	(25,700)
Total expenditures	<u>83,700</u>	<u>83,700</u>	<u>63,276</u>	<u>(20,424)</u>
Revenues (under) expenditures	<u>(58,700)</u>	<u>(58,700)</u>	<u>(44,285)</u>	<u>14,415</u>
Net change in fund balance	<u>\$ (58,700)</u>	<u>\$ (58,700)</u>	<u>\$ (44,285)</u>	<u>\$ 14,415</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Municipal Court MFTG Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Intergovernmental	\$ 13,100	\$ 13,100	\$ 9,570	\$ (3,530)
Interest	400	400	253	(147)
Total revenues	<u>13,500</u>	<u>13,500</u>	<u>9,823</u>	<u>(3,677)</u>
Expenditures:				
Current:				
Public safety	13,100	13,100	-	(13,100)
Budget				
Contingency	24,000	24,000	-	(24,000)
Total expenditures	<u>37,100</u>	<u>37,100</u>	<u>-</u>	<u>(37,100)</u>
Revenues over (under) expenditures	<u>(23,600)</u>	<u>(23,600)</u>	<u>9,823</u>	<u>33,423</u>
Net change in fund balance	<u>\$ (23,600)</u>	<u>\$ (23,600)</u>	<u>\$ 9,823</u>	<u>\$ 33,423</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Neighborh. Revitaliz. Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Grants	\$ 2,220,900	\$ 2,740,800	\$ 1,157,925	\$ (1,582,875)
Other	-	-	3,726	3,726
Total revenues	<u>2,220,900</u>	<u>2,740,800</u>	<u>1,161,651</u>	<u>(1,579,149)</u>
Expenditures:				
Current:				
Culture and recreation	2,220,900	2,740,800	664,949	(2,075,851)
Capital outlay	-	-	496,702	496,702
Total expenditures	<u>2,220,900</u>	<u>2,740,800</u>	<u>1,161,651</u>	<u>(1,579,149)</u>
Revenues over expenditures	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Net change in fund balance	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Net Premium Seating Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Charges for services	\$ 25,000	\$ 25,000	\$ 33,750	\$ 8,750
Interest	-	-	9,709	9,709
Total revenues	<u>25,000</u>	<u>25,000</u>	<u>43,459</u>	<u>18,459</u>
Expenditures:				
Current:				
Culture and recreation	50,000	-	-	-
Capital outlay	-	50,000	50,000	-
Total expenditures	<u>50,000</u>	<u>50,000</u>	<u>50,000</u>	<u>-</u>
Revenues (under) expenditures	<u>(25,000)</u>	<u>(25,000)</u>	<u>(6,541)</u>	<u>18,459</u>
Net change in fund balance	<u>\$ (25,000)</u>	<u>\$ (25,000)</u>	<u>\$ (6,541)</u>	<u>\$ 18,459</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Parks and Recreation Development Fee Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Development fees	\$ 330,500	\$ 330,500	\$ 321,619	\$ (8,881)
Interest	-	-	11,225	11,225
Other	-	-	13	13
Total revenues	<u>330,500</u>	<u>330,500</u>	<u>332,857</u>	<u>2,357</u>
Expenditures:				
Current:				
General government	25,000	25,000	-	(25,000)
Community development	-	65,500	66,519	1,019
Culture and recreation	-	-	81,514	81,514
Capital outlay	2,135,100	2,040,500	1,952,871	(87,629)
Budget				
Contingency	1,153,000	1,087,500	-	(1,087,500)
Total expenditures	<u>3,313,100</u>	<u>3,218,500</u>	<u>2,100,904</u>	<u>(1,117,596)</u>
Revenues (under) expenditures	<u>(2,982,600)</u>	<u>(2,888,000)</u>	<u>(1,768,047)</u>	<u>1,119,953</u>
Other financing sources (uses)				
Transfers in	(103,100)	861,795	861,793	(2)
Transfers out	(337,600)	(433,233)	(433,233)	-
Total other financing sources (uses)	<u>(440,700)</u>	<u>428,562</u>	<u>428,560</u>	<u>(2)</u>
Net change in fund balance	<u>\$ (3,423,300)</u>	<u>\$ (2,459,438)</u>	<u>\$ (1,339,487)</u>	<u>\$ 1,119,951</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Police Development Fee Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Development fees	\$ 217,600	\$ 217,600	\$ 335,045	\$ 117,445
Interest	-	-	11,080	11,080
Other	-	-	4	4
Total revenues	<u>217,600</u>	<u>217,600</u>	<u>346,129</u>	<u>128,529</u>
Expenditures:				
Current:				
General government	25,000	25,000	-	(25,000)
Budget				
Contingency	<u>1,414,900</u>	<u>1,414,900</u>	-	(1,414,900)
Total expenditures	<u>1,439,900</u>	<u>1,439,900</u>	-	(1,439,900)
Revenues over (under) expenditures	<u>(1,222,300)</u>	<u>(1,222,300)</u>	<u>346,129</u>	<u>1,568,429</u>
Other financing sources (uses)				
Transfers in	-	266,696	266,696	-
Transfers out	<u>(136,400)</u>	<u>(134,071)</u>	<u>(134,071)</u>	-
Total other financing sources (uses)	<u>(136,400)</u>	<u>132,625</u>	<u>132,625</u>	-
Net change in fund balance	<u>\$ (1,358,700)</u>	<u>\$ (1,089,675)</u>	<u>\$ 478,754</u>	<u>\$ 1,568,429</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Proposition 400 Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Interest	\$ -	\$ -	\$ 859	\$ 859
Total revenues	-	-	859	859
Expenditures:				
Current:				
Public works and streets	155,200	155,200	150,596	(4,604)
Budget				
Contingency	12,100	12,100	-	(12,100)
Total expenditures	167,300	167,300	150,596	(16,704)
Revenues (under) expenditures	(167,300)	(167,300)	(149,737)	17,563
Other financing sources				
Proceeds from sale of capital assets	-	-	29,300	29,300
Net change in fund balance	\$ (167,300)	\$ (167,300)	\$ (120,437)	\$ 46,863

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Public Works Expansion Development Fee Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Interest	\$ -	\$ -	\$ 82,841	\$ 82,841
Total revenues	-	-	82,841	82,841
Expenditures:				
Current:				
General government	25,000	25,000	-	(25,000)
Public works and streets	4,431,600	4,387,900	69,491	(4,318,409)
Capital outlay	345,400	1,328,600	1,013,340	(315,260)
Budget				
Contingency	4,797,800	3,814,600	-	(3,814,600)
Total expenditures	9,599,800	9,556,100	1,082,831	(8,473,269)
Revenues (under) expenditures	(9,599,800)	(9,556,100)	(999,990)	8,556,110
Net change in fund balance	\$ (9,599,800)	\$ (9,556,100)	\$ (999,990)	\$ 8,556,110

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Roads of Regional Significance SPA 2, 4 and 6 Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Interest	\$ -	\$ -	\$ 21,712	\$ 21,712
Total revenues	-	-	21,712	21,712
Expenditures:				
Budget				
Contingency	2,450,500	2,450,500	-	(2,450,500)
Total expenditures	2,450,500	2,450,500	-	(2,450,500)
Revenues over (under) expenditures	(2,450,500)	(2,450,500)	21,712	2,472,212
Net change in fund balance	\$ (2,450,500)	\$ (2,450,500)	\$ 21,712	\$ 2,472,212

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Roads of Regional Significance SPA 3 and 5 Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Interest	\$ -	\$ -	\$ 207	\$ 207
Total revenues	-	-	207	207
Expenditures:				
Current:				
General government	12,500	12,500	-	(12,500)
Budget				
Contingency	10,800	10,800	-	(10,800)
Total expenditures	23,300	23,300	-	(23,300)
Revenues over (under) expenditures	(23,300)	(23,300)	207	23,507
Net change in fund balance	\$ (23,300)	\$ (23,300)	\$ 207	\$ 23,507

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

SB 1398 Fines Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Fines	\$ 18,300	\$ 18,300	\$ 15,411	\$ (2,889)
Interest	-	-	434	434
Total revenues	18,300	18,300	15,845	(2,455)
Expenditures:				
Current:				
Public safety	42,800	54,900	54,877	(23)
Budget				
Contingency	17,000	4,900	-	(4,900)
Total expenditures	59,800	59,800	54,877	(4,923)
Revenues (under) expenditures	(41,500)	(41,500)	(39,032)	2,468
Net change in fund balance	\$ (41,500)	\$ (41,500)	\$ (39,032)	\$ 2,468

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

SPD RICO Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Fines	\$ 245,000	\$ 245,000	\$ 83,501	\$ (161,499)
Interest	-	-	4,916	4,916
Other	-	-	13,465	13,465
Total revenues	<u>245,000</u>	<u>245,000</u>	<u>101,882</u>	<u>(143,118)</u>
Expenditures:				
Current:				
Public safety	710,000	457,500	218,521	(238,979)
Capital outlay	-	252,500	287,420	34,920
Budget				
Contingency	120,300	120,300	-	(120,300)
Total expenditures	<u>830,300</u>	<u>830,300</u>	<u>505,941</u>	<u>(324,359)</u>
Revenues (under) expenditures	<u>(585,300)</u>	<u>(585,300)</u>	<u>(404,059)</u>	<u>181,241</u>
Net change in fund balance	<u>\$ (585,300)</u>	<u>\$ (585,300)</u>	<u>\$ (404,059)</u>	<u>\$ 181,241</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

SPD Towing Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Charges for services	\$ 105,000	\$ 105,000	\$ 91,950	\$ (13,050)
Total revenues	105,000	105,000	91,950	(13,050)
Expenditures:				
Current:				
Public safety	82,500	83,900	83,550	(350)
Budget				
Contingency	119,800	118,400	-	(118,400)
Total expenditures	202,300	202,300	83,550	(118,750)
Revenues over (under) expenditures	(97,300)	(97,300)	8,400	105,700
Net change in fund balance	\$ (97,300)	\$ (97,300)	\$ 8,400	\$ 105,700

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Spring Training Ticket Surcharge Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Charges for services	\$ 635,000	\$ 635,000	\$ 1,054,054	\$ 419,054
Interest income (loss)	-	-	7,687	7,687
Total revenues	<u>635,000</u>	<u>635,000</u>	<u>1,061,741</u>	<u>426,741</u>
Expenditures:				
Current:				
Culture and recreation	-	1,237,700	1,237,680	(20)
Total expenditures	<u>-</u>	<u>1,237,700</u>	<u>1,237,680</u>	<u>(20)</u>
Revenues over (under) expenditures	<u>635,000</u>	<u>(602,700)</u>	<u>(175,939)</u>	<u>426,761</u>
Other financing (uses)				
Transfers out	(645,000)	-	-	-
Net change in fund balance	<u>\$ (10,000)</u>	<u>\$ (602,700)</u>	<u>\$ (175,939)</u>	<u>\$ 426,761</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Street Lighting Districts Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Taxes	\$ 2,416,600	\$ 2,416,600	\$ 2,479,502	\$ 62,902
Interest	-	-	2,308	2,308
Total revenues	<u>2,416,600</u>	<u>2,416,600</u>	<u>2,481,810</u>	<u>65,210</u>
Expenditures:				
Current:				
Public works and streets	<u>2,520,400</u>	<u>2,547,400</u>	<u>2,481,810</u>	<u>(65,590)</u>
Total expenditures	<u>2,520,400</u>	<u>2,547,400</u>	<u>2,481,810</u>	<u>(65,590)</u>
Revenues (under) expenditures	<u>(103,800)</u>	<u>(130,800)</u>	<u>-</u>	<u>130,800</u>
Net change in fund balance	<u>\$ (103,800)</u>	<u>\$ (130,800)</u>	<u>\$ -</u>	<u>\$ 130,800</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Tourism Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Taxes	\$ 215,200	\$ 215,200	\$ 449,587	\$ 234,387
Interest	-	-	4,238	4,238
Total revenues	215,200	215,200	453,825	238,625
Expenditures:				
Current:				
Culture and recreation	345,100	289,300	302,643	13,343
Budget				
Contingency	469,600	469,600	-	(469,600)
Total expenditures	814,700	758,900	302,643	(456,257)
Revenues over (under) expenditures	(599,500)	(543,700)	151,182	694,882
Other financing (uses)				
Transfers out	-	(340,368)	(340,368)	-
Total other financing (uses)	-	(340,368)	(340,368)	-
Net change in fund balance	\$ (599,500)	\$ (884,068)	\$ (189,186)	\$ 694,882

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Fire & EMS Development Fee 2014 Law Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Development fees	\$ 662,400	\$ 662,400	\$ 977,269	\$ 314,869
Interest	-	-	6,339	6,339
Total revenues	<u>662,400</u>	<u>662,400</u>	<u>983,608</u>	<u>321,208</u>
Expenditures:				
Current:				
General government	12,500	12,500	-	(12,500)
Budget				
Contingency	<u>1,137,000</u>	<u>1,137,000</u>	-	(1,137,000)
Total expenditures	<u>1,149,500</u>	<u>1,149,500</u>	-	(1,149,500)
Revenues over (under) expenditures	<u>(487,100)</u>	<u>(487,100)</u>	<u>983,608</u>	<u>1,470,708</u>
Other financing sources (uses)				
Transfers out	<u>(8,100)</u>	-	-	-
Net change in fund balance	<u>\$ (495,200)</u>	<u>\$ (31,393)</u>	<u>\$ 983,608</u>	<u>\$ 1,015,001</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Fire & EMS Development Fee Grandfathered Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Development fees	\$ 589,800	\$ 589,800	\$ 869,417	\$ 279,617
Interest	-	-	4,341	4,341
Total revenues	<u>589,800</u>	<u>589,800</u>	<u>873,758</u>	<u>283,958</u>
Expenditures:				
Current:				
General government	12,500	21,200	-	(21,200)
Community development	-	-	7,568	7,568
Budget				
Contingency	<u>1,159,700</u>	<u>1,151,000</u>	<u>-</u>	<u>(1,151,000)</u>
Total expenditures	<u>1,172,200</u>	<u>1,172,200</u>	<u>7,568</u>	<u>(1,164,632)</u>
Revenues over (under) expenditures	<u>(582,400)</u>	<u>(582,400)</u>	<u>866,190</u>	<u>1,448,590</u>
Other financing sources (uses)				
Transfers in	-	131,776	131,779	3
Transfers out	<u>(59,300)</u>	<u>(521,954)</u>	<u>(66,246)</u>	<u>455,708</u>
Total other financing sources (uses)	<u>(59,300)</u>	<u>(390,178)</u>	<u>65,533</u>	<u>455,711</u>
Net change in fund balance	<u>\$ (641,700)</u>	<u>\$ (972,578)</u>	<u>\$ 931,723</u>	<u>\$ 1,904,301</u>

City of Surprise, Arizona

Schedule of Revenues, Expenditures and Changes in Fund Balance – Budget to Actual

Debt Service Fund

Fiscal Year Ended June 30, 2016

	Budgeted Amounts		Actual	Variance with
	Original	Final	Amounts	Final Budget
				Over
				(Under)
Revenues:				
Interest	\$ -	\$ -	\$ 31,848	\$ 31,848
Total revenues	-	-	31,848	31,848
Expenditures:				
Debt Service				
Principal	1,938,600	2,131,400	2,131,425	25
Interest and fiscal charges	1,255,100	1,304,300	1,304,151	(149)
Debt issuance costs	-	19,900	19,762	(138)
Total expenditures	3,193,700	3,455,600	3,455,338	(262)
Revenues (under) expenditures	(3,193,700)	(3,455,600)	(3,423,490)	32,110
Other financing sources (uses)				
Transfers in	3,193,700	3,425,812	3,425,812	-
Transfers out	-	(3,647,596)	(3,647,596)	-
Total other financing sources (uses)	3,193,700	(221,784)	(221,784)	-
Net change in fund balance	\$ -	\$ (3,677,384)	\$ (3,645,274)	\$ 32,110

INTERNAL SERVICE FUND DESCRIPTIONS

- ❖ Internal service funds – These funds are used to track those transactions relating to the City’s internal insurance activities.
 - *Employee Healthcare Fund* – This fund was created to provide health insurance claims, plan administration, stop loss premiums, and fund reserves.
 - *Risk Management Fund* – This fund was created to provide general insurance coverage as well as risk management, loss control, and safety programs citywide.

City of Surprise, Arizona
Combining Statement of Net Position
Internal Service Funds
Fiscal Year Ended June 30, 2016

	Governmental Activities		
	Employee Healthcare Fund	Risk Management Fund	Total Internal Service Funds
Assets			
Current assets			
Cash and investments	\$ 5,200,375	\$ 2,277,995	\$ 7,478,370
Receivables (net of allowances)			
Other assets	1,110	-	1,110
Total current assets	5,201,485	2,277,995	7,479,480
Total assets	5,201,485	2,277,995	7,479,480
Deferred Outflows of Resources			
Pension related	21,639	53,627	75,266
Liabilities			
Current liabilities:			
Accounts payable	5,045	10,340	15,385
Accrued payroll and related taxes	3,140	7,301	10,441
Claims payable	1,226,062	419,263	1,645,325
Compensated absences payable	1,149	3,788	4,937
Total current liabilities	1,235,396	440,692	1,676,088
Noncurrent liabilities:			
Compensated absences payable, due in more than one year	1,586	5,231	6,817
Net pension liability	116,935	289,795	406,730
Total noncurrent liabilities	118,521	295,026	413,547
Total liabilities	1,353,917	735,718	2,089,635
Deferred Inflows of Resources			
Pension related	9,876	24,473	34,349
Net Position			
Unrestricted	3,859,331	1,571,431	5,430,762
Total net position	\$ 3,859,331	\$ 1,571,431	\$ 5,430,762

City of Surprise, Arizona

Combining Statement of Revenues, Expenses and Changes in Fund Net Position

Internal Service Funds

Fiscal Year Ended June 30, 2016

	Governmental Activities		
	Employee Healthcare Fund	Risk Management Fund	Total Internal Service Funds
Operating Revenues:			
Charges for services	\$ 10,738,168	\$ 1,658,856	\$ 12,397,024
Operating Expenses:			
Cost of sales and services	10,071,961	2,057,372	12,129,333
Total operating expenses	10,071,961	2,057,372	12,129,333
Operating income (loss)	666,207	(398,516)	267,691
Non-operating revenues			
Interest revenue	83,754	20,463	104,217
Total non-operating revenues	83,754	20,463	104,217
Changes in net position	749,961	(378,053)	371,908
Net position, beginning	3,109,370	1,949,484	5,058,854
Net position, ending	\$ 3,859,331	\$ 1,571,431	\$ 5,430,762

City of Surprise, Arizona
Combining Statement of Cash Flows
Internal Service Funds
Fiscal Year Ended June 30, 2016

	Governmental Activities		
	Employee Healthcare Fund	Risk Management Fund	Total Internal Service Funds
Cash flows from operating activities			
Cash received from customers	\$ 10,738,966	\$ 1,658,856	\$ 12,397,822
Cash paid to suppliers	(10,287,757)	(1,644,884)	(11,932,641)
Cash paid to employees	(99,826)	(276,431)	(376,257)
Net cash provided by (used in) operating activities	351,383	(262,459)	88,924
Cash flows from investing activities			
Cash received from interest income	83,754	20,463	104,217
Net cash provided by investing activities	83,754	20,463	104,217
Net change in cash	435,137	(241,996)	193,141
Cash, beginning of year	4,765,238	2,519,991	7,285,229
Cash, end of year	<u>\$ 5,200,375</u>	<u>\$ 2,277,995</u>	<u>\$ 7,478,370</u>
Reconciliation of operating income (loss) to net cash provided by (used in) operating activities			
Operating income (loss)	\$ 666,207	\$ (398,516)	\$ 267,691
Adjustments to reconcile operating income (loss) to net cash provided by (used in) operating activities			
(Increase) in assets:			
Accounts receivable	798	-	798
Other assets	292	-	292
Increase (decrease) in liabilities:			
Accounts payable	(5,765)	(298,499)	(304,264)
Accrued payroll and related taxes	800	2,274	3,074
Net pension liability	3,136	6,098	9,234
Claims payable	(312,399)	419,263	106,864
Compensated absences payable	(1,686)	6,921	5,235
Total adjustments	<u>(314,824)</u>	<u>136,057</u>	<u>(178,767)</u>
Net cash provided by (used in) operating activities	<u>\$ 351,383</u>	<u>\$ (262,459)</u>	<u>\$ 88,924</u>



STATISTICAL SECTION

This section provides detailed information, for purposes of providing a context for comprehending the information presented in the financial statements, note disclosures and required supplementary information, and gaining a better understanding of the financial shape of the City of Surprise, Arizona

Contents:

Financial Trends:

These schedules contain trend information to help the reader understand how the City's financial performance and well-being have changed over time.

Revenue Capacity:

These schedules contain information to help the reader assess the government's most significant local revenue sources, transaction privilege (sales) tax and property taxes.

Debt Capacity:

These schedules present information to help the reader assess the affordability of the government's current levels of outstanding debt and the government's ability to issue additional debt in the future.

Demographic and Economic Information:

These schedules of demographic and economic indicators help the reader understand the environment that the government's financial activities take place.

Operating Information:

These schedules contain service and infrastructure data to help the reader understand how the information in the government's financial report relates to the services the government provides and the activities it performs.

Sources: Unless otherwise noted, the information in these schedules is derived from the Comprehensive Annual Reports for the relevant year.

City of Surprise, Arizona
Changes in Net Position
Last Ten Fiscal Years
(accrual basis of accounting)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
<u>Expenses</u>										
Governmental Activities:										
General government	\$ 16,453,191	\$ 18,230,474	\$ 20,248,301	\$ 21,961,410	\$ 18,092,847	\$ 17,438,582	\$ 14,958,702	\$ 16,079,202	\$ 21,038,892	\$ 18,906,430
Public safety	27,987,949	34,962,539	39,409,554	33,876,919	38,760,889	39,628,843	39,096,150	40,931,709	44,415,505	47,273,449
Public works & streets (including SLIDs)	20,868,755	25,092,309	26,621,704	28,392,783	29,748,611	29,415,043	33,710,624	34,988,682	35,141,030	38,670,796
Community development	5,244,991	5,237,442	4,824,047	6,484,414	4,915,385	7,401,566	7,668,373	8,388,639	5,205,925	10,235,430
Culture and recreation	17,809,127	19,972,094	21,138,623	16,399,646	15,229,013	16,189,568	16,285,289	17,228,719	21,863,417	25,690,406
Interest	2,706,394	5,047,505	5,124,808	2,044,603	1,919,145	1,594,060	1,505,313	1,378,709	1,635,320	1,472,910
Total governmental activities expenses	91,070,407	108,542,363	117,367,037	109,159,775	108,665,890	111,667,662	113,224,451	118,995,660	129,300,089	142,249,421
Business-type Activities:										
Water	6,486,400	7,060,228	11,629,143	9,792,043	11,188,199	10,792,041	10,849,653	10,546,378	10,619,858	11,823,538
Sewer	10,765,370	11,021,010	16,315,148	16,665,251	20,090,934	19,325,017	18,717,547	20,072,400	20,360,031	20,399,067
Sanitation	3,542,024	4,015,174	4,269,858	4,559,778	5,603,983	6,047,844	5,934,789	7,144,521	7,883,309	7,972,061
Replenishment	628,514	1,585,734	-	-	-	-	-	-	-	-
Total business-type activities	21,422,308	23,682,146	32,214,149	31,017,072	36,883,116	36,164,902	35,501,989	37,763,299	38,863,198	40,194,666
Total primary government expenses	\$ 112,492,715	\$ 132,224,509	\$ 149,581,186	\$ 140,176,847	\$ 145,549,006	\$ 147,832,564	\$ 148,726,440	\$ 156,758,959	\$ 168,163,287	\$ 182,444,087
<u>Program Revenues</u>										
Governmental Activities:										
Charges for services:										
General government	\$ 4,981,861	\$ 7,468,412	\$ 7,762,750	\$ 5,630,748	\$ 7,947,615	\$ 6,435,843	\$ 6,313,245	\$ 8,494,212	\$ 5,301,697	\$ 5,041,335
Public safety	1,719,969	2,409,665	3,132,368	1,257,537	1,522,658	3,096,058	2,922,055	1,306,553	2,963,326	3,778,584
Public works & streets (including SLIDs)	4,165,635	4,017,706	3,004,313	328,230	3,786,620	3,238,179	792,288	499,338	507,198	853,321
Community development	5,527,926	3,441,463	1,436,629	868,305	1,315,799	1,622,594	2,003,777	1,697,315	2,005,421	2,552,293
Culture and recreation	2,474,416	2,903,069	3,539,257	3,783,816	3,838,003	5,307,491	4,837,786	4,917,918	5,313,203	5,894,021
Operating grants and contributions	2,414,175	2,268,074	1,774,977	13,157,726	10,404,916	8,207,130	10,139,981	9,833,470	9,908,788	11,178,339
Capital grants and contributions	44,804,100	43,039,657	21,552,356	31,142,608	8,655,730	32,449,260	5,925,348	2,877,937	11,561,202	11,558,409
Total governmental activities program revenues	66,088,082	65,548,046	42,202,650	56,168,970	37,471,341	60,356,555	32,934,480	29,626,743	37,560,835	40,856,302
Business-type activities:										
Charges for services:										
Water	7,737,813	8,683,732	10,282,626	9,711,411	9,841,874	10,047,169	10,073,124	9,987,819	10,814,903	12,195,621
Sewer	12,367,546	12,990,898	13,587,358	14,857,689	15,303,709	15,481,721	15,904,030	16,046,564	17,950,085	16,151,096
Sanitation	4,573,178	5,280,028	5,627,829	6,175,989	6,598,929	6,700,961	6,862,696	7,000,935	6,952,296	7,099,896
Replenishment	796,503	771,602	-	-	-	-	-	-	-	-
Capital grants and contributions	25,616,242	22,488,762	12,856,449	51,714,784	16,878,654	14,502,214	4,427,857	3,270,131	129,722	3,107,265
Total business-type activities program revenues	51,091,282	50,215,022	42,354,262	82,459,873	48,623,166	46,732,065	37,267,707	36,305,449	35,847,006	38,553,878
Total primary government program revenues	\$ 117,179,364	\$ 115,763,068	\$ 84,556,912	\$ 138,628,843	\$ 86,094,507	\$ 107,088,620	\$ 70,202,187	\$ 65,932,192	\$ 73,407,841	\$ 79,410,180
Net revenue/expense:										
Governmental activities	\$ (24,982,325)	\$ (42,994,317)	\$ (75,164,387)	\$ (52,990,805)	\$ (71,194,549)	\$ (51,311,107)	\$ (80,289,971)	\$ (89,368,917)	\$ (91,739,254)	\$ (101,393,119)
Business-type activities	29,668,974	26,532,876	10,140,113	51,442,801	11,740,050	10,567,163	1,765,718	(1,457,850)	(3,016,192)	(1,640,788)
Total primary government net expense	\$ 4,686,649	\$ (16,461,441)	\$ (65,024,275)	\$ (1,548,004)	\$ (59,454,499)	\$ (40,743,944)	\$ (78,524,253)	\$ (90,826,767)	\$ (94,755,446)	\$ (103,033,907)

General Revenues and Other Changes in Net Position

Governmental activities:											
Taxes											
Property taxes	\$ 6,728,647	\$ 7,379,236	\$ 7,403,211	\$ 6,831,553	\$ 7,018,180	\$ 6,112,789	\$ 9,274,735	\$ 9,401,277	\$ 9,713,903	\$ 9,962,925	
Sales taxes	45,707,048	39,336,323	33,241,899	29,144,497	29,826,572	33,266,049	37,836,088	39,685,844	42,111,177	46,807,817	
Franchise taxes	3,602,776	3,907,778	4,073,771	4,309,896	4,448,614	4,547,621	4,732,649	5,159,956	5,249,320	5,062,719	
State shared revenue	19,247,219	20,808,942	20,546,483	21,234,739	18,767,966	23,434,911	25,983,982	26,722,541	29,879,804	30,560,635	
Unrestricted investment earnings	7,218,793	3,959,328	422,965	414,492	488,919	304,846	164,984	329,637	400,260	607,602	
Other	1,824,746	1,437,163	3,545,306	1,425,472	489,667	297,016	562,787	482,776	1,146,649	407,445	
Transfers	(36,469,155)	4,078,000	4,050,107	(6,195,179)	946,818	968,148	1,068,522	1,147,181	1,132,145	201,576	
Total governmental activities	47,860,074	80,906,770	73,283,742	57,165,470	61,986,736	68,931,380	79,623,747	82,929,212	89,633,258	93,610,719	
Business-type activities:											
Unrestricted investment earnings	4,053,513	2,344,100	365,454	423,050	552,583	331,127	150,350	296,183	253,407	319,068	
Other	-	-	-	110,149	483,773	-	-	-	-	-	
Special item - Extinguishment of debt	-	-	-	2,821,348	-	-	-	-	-	-	
Transfers	36,469,155	(4,078,000)	(4,373,199)	6,195,179	(946,818)	(968,148)	(1,068,522)	(1,147,181)	(1,132,145)	(201,576)	
Total business-type activities	40,522,668	(1,733,900)	(4,007,745)	9,549,726	89,538	(637,021)	(918,172)	(850,998)	(878,738)	117,492	
Total primary government	\$ 88,382,742	\$ 79,172,870	\$ 69,275,997	\$ 66,715,196	\$ 62,076,274	\$ 68,294,359	\$ 78,705,575	\$ 82,078,214	\$ 88,754,520	\$ 93,728,211	
Change in Net Position											
Governmental activities	\$ 22,877,749	\$ 37,912,453	\$ (1,880,645)	\$ 4,174,665	\$ (9,207,813)	\$ 17,620,273	\$ (666,224)	\$ (6,439,705)	\$ (2,105,996)	\$ (7,782,400)	
Business-type activities	70,191,642	24,798,976	6,132,368	60,992,527	11,829,588	9,930,142	847,546	(2,308,848)	(3,894,930)	(1,523,296)	
Prior period adjustments	21,653,107	(3,430,317)	(3,430,317)	-	-	-	-	-	-	-	
Total primary government	\$ 114,722,498	\$ 59,281,112	\$ 821,405	\$ 65,167,192	\$ 2,621,775	\$ 27,550,415	\$ 181,322	\$ (8,748,553)	\$ (6,000,926)	\$ (9,305,696)	

Source: The source of this information is the City's financial records.

City of Surprise, Arizona
Fund Balances of Governmental Funds
Last Ten Years
(modified accrual basis of accounting)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
General fund										
Nonspendable	\$ -	\$ -	\$ -	\$ -	\$ 327,420	\$ 637,513	\$ 626,565	\$ 821,009	\$ 1,313,505	\$ 1,287,510
Restricted	-	-	-	-	129,117	79,170	77,439	66,385	-	-
Committed	-	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	1,334,202	317,343	327,182	360,030	578,518	542,821
Unassigned	-	-	-	-	239,533	4,459,773	17,166,622	26,849,205	34,324,717	37,385,696
Reserved	-	56,667	4,048,909	2,692,681	-	-	-	-	-	-
Unreserved	31,570,113	31,766,001	17,105,789	12,527,329	-	-	-	-	-	-
Total general fund	\$ 31,570,113	\$ 31,822,668	\$ 21,154,698	\$ 15,220,010	\$ 2,030,272	\$ 5,493,799	\$ 18,197,808	\$ 28,096,629	\$ 36,216,740	\$ 39,216,027
All other governmental funds										
Nonspendable	\$ -	\$ -	\$ -	\$ -	\$ 125,744	\$ 106,844	\$ 134,673	\$ 206,294	\$ 195,374	\$ 368,126
Restricted	-	-	-	-	27,151,070	26,932,579	28,027,995	29,584,573	46,848,361	23,064,256
Committed	-	-	-	-	7,767,079	7,915,957	7,266,032	47,607,527	42,241,616	40,246,190
Assigned	-	-	-	-	41,951,897	42,460,372	44,505,144	1,173,198	1,209,403	469,830
Unassigned	-	-	-	-	(50,850,735)	(50,409,260)	(49,901,573)	(50,029,315)	(49,288,936)	(47,671,784)
Reserved	2,289,308	2,289,307	2,289,308	57,870,335	-	-	-	-	-	-
Unreserved, reported in:										
Special revenue funds	36,752,608	37,336,735	22,123,789	(37,216,769)	-	-	-	-	-	-
Capital projects funds	58,960,539	21,474,937	2,895,166	(8,724,406)	-	-	-	-	-	-
Debt service funds	651,086	555,713	27,832	6,236,019	-	-	-	-	-	-
Total all other governmental funds	\$ 98,653,541	\$ 61,656,692	\$ 27,336,095	\$ 18,165,179	\$ 26,145,055	\$ 27,006,492	\$ 30,032,271	\$ 28,542,277	\$ 41,205,818	\$ 16,476,618

Source: The source of this information is the City's financial records.

Note: GASB 54 established new categories for reporting fund balance.

City of Surprise, Arizona
Changes in Fund Balances of Governmental Funds
Last Ten Years
(modified accrual basis of accounting)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Revenues										
Taxes	\$ 52,439,926	\$ 46,715,559	\$ 40,645,112	\$ 38,940,670	\$ 39,445,440	\$ 42,290,109	\$ 47,442,186	\$ 48,262,126	\$ 52,178,522	\$ 56,908,903
Licenses and permits	3,602,764	3,907,778	4,073,771	4,342,546	4,490,664	4,586,621	4,771,649	5,197,956	4,975,398	5,121,719
Intergovernmental	29,416,541	30,539,662	29,229,811	28,985,886	25,743,085	30,476,028	33,441,035	35,923,296	37,947,604	39,209,688
Charges for services	9,811,846	8,198,304	9,511,853	4,963,482	5,708,552	7,052,487	7,943,039	7,896,783	9,241,853	11,363,453
Grants	1,707,016	1,881,543	1,314,944	2,855,614	3,010,650	1,626,534	2,443,199	2,131,707	1,659,609	3,060,620
Fines	1,222,791	1,348,307	1,862,634	1,930,945	1,827,127	1,870,202	1,986,692	1,498,451	1,768,671	1,214,978
Rents	5,224,704	7,844,593	7,789,822	4,000,944	611,019	580,820	584,972	606,679	549,400	630,514
Development fees	10,565,562	8,910,391	3,929,986	1,721,280	2,494,845	2,415,290	2,240,664	1,790,461	2,224,125	3,297,082
Interest	7,138,672	3,894,950	403,629	391,530	464,496	278,177	149,655	307,139	400,260	607,602
Special assessments*	1,420,634	1,442,179	2,186,412	-	-	-	-	-	-	-
Donations	-	-	-	-	429,237	257,372	344,589	148,062	245,671	228,316
Indirect charges**	-	-	-	-	3,660,700	3,660,700	3,660,700	4,682,772	4,682,772	4,884,443
Other	3,501,040	3,831,556	1,451,216	2,286,355	2,047,634	1,175,823	960,297	482,776	1,155,192	392,199
Total revenues	126,051,496	118,514,822	102,399,190	90,419,252	89,933,449	96,270,163	105,968,677	108,928,208	117,029,077	126,919,517
Expenditures										
Current										
General government	15,612,055	17,221,315	17,770,249	17,750,497	12,073,329	12,627,722	11,925,890	13,674,046	20,291,986	16,306,183
Public safety	26,203,451	31,932,891	34,769,733	30,461,294	34,968,406	35,592,854	35,984,984	38,018,470	41,862,877	44,433,546
Public works and streets (incl. SLIDS)	12,655,253	15,145,796	14,831,441	15,573,166	15,425,981	14,706,512	15,350,181	16,784,098	17,314,612	20,492,467
Community development	4,906,263	5,179,121	4,707,176	6,447,218	4,802,971	7,336,377	7,605,656	8,344,991	5,074,395	10,080,446
Culture and recreation	15,537,728	17,326,488	18,110,338	13,393,070	12,373,798	13,421,538	13,210,175	14,912,746	19,301,123	18,416,339
Capital outlay	77,435,948	67,295,318	56,371,993	12,918,988	6,186,111	5,177,828	3,215,160	6,409,054	8,604,468	36,511,052
Debt Service										
Principal	3,683,399	4,123,668	3,376,652	2,137,075	2,328,300	2,449,900	2,533,138	2,661,713	2,786,800	2,361,425
Interest	2,519,077	4,806,074	4,987,153	1,973,329	1,898,152	1,594,060	1,505,313	1,378,709	1,245,447	1,749,568
Other charges	1,747,390	256,445	231,221	-	-	-	-	-	389,873	19,762
Total expenditures	160,300,564	163,287,116	155,155,956	100,654,637	90,057,048	92,906,791	91,330,497	102,183,827	116,871,581	150,370,788
Excess of revenues over (under) expenses	(34,249,068)	(44,772,294)	(52,756,766)	(10,235,385)	(123,599)	3,363,372	14,638,180	6,744,381	157,496	(23,451,271)
Other financing sources (uses)										
Proceeds from sale of capital assets	-	-	-	-	-	-	33,035	240,830	226,080	336,821
Transfers in (out)	(36,469,155)	4,078,000	4,373,199	(6,167,991)	946,818	968,148	1,068,522	4,803,747	1,132,145	1,150,009
From bonding	52,133,243	3,950,000	3,395,000	-	-	-	-	(3,656,566)	19,320,205	-
Total other financing sources (uses)	15,664,088	8,028,000	7,768,199	(6,167,991)	946,818	968,148	1,101,557	1,388,011	20,678,430	1,486,830
Net change in fund balances	\$ (18,584,980)	\$ (36,744,294)	\$ (44,988,567)	\$ (16,403,376)	\$ 823,219	\$ 4,331,520	\$ 15,739,737	\$ 8,132,392	\$ 20,835,926	\$ (21,964,441)
Debt service as a percentage of noncapital expenditures***	9.6%	9.6%	8.7%	4.7%	5.0%	4.6%	4.6%	4.2%	3.7%	3.5%

Source: The source of this information is the City's financial records.

* Beginning in fiscal year 2010, the revenue related to Street Light Improvement Districts are reflected in the special assessments category rather than charges for services as in previous years.

** Beginning in fiscal year 2011, indirect charges are shown as revenue rather than transfers in.

*** Beginning in fiscal year 2010, the debt related to the sewer fund was properly reported in the sewer fund, which decreases the percentage of debt reported for governmental funds.

City of Surprise, Arizona
Governmental Activities Tax Revenues by Source
Last Ten Fiscal Years
(accrual basis of accounting)

Fiscal Year	Primary Property Tax*	Sales Tax	Franchise & Business Licenses	Total
2007	\$ 5,139,517	\$ 45,707,048	\$ 3,602,776	\$ 54,449,341
2008	5,759,123	39,336,323	3,907,778	49,003,224
2009	6,349,918	33,241,899	4,073,771	43,665,588
2010	6,831,553	29,144,497	4,309,896	40,285,946
2011	7,018,180	29,826,572	4,448,614	41,293,366
2012	6,112,789	33,266,049	4,547,621	43,926,459
2013	9,274,735	37,836,088	4,732,649	51,843,472
2014	9,401,277	39,685,844	5,159,956	54,247,077
2015	9,713,903	42,111,177	5,249,320	57,074,400
2016	9,962,925	46,807,817	5,062,719	61,833,461

Source: The source of this information is the City's financial records.

* Excludes tax assessments for Communities Facilities Districts, improvement districts, and secondary taxes for specific debt.

City of Surprise, Arizona
Major Sources of Municipal Sales Tax
Last Ten Fiscal Years

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
<u>Description of Payers Business</u>										
Construction	\$ 22,273,119	\$ 19,944,596	\$ 10,173,434	\$ 4,391,089	\$ 3,870,561	\$ 4,936,286	\$ 7,071,711	\$ 5,702,652	\$ 5,318,361	\$ 8,429,076
Retail trade	10,818,523	7,614,991	9,839,563	10,886,710	11,258,630	12,588,859	13,831,839	15,319,378	17,897,576	18,608,256
Communications and utilities	3,817,854	2,319,957	4,278,158	4,706,978	4,558,281	4,813,827	5,053,313	5,230,594	5,379,741	5,609,855
Restaurant and bar	3,399,278	2,329,386	3,509,150	3,704,296	3,910,930	4,254,798	4,877,292	5,262,786	5,600,500	5,933,745
Real estate, rental and leasing	3,392,492	2,863,422	2,576,629	2,618,870	2,824,605	3,160,567	3,610,593	3,872,029	4,077,066	4,246,757
Other	2,873,787	2,747,576	2,559,706	2,833,644	2,858,970	3,278,980	3,488,295	3,439,338	4,188,861	4,109,905
Total	\$ 46,575,053	\$ 37,819,928	\$ 32,936,640	\$ 29,141,587	\$ 29,281,977	\$ 33,033,317	\$ 37,933,043	\$ 38,826,777	\$ 42,462,105	\$ 46,937,594

Source: City of Surprise "Sales, Use, and Bed Tax Report" as of June 30, 2016.

The City records sales tax on the modified accrual basis. Therefore, there is a difference between the amounts on this schedule and sales tax reported on the previous page.

Beginning in January 2004, the Arizona Department of Revenue began using a new reporting software system for classifying business establishments call the North American Industry Classification System (NAICS). Under the new system, the category may be defined a little differently. In addition, more categories were established.

When NAICS reporting began, many businesses checked the "Other" category due to uncertainty. This problem is being remedied and therefore, the "Other" category will decrease as more businesses will be classified under their proper category.

State and local laws prohibit the disclosure of individual taxpayer information.

City of Surprise, Arizona
Assessed and Estimated Actual Value of Taxable Property
Last Ten Fiscal Years

Fiscal Year		Real Property		Exemptions	Total		Ratio of Total
		Assessed Value Residential Property	Assessed Value Commercial Property	Real Property	Full Cash Value	Direct Tax Rate	Assessed Value to Total Estimated Actual Value
2007	P	\$ 533,628,022	\$ 196,628,121	\$ (34,364,470)	\$ 695,891,673	0.7229	\$ 6,337,990,423 10.98%
2007	S	539,743,346	256,601,719	(51,815,780)	744,529,285	0.1872	6,750,201,089 11.03%
2008	P	694,136,036	234,267,304	(41,376,119)	887,027,221	0.6593	8,136,769,543 10.90%
2008	S	941,574,261	314,493,838	(61,825,516)	1,194,242,583	0.1007	11,075,464,347 10.78%
2009	P	819,125,453	326,443,400	(68,872,401)	1,076,696,452	0.5939	9,935,245,974 10.84%
2009	S	1,079,864,541	510,525,409	(133,155,590)	1,457,234,360	0.0195	13,645,111,961 10.68%
2010	P	899,879,844	407,255,079	(147,231,863)	1,159,903,060	0.5661	11,218,267,227 10.34%
2010	S	932,885,757	567,640,639	(95,418,806)	1,405,107,590	-	12,479,985,619 10.84%
2011	P	734,802,358	444,395,674	(110,470,743)	1,068,727,289	0.6735	9,795,021,688 10.91%
2011	S	739,725,180	532,775,146	(143,459,254)	1,129,041,072	-	10,353,625,385 10.90%
2012	P	653,425,523	390,774,648	(112,327,444)	931,872,727	0.6700	8,729,697,453 10.67%
2012	S	653,862,821	414,853,720	(131,986,535)	936,730,006	-	8,883,000,424 10.55%
2013	P	613,827,446	355,335,651	(117,175,984)	851,987,113	0.7383	8,131,671,314 10.48%
2013	S	614,117,003	369,093,201	(128,526,531)	854,683,673	-	8,219,696,417 10.40%
2014	P	590,891,318	352,740,031	(120,457,469)	823,173,880	0.7783	7,921,310,783 10.39%
2014	S	592,539,973	366,349,440	(128,753,963)	830,135,450	-	8,021,860,448 10.35%
2015	P	635,011,041	351,426,277	(128,356,166)	858,081,152	0.7591	8,378,359,740 10.24%
2015	S	674,517,543	367,445,212	(137,241,712)	904,721,043	-	8,871,516,138 10.20%
2016	P	659,032,840	359,978,533	(129,767,780)	889,243,593	0.7591	8,723,777,883 10.19%
2016	S	775,338,584	403,053,294	(146,482,133)	1,031,909,745	-	10,151,951,511 10.16%

Source: Maricopa County Assessor's Office State Abstract

Direct Tax Rate is From the Maricopa County Finance Department's "Tax Levy Book for the City of Surprise" for the applicable tax year.

City of Surprise, Arizona
Property Tax Rates
Direct and Overlapping Governments
Last Ten Fiscal Years

Overlapping Rates												
City of Surprise				Maricopa County			Dysart School District					
Fiscal Year	Operating Tax Rate	Debt Service Tax Rate	Total City Tax Rate	Operating Tax Rate	Debt Service Tax Rate	County Library	Total County Tax Rate	Operating Tax Rate	Debt Service Tax Rate	Total School District Tax Rate	Other	Total Direct & Overlapping Rates
2007	0.7229	0.1872	0.9101	1.1794	-	0.0507	1.2301	5.1144	1.8378	6.9522	1.5145	10.6069
2008	0.6593	0.1007	0.7600	1.1046	-	0.0391	1.1437	4.4326	1.6402	6.0728	1.3281	9.3046
2009	0.5939	0.0195	0.6134	1.0327	-	0.0353	1.0680	4.0525	1.5226	5.5751	1.2662	8.5227
2010	0.5661	-	0.5661	0.9909	-	0.0353	1.0262	3.0430	1.7251	4.7681	1.2182	7.5786
2011	0.6735	-	0.6735	1.0508	-	0.0412	1.0920	2.9051	2.0919	4.9970	1.3405	8.1030
2012	0.6700	-	0.6700	1.2407	-	0.0492	1.2899	3.4104	2.5820	5.9924	1.6440	9.5963
2013	0.7383	-	0.7383	1.2407	-	0.0492	1.2899	4.6547	2.7317	7.3864	1.8351	11.2497
2014	0.7783	-	0.7783	1.2807	-	0.0492	1.3299	4.3492	2.9538	7.3030	1.6356	11.0468
2015	0.7591	-	0.7591	1.3209	-	0.0556	1.3765	3.9957	2.7750	6.7707	1.7472	10.6535
2016	0.7591	-	0.7591	1.4009	-	0.0556	1.4565	3.0640	2.9085	5.9725	1.7120	9.9001

Source: Maricopa County Finance Department's "Maricopa County 2016 Tax Levy" report.

City of Surprise, Arizona
Principal Property Taxpayers
June 30, 2016 and 2007

Taxpayer	2016			2007		
	Primary Assessed Valuation	Rank	Percentage of Total	Primary Assessed Valuation	Rank	Percentage of Total
Arizona Public Service Company	\$ 22,299,212	1	2.40%			
Southwest Gas Corporation (T&D)	5,510,783	2	0.59%			
Arizona Public Service Company (CWIP)	3,995,534	3	0.43%			
Epcor - Agua Fria Water Division	3,721,769	4	0.40%			
CCD Real Estate Holdings LLC	3,159,970	5	0.34%			
Surprise Industrial NCP LLC	2,739,288	6	0.29%			
Wal-Mart Stores Inc	2,626,731	7	0.28%			
MCI Communications Services Inc	2,547,137	8	0.27%			
G&I VII Stadium Village LLC	2,477,373	9	0.27%			
Harmony at Surprise LLC	2,312,146	10	0.25%			
Arizona Public Service Company				\$ 16,646,023	1	1.88%
Southwest Gas Corporation (T&D)				4,924,915	2	0.56%
Surprise Center Development LLC				4,469,902	3	0.50%
CHI Construction Company				3,678,656	4	0.41%
Courtland Homes Inc				3,213,770	5	0.36%
AWC: Agua Fria Water Division				3,044,494	6	0.34%
DTR8 LLC				2,923,258	7	0.33%
Surprise Towne Center Holdings LLC				2,891,031	8	0.33%
Surprise Marketplace Holdings LLC				2,674,571	9	0.30%
Sun City Grand Community Association Inc				2,480,914	10	0.28%
Total	<u>\$ 51,389,943</u>		5.52%	<u>\$ 46,947,534</u>		5.29%
Primary Assessed Valuation	928,896,805			887,027,221		

Sources: Maricopa County Assessor's Office
Arizona Department of Revenue

City of Surprise, Arizona
Primary Property Tax Levies and Collections
Last Ten Fiscal Years

Fiscal Year	Total Tax Levy	Collected within the Fiscal Year of the Levy		Tax Collections in Subsequent Years	Total Collections to Date	
		Current Tax Collections	Percentage of Levy		Tax Collections	Percentage of Levy
2007	\$ 5,044,070	\$ 4,830,192	95.8%	\$ 145,244	\$ 4,975,436	98.6%
2008	5,899,686	5,745,663	97.4%	103,259	5,848,922	99.1%
2009	6,381,730	6,166,879	96.6%	184,680	6,351,560	99.5%
2010	6,952,011	6,599,191	94.9%	136,308	6,735,499	96.9%
2011	7,174,003	6,892,250	96.1%	178,508	7,070,758	98.6%
2012	6,200,706	6,021,059	97.1%	125,053	6,146,112	99.1%
2013	6,295,546	6,159,818	97.8%	103,679	6,263,496	99.5%
2014	6,350,356	6,249,156	98.4%	69,734	6,318,890	99.5%
2015	6,498,000	6,425,856	98.9%	38,453	6,464,309	99.5%
2016	6,727,511	6,661,068	99.0%	32,698	6,693,766	99.5%

Source: Maricopa County Treasurer's Office "Secured Levy Report" through June 30, 2016.

City of Surprise, Arizona
Ratios of Outstanding Debt by Type
Last Ten Fiscal Years

Fiscal Year	Governmental Activities				Business-Type Activities				Total Primary Government	Percentage of Personal Income	Per Capita
	General Obligation Bonds	General (CFD) Obligation Bonds	Municipal Property Corp. Bonds	Pledged Revenue Obligations	Water						
					Municipal Property Corp. Bonds	Infrastructure Financing Authority Loan	Pledged Revenue Obligations				
2007	\$ 1,883,912	\$ 1,365,000	\$ 99,730,000	\$ -	\$ -	\$ -	\$ -	\$ 102,978,912	4.1%	1,068	
2008	413,270	5,275,000	97,195,000	-	-	-	-	102,883,270	N/A	1,048	
2009	-	8,495,000	94,560,000	-	-	-	-	103,055,000	3.9%	948	
2010*	-	8,290,000	28,677,713	-	63,112,287	1,500,000	-	101,580,000	4.3%	864	
2011	-	7,935,000	24,489,225	-	61,295,775	1,324,760	-	95,044,760	4.0%	809	
2012	-	7,745,000	22,229,325	-	60,315,675	-	-	90,290,000	3.2%	756	
2013	-	7,545,000	19,896,188	-	59,303,813	-	-	86,745,001	3.0%	715	
2014	-	7,335,000	17,444,474	-	53,565,524	-	-	78,344,998	2.8%	634	
2015	-	7,115,000	-	30,832,800	39,365,000	-	5,832,200	83,145,000	2.7%	658	
2016	-	6,885,000	-	31,770,034	37,585,000	-	5,903,844	82,143,878	3.0%	640	

* The amount for fiscal year 2010 is for sewer related municipal property corporation bonds. Beginning in fiscal year 2010, the municipal property corporation bonds were properly recorded in the sewer fund as a business-type activity instead of as a governmental activity as previously reported.

City of Surprise, Arizona
Ratios of General Bonded Debt Outstanding
Last Ten Fiscal Years

Fiscal Year	General Obligation Bonds	Less: Amounts Available in Debt Service Fund	Total	Percentage of Estimated Actual Taxable Value of Property	Per Capita
2007	\$ 1,883,912	\$ 511,309	\$ 1,372,603	0.020%	13
2008	413,270	170,095	243,175	0.002%	2
2009	-	-	-	0.000%	-
2010	-	-	-	0.000%	-
2011	-	-	-	0.000%	-
2012	-	-	-	0.000%	-
2013	-	-	-	0.000%	-
2014	-	-	-	0.000%	-
2015	-	-	-	0.000%	-
2016	-	-	-	0.000%	-

City of Surprise, Arizona
Direct and Overlapping Governmental Activities Debt
As of June 30, 2016
(accrual basis of accounting)

	<u>Debt Outstanding</u>	<u>Estimated Percentage Applicable</u>	<u>Estimated Share of Overlapping Debt</u>
<u>Governmental Unit:</u>			
Debt repaid with property taxes :			
Maricopa County Community College District	\$ 534,225,000	2.57%	\$ 13,729,583
Maricopa County Special Health Care District	73,000,000	2.57%	1,876,100
Western Maricopa Education Center	71,220,000	6.95%	4,949,790
Dysart Unified School District No. 89	151,488,000	77.50%	117,403,200
Peoria Unified School District No. 11	236,250,000	0.38%	897,750
Nadaburg Unified School District No. 81	700,000	24.38%	170,660
Wickenburg Unified School District No. 9	2,803,000	1.88%	52,696
Marley Park Community Facilities District	7,320,000	100.00%	7,320,000
Subtotal, Overlapping Debt			<u>146,399,779</u>
City of Surprise, direct debt	71,545,000	100.00%	<u>71,545,000</u>
Total Direct and Overlapping General Obligations Bonded Debt			<u><u>\$ 217,944,779</u></u>

Sources: Assessed value used to estimate applicable percentages provided by Maricopa County.

Debt data provided by the Arizona Department of Revenue - Arizona Report of Bonded Indebtedness.

Proportion applicable to City of Surprise, Arizona is computed on the ratio of limited property valuation for fiscal year 2015/2016. Excludes various other non-property tax supported debt such as Public Finance Corporation lease revenue bonds, Stadium District revenue bonds, Stadium District loans, Housing Authority loans and capital leases.

Excludes non-property tax supported debt such as revenue bonds.

Marley Park refunded \$6,065,000 of existing debt with \$11,365,000 of General Obligation bonds on 10/6/2016.

Includes: Excise Tax Revenue obligations and Wastewater Revenue bonds. The City defeased Wastewater Revenue Bonds in the amount of \$1,865,000 on 10/1/2016.

City of Surprise, Arizona
Legal Debt Margin Information Unrestricted and Restricted
Last Ten Fiscal Years

Unrestricted

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Debt limit 6%	\$ 44,671,757	\$ 71,654,555	\$ 87,434,062	\$ 81,197,672	\$ 67,742,464	\$ 56,203,800	\$ 51,281,020	\$ 49,298,862	\$ 54,283,263	\$ 61,914,585
Total net debt applicable to limit	-	-	-	-	-	-	-	-	-	-
Unrestricted legal debt margin	\$ 44,671,757	\$ 71,654,555	\$ 87,434,062	\$ 81,197,672	\$ 67,742,464	\$ 56,203,800	\$ 51,281,020	\$ 49,298,862	\$ 54,283,263	\$ 61,914,585
Total net debt applicable to the limit as a percentage of debt limit	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Restricted

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Debt limit 20%	\$ 148,905,857	\$ 238,848,517	\$ 291,446,872	\$ 270,658,907	\$ 225,808,214	\$ 187,346,001	\$ 170,936,735	\$ 164,329,540	\$ 180,944,209	\$ 206,381,949
Total net debt applicable to limit	2,698,490	1,372,603	243,175	-	-	-	-	-	-	-
Restricted legal debt margin	\$ 146,207,367	\$ 237,475,914	\$ 291,203,697	\$ 270,658,907	\$ 225,808,214	\$ 187,346,001	\$ 170,936,735	\$ 164,329,540	\$ 180,944,209	\$ 206,381,949
Total net debt applicable to the 20% limit as a percentage of the 20% debt limit	1.81%	0.57%	0.08%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Source: Maricopa County Assessor's Office - 2015 Levy Limit Worksheet

City of Surprise, Arizona
Demographic and Economic Statistics
Last Ten Fiscal Years

Year	Population	Personal Income	Median Household Income	Median Age	Unemployment Rate
2007	98,140	\$ 2,500,467,000	\$ 64,206	35.7	4.8%
2008	104,895	N/A	N/A	N/A	6.0%
2009	108,761	2,643,237,573	61,244	40.2	8.3%
2010	117,517	2,367,906,098	61,208	35.4	9.4%
2011	117,517	2,471,437,008	57,114	36.8	6.5%
2012	119,489	2,841,770,071	62,141	35.9	4.3%
2013	121,287	2,870,616,474	60,687	36.8	5.0%
2014	123,546	2,836,842,846	59,973	36.0	6.9%
2015	126,275	3,073,914,630	58,455	37.0	5.9%
2016	128,422	2,779,842,369	59,094	38.7	9.4%

Data Sources:

Arizona Department of Commerce

US Census Bureau

N/A: Information was not available.

City of Surprise, Arizona
Principal Employers
June 30, 2016 and Nine Years Prior

Employer	2016			2007		
	Employees	Rank	%of Total	Employees	Rank	%of Total
Dysart School District (Surprise Schools Only)	1,800	1	11.07%	1,056	1	11.06%
City of Surprise	1,020	2	6.27%	875	3	9.17%
Wal-Mart	770	3	4.74%	725	2	7.59%
Fry's Food Store	500	4	3.08%			
McDonalds	270	5	1.66%			
Maricopa County	210	6	1.29%			
Sun City Grand Community Association	200	7	1.23%			
Home Depot	190	8	1.17%	160	6	1.68%
Kohl's Department Store	170	9	1.05%			
Sam's Club	160	10	0.98%			
Del Webb/Pulte				360	4	3.77%
Surprise Charter Schools (3)				280	5	2.93%
APS				175	7	1.83%
Target				160	9	1.68%
Lowe's				150	10	1.57%

Source: City of Surprise Economic Development Division & Maricopa Association of Governments.

City of Surprise, Arizona
Full-time Equivalent City Government Employees by Function
Last Ten Fiscal Years

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
<u>Function</u>										
General government	124	139	140	124	124	123	123	123	136	142
Public safety:										
Police:										
Officers	128	150	134	132	130	132	133	134	130	139
Civilians	15	20	53	56	58	49	49	48	54	49
Fire:										
Firefighters and officers	129	156	110	110	114	112	112	111	113	113
Civilians	9	10	15	9	8	6	6	7	7	8
Public works and streets:										
All others	89	105	113	100	96	82	83	83	83	84
Community development	51	48	43	40	36	36	40	40	43	40
Culture and recreation	112	124	117	95	97	97	110	110	122	118
Human Services and Commun	-	-	-	-	-	-	-	-	-	9
Water	8	8	31	31	33	29	25	25	24	29
Sanitation	29	29	32	32	34	34	31	31	32	33
Sewer	30	34	39	39	39	36	36	36	37	39
Replenishment	3	5	-	-	-	-	-	-	-	-
Total	727	828	827	768	769	736	748	748	781	803

Source: Fiscal year 2016 Adopted Budget

City of Surprise, Arizona
Operating Indicators by Function
Last Ten Fiscal Years

Function	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Public safety:										
Police:										
Calls- incidents responded to	38,283	40,344	43,002	41,495	40,779	42,010	39,866	37,566	38,191	39,511
Citations issued	8,347	11,732	13,728	12,455	8,233	7,856	9,673	7,020	7,524	5,971
Auto theft rates per capita										
Crimes per capita										
Officers per 1,000 residents	1.2	1.2	1.2	1.2	1.5	1.1	1.1	1.1	1.1	1.0
Fire:										
Number of responses	9,120	10,281	10,523	10,998	11,620	12,313	13,649	14,004	15,750	16,896
Inspections	2,164	2,285	2,114	639	1,101	1,122	1,184	1,411	1,885	2,745
Public works and streets:										
Sq. ft. of buildings to maintain	378,900	535,717	567,245	830,271	830,431	830,431	830,271	830,271	830,271	855,774
Vehicles/equipment maintained per month	394	418	484	444	387	494	403	392	405	334
Number of street lights repaired	148	124	212	249	270	291	300	377	43	44
Street miles maintained	592	592	592	526	536	539	607	607	627	627
Community development:										
Building safety inspections performed	38,000	30,311	17,749	11,349	11,106	13,257	20,150	18,220	15,624	20,320
Annual new residential starts	1,759	774	373	291	206	395	554	385	417	486
Culture and recreation:										
Organized recreation program participants	27,760	132,795	186,139	170,336	176,569	185,232	191,648	192,300	178,186	160,535
Special events/open facility participants	157,800	249,599	259,731	242,759	261,327	256,674	269,823	278,980	321,214	307,475
Water:										
Water service connections	13,985	14,375	14,472	14,519	14,130	14,329	14,570	14,740	14,971	15,116
Sewer:										
Sewage treated (million gallons per day)	7.0	7.0	6.0	7.6	7.4	7.6	8.1	8.1	8.4	8.4
Sewer service connections	42,284	42,912	45,032	46,448	44,077	44,583	45,802	45,984	44,923	54,356
Sanitation:										
Refuse collected (tons/annually)	30,700	31,506	29,757	30,398	30,803	30,289	29,400	30,583	33,351	32,787
Number of routes	31	25	26	34	34	33	33	32	32	56
Total services	30,800	32,096	32,719	33,797	37,144	32,357	32,975	33,321	32,683	35,366

Sources: Various government departments

City of Surprise, Arizona
Capital Asset Statistics by Function
Last Ten Fiscal Years

Function	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Public safety:										
Police:										
Stations	2	2	2	2	2	2	2	2	2	2
Patrol units	66	68	81	73	80	64	63	63	68	72
Fire:										
Fire stations	4	6	7	7	7	7	7	7	7	7
Fire engines and ladder trucks	7	9	10	11	11	11	11	12	12	12
Ambulances	-	-	-	-	-	-	0	0	0	1
Public works and streets:										
Street miles	593	593	592	592	536	539	607	607	627	627
Street lighting improvement districts	71	79	79	83	98	103	101	105	107	107
Traffic Signals	27	34	41	42	42	45	51	51	50	50
Bridges	1	9	12	15	15	19	19	19	19	19
Community development:										
Inspection vehicles	23	14	12	12	12	12	12	10	10	10
Culture and recreation:										
Parks acreage	284	367	383	393	393	393	393	393	393	393
Parks	9	12	12	12	12	12	12	12	12	12
Swimming pools	2	2	2	2	2	2	2	2	2	2
Softball fields	3	3	9	11	11	11	11	11	11	11
Baseball fields	17	17	21	21	21	21	21	21	21	21
Libraries	2	2	2	2	2	2	2	2	2	2
Water:										
Well production maximum daily capacity (millions of gallons)	22.0	21.8	20.7	24.6	31.0	31.0	31	31	32	32
Sewer:										
Sewer treatment plants	1	1	1	1	2	2	2	2	2	2
Maximum daily treatment capacity	8.3	8.3	16.3	16.3	18.3	18.3	18.3	18.3	18.3	18.3
Sanitation:										
Collection trucks	22	25	26	26	26	26	26	26	26	27

Sources: Various government departments



www.surpriseaz.gov

FINANCE DEPARTMENT

16000 N. Civic Center Plaza

Surprise, AZ 85374-7470

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INDEPENDENT ACCOUNTANTS' REPORT

The Auditor General of the State of Arizona and
The Honorable Mayor and the City Council
City of Surprise, Arizona

We have examined the accompanying Annual Expenditure Limitation Report of the City of Surprise, Arizona, for the year ended June 30, 2016. This report is the responsibility of the City of Surprise, Arizona's management. Our responsibility is to express an opinion on this report based on our examination.

Our examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and, accordingly, included examining, on a test basis, evidence supporting the amounts and disclosures in the report and performing such other procedures as we consider necessary in the circumstances. We believe that our examination provides a reasonable basis for our opinion.

In our opinion, the Annual Expenditure Limitation Report of the City of Surprise, Arizona, referred to above presents, in all material respects, the information required by the uniform expenditure reporting system on the basis of accounting described in Note 1.

CliftonLarsonAllen LLP

CliftonLarsonAllen LLP

Phoenix, Arizona
December 19, 2016

The Honorable Mayor and City Council
City of Surprise, Arizona
Surprise, Arizona

We have audited the financial statements of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of City of Surprise, Arizona for the year ended June 30, 2016, and have issued our report thereon dated December 19, 2016. We have previously communicated to you information about our responsibilities under auditing standards generally accepted in the United States of America, *Government Auditing Standards*, and Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance), as well as certain information related to the planned scope and timing of our audit. Professional standards also require that we communicate to you the following information related to our audit.

Significant audit findings

Qualitative aspects of accounting practices

Accounting policies

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by City of Surprise, Arizona are described in Note 1 to the financial statements.

For the year ended June 30, 2016, the financial statements include the impact, if any, of Governmental Accounting Standards Board Statement (GASBS) Number 72 – *Fair Value Measurement and Application*, GASBS Number 73 – *Accounting and Financial Reporting for Pensions and Related Assets that are not within the Scope of GASBS Number 68 and Amendments to Certain Provisions of GASBS Numbers 67 and 68*, GASBS Number 76 – *the Hierarchy of Generally Accepted Accounting Principles for State and Local Governments*, GASBS Number 79 – *Certain External Investment Pools and Pool Participants*, and GASBS Number 82 *Pension Issues*.

We noted no transactions entered into by the City during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the financial statements were:

- Management's estimate of the useful lives of capital assets is based on an analysis of historical data. We evaluated the key factors and assumptions used to develop the useful lives of capital assets in determining that it is reasonable in relation to the financial statements taken as a whole.
- Management's estimate of the current portion of compensated absences is based on the average activity over the prior five years. We evaluated the key factors and assumptions used to develop the estimate of compensated absences in determining that they are reasonable in relation to the financial statements taken as a whole.
- Management's estimate of the allowance for doubtful accounts related to the City's receivables is based on historical revenues, historical loss levels, and an analysis of the collectability of individual accounts. We evaluated the key factors and assumptions used to develop the allowance in determining that it is reasonable in relation to the financial statements taken as a whole.
- Management's estimate of the claims payable is based on an actuarial analysis performed by the City's consultant, The Segal Group. We evaluated the key factors and assumptions used to develop the estimate of claims payable in determining that they are reasonable in relation to the financial statements taken as a whole.
- Management's estimate of the unfunded pension liability, inflows and outflows related to the Arizona State Retirement System, Elected Officials pension plans and Public Safety Personnel Retirement System Plan benefits are based on actuarial reports prepared by other professionals. We reviewed the key assumptions used to estimate the liability in determining that they are reasonable in relation to the financial statements taken as a whole.
- Management's estimate of the other post employment benefits related to the Public Safety Personnel Retirement System Plan benefits are based on actuarial reports prepared by other professionals. We reviewed the key assumptions used to estimate the benefits in determining that they are reasonable in relation to the financial statements taken as a whole.
- Management's estimate of the investments at fair value is based on published market values at June 30, 2016. We reviewed the key assumptions used to estimate the fair market value in determining that they are reasonable in relation to the financial statements taken as a whole.

Financial statement disclosures

Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users. There were no particularly sensitive financial statement disclosures.

The financial statement disclosures are neutral, consistent, and clear.

Difficulties encountered in performing the audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.

Uncorrected misstatements

Professional standards require us to accumulate all misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. The attached schedule summarizes uncorrected misstatements of the financial statements. Management has determined that their effects are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

Corrected misstatements

None of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole.

Disagreements with management

For purposes of this letter, a disagreement with management is a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditors' report. No such disagreements arose during our audit.

Management representations

We have requested certain representations from management that are included in the management representation letter dated December 19, 2016.

Management consultations with other independent accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the City's financial statements or a determination of the type of auditors' opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Significant issues discussed with management prior to engagement

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to engagement as the City's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our engagement.

Other information in documents containing audited financial statements

With respect to the required supplementary information (RSI) accompanying the financial statements, we made certain inquiries of management about the methods of preparing the RSI, including whether the RSI has been measured and presented in accordance with prescribed guidelines, whether the methods of measurement and preparation have been changed from the prior period and the reasons for any such changes, and whether there were any significant assumptions or interpretations underlying the measurement or presentation of the RSI. We compared the RSI for consistency with management's responses to the foregoing inquiries, the basic financial statements, and other knowledge obtained during the audit of the basic financial statements. Because these limited procedures do not provide sufficient evidence, we did not express an opinion or provide any assurance on the RSI.

With respect to the schedule of expenditures of federal awards (SEFA) accompanying the financial statements, on which we were engaged to report in relation to the financial statements as a whole, we made certain inquiries of management and evaluated the form, content, and methods of preparing the SEFA to determine that the SEFA complies with the requirements of the Uniform Guidance, the method of preparing it has not changed from the prior period or the reasons for such changes, and the SEFA is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the SEFA to the underlying accounting records used to prepare the financial statements or to the financial statements themselves. We have issued our report thereon dated December 19, 2016.

With respect to the combining statements and schedules (collectively, the supplementary information) accompanying the financial statements, on which we were engaged to report in relation to the financial statements as a whole, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior period or the reasons for such changes, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves. We have issued our report thereon dated December 19, 2016.

The introductory and statistical sections accompanying the financial statements, which are of a nonaccounting nature and which are the responsibility of management, were prepared for purposes of additional analysis and are not a required part of the financial statements. Such information was not subjected to the auditing procedures applied in the audit of the financial statements, and, accordingly, we did not express an opinion or provide any assurance on it.

Our auditors' opinion, the audited financial statements, and the notes to financial statements should only be used in their entirety. Inclusion of the audited financial statements in a document you prepare, such as an annual report, should be done only with our prior approval and review of the document.

* * *

This communication is intended solely for the information and use of the City Council and management of the City of Surprise, Arizona and is not intended to be, and should not be, used by anyone other than these specified parties.

A handwritten signature in black ink that reads "CliftonLarsonAllen LLP". The signature is written in a cursive, flowing style.

CliftonLarsonAllen LLP

Phoenix, Arizona
December 19, 2016

Summary of Uncorrected Misstatements
City of Surprise, Arizona
June 30, 2016

<u>Account</u>	<u>Description</u>	<u>Debit</u>	<u>Credit</u>
Opinion Unit:	General Fund		
To properly state beginning fund balance and rental revenue.			
21111-444-421-2999-2999-31911-999-99-29999	Rent Revenue	\$ 73,207	
21111-999-999-2999-2999-23141-999-99-29999	Beginning Fund Balance		\$ 73,207
Total		<u>\$ 73,207</u>	<u>\$ 73,207</u>

INDEPENDENT ACCOUNTANTS' REPORT

The Honorable Mayor and the City Council
City of Surprise, Arizona
Surprise, Arizona

We have examined the City of Surprise, Arizona's (City) compliance as to whether highway user revenue fund monies received by the City pursuant to Arizona Revised Statutes title 28, chapter 18, article 2 and any other dedicated state transportation revenues received by the City are being used solely for the authorized transportation purposes during the fiscal year ended June 30, 2016. Management is responsible for the City of Surprise, Arizona's compliance with those requirements. Our responsibility is to express an opinion on the City of Surprise, Arizona's compliance based on our examination.

Our examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and, accordingly, included examining, on a test basis, evidence about the City of Surprise, Arizona's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances. We believe that our examination provides a reasonable basis for our opinion. Our examination does not provide a legal determination on the City of Surprise, Arizona's compliance with specified requirements.

Our procedures disclosed a finding of noncompliance with the Arizona Revised Statutes title 28, chapter 18, article 2 as listed in the following schedule as item 2016-1.

In our opinion, with the exception of item 2016-1, the City of Surprise, Arizona complied, in all material respects, with the aforementioned requirements for the fiscal year ended June 30, 2016.

CliftonLarsonAllen LLP

Phoenix, Arizona
December 19, 2016

2016-1 Highway User Revenue Fund Disbursements

Two of twenty-five HURF disbursements tested, totaling \$126.84, were not allowable in accordance with Arizona Revised Statutes Title 28, Chapter 18, Article 2. The disbursements were made to purchase meals.

We recommend the City review the disbursements charged to the Highway User Revenue Fund to ensure they are allowable under Arizona Revised Statutes Title 28, Chapter 18, Article 2.

Management
City of Surprise, Arizona
Surprise, Arizona

In planning and performing our audit of the financial statements of the City of Surprise, Arizona as of and for the year ended June 30, 2016, in accordance with auditing standards generally accepted in the United States of America, we considered the City's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the City's internal control. Accordingly, we do not express an opinion on the effectiveness of the City's internal control.

However, during our audit we became aware of deficiencies in internal control other than significant deficiencies and material weaknesses and other matters that are opportunities to strengthen your internal control and improve the efficiency of your operations. Our comments and suggestions regarding those matters are summarized below.

Physical Observation – Capital Assets

During our audit, we noted that the City has started but has not completed a physical verification of City assets. We recommend the City continue this process to ensure assets claimed on the City asset records are in fact in the possession of the City. In addition, we recommend that City departments review established policies and ensure departmental procedures comply.

User Access Audits

User access requirements can change as a result of several factors including transfers, terminations, promotions, reorganization, and department or City growth. Audits of user accounts and their access level are not performed on a regular basis for Active Directory and critical applications. The City is checking for inactive users on the Active Directory but not on the access levels. Not performing a regular, standardized user account audit increases the risk that the City may not identify all old and unused user accounts, users with improper access to the system, and/or unauthorized system users. The City should conduct a formal review of all user accounts and their access level should be performed every year. The review process should be documented, and sign-off should be obtained from IT personnel completing the review. The review should ensure access levels within the applications by comparing the user's current access rights listed on the system to those listed on their access form, and by confirming the user's access rights with their departmental manager.

We will review the status of these comments during our next audit engagement. We have already discussed many of these comments and suggestions with various City personnel, and we will be pleased to discuss them in further detail at your convenience, to perform any additional study of these matters, or to assist you in implementing the recommendations.

Management
City of Surprise, Arizona
Page 2

This communication is intended solely for the information and use of management and others within the City, and is not intended to be, and should not be, used by anyone other than these specified parties.

CliftonLarsonAllen LLP

CliftonLarsonAllen LLP

Phoenix, Arizona
December 19, 2016

CITY OF SURPRISE, ARIZONA
SINGLE AUDIT ACT REPORTS
YEAR ENDED JUNE 30, 2016

**CITY OF SURPRISE, ARIZONA
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**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING
AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF BASIC FINANCIAL
STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

Honorable Mayor and Members of the City Council
City of Surprise, Arizona
Surprise, Arizona

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the City of Surprise, Arizona, as of and for the year ended June 30, 2016, and the related notes to the financial statements, which collectively comprise the City of Surprise, Arizona's basic financial statements, and have issued our report thereon dated December 19, 2016.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the City of Surprise, Arizona's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the City of Surprise, Arizona's internal control. Accordingly, we do not express an opinion on the effectiveness of the City of Surprise, Arizona's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Honorable Mayor and Members of the City Council
City of Surprise, Arizona

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the City of Surprise, Arizona's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the result of that testing, and not to provide an opinion on the effectiveness of the City of Surprise, Arizona's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the City of Surprise, Arizona's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in black ink that reads "CliftonLarsonAllen LLP". The signature is written in a cursive, flowing style.

CliftonLarsonAllen LLP

Phoenix, Arizona
December 19, 2016

**INDEPENDENT AUDITORS' REPORT ON COMPLIANCE FOR EACH MAJOR
FEDERAL PROGRAM, REPORT ON INTERNAL CONTROL OVER COMPLIANCE, AND
REPORT ON THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS AS
REQUIRED BY THE UNIFORM GUIDANCE**

Honorable Mayor and Members of the City Council
City of Surprise, Arizona
Surprise, Arizona

Report on Compliance for Each Major Federal Program

We have audited the City of Surprise, Arizona's compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of the City of Surprise, Arizona's major federal programs for the year ended June 30, 2016. The City of Surprise, Arizona's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of City of Surprise, Arizona's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about City of Surprise, Arizona's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the City of Surprise, Arizona's compliance.

Opinion on Each Major Federal Program

In our opinion, the City of Surprise, Arizona complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2016.

Report on Internal Control Over Compliance

Management of City of Surprise, Arizona is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered City of Surprise, Arizona's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of City of Surprise, Arizona's internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Honorable Mayor and Members of the City Council
City of Surprise, Arizona

Report on Schedule of Expenditures of Federal Awards Required by the Uniform Guidance

We have audited the financial statements of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of City of Surprise, Arizona as of and for the year ended June 30, 2016, and the related notes to the financial statements, which collectively comprise City of Surprise, Arizona's basic financial statements. We issued our report thereon dated December 19, 2016, which contained unmodified opinions on those financial statements. Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the basic financial statements. The accompanying schedule of expenditures of federal awards is presented for purposes of additional analysis as required by the Uniform Guidance and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of federal awards is fairly stated in all material respects in relation to the basic financial statements as a whole.

A handwritten signature in cursive script that reads "CliftonLarsonAllen LLP".

CliftonLarsonAllen LLP

Phoenix, Arizona
December 19, 2016

**CITY OF SURPRISE, ARIZONA
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2016**

SECTION I – SUMMARY OF AUDITORS' RESULTS

Financial Statements

Type of auditor's report issued: *Unmodified*

Internal control over financial reporting:

- Material weakness(es) identified? _____ yes X no
- Significant deficiency(ies) identified? _____ yes X none reported

Noncompliance material to financial statements noted?

_____ yes X no

Federal Awards

Internal control over major programs:

- Material weakness(es) identified? _____ yes X no
- Significant deficiency(ies) identified? _____ yes X none reported

Type of auditor's report issued on compliance for major programs:

Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)?

_____ yes X no

Identification of major programs:

CFDA Numbers

14.218

20.205

Name of Federal Program or Cluster

Community Development Block Grant Cluster

Highway Planning and Construction

Dollar threshold used to distinguish between Type A and Type B programs:

\$750,000

Auditee qualified as low-risk auditee?

_____ yes X no

**CITY OF SURPRISE, ARIZONA
SCHEDULE OF FINDINGS AND QUESTIONED COSTS (CONTINUED)
YEAR ENDED JUNE 30, 2016**

SECTION II – FINANCIAL STATEMENT FINDINGS

None noted

SECTION III – FEDERAL AWARD FINDINGS AND QUESTIONED COSTS

None noted

SECTION IV – SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS

None noted

**CITY OF SURPRISE, ARIZONA
SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2016**

Federal Grantor/Pass-Through Grantor/Program Title	CFDA Number	Pass-Through Grantor's Number	Expenditures	Subrecipient's Share of Total Expenditures
<u>U.S. DEPARTMENT OF DEFENSE</u>				
Arizona Military Energy Land Use Plan	12.610	EN-1567-16-01	\$ 22,248	\$ 22,248
<u>U.S. DEPARTMENT OF HOUSING & URBAN DEVELOPMENT</u>				
Neighborhood Stabilization Program (NSP3)	14.218	Program Income	34,876	-
Community Development Block Grants/Entitlement Grants	14.218	B-12-MC-04-0514	4,478	-
Community Development Block Grants/Entitlement Grants	14.218	B-13-MC-04-0514	246,069	264
Community Development Block Grants/Entitlement Grants	14.218	B-14-MC-04-0514	320,974	9,686
Community Development Block Grants/Entitlement Grants	14.218	B-15-MC-04-0514	391,920	41,406
Total Community Development Block Grant Cluster			998,317	51,356
Passed Through Maricopa County HOME Consortium				
HOME Investment Partnership Program - 2011	14.239	6048	495	-
HOME Investment Partnership Program - 2012	14.239	3085	10,866	-
HOME Investment Partnership Program - 2013	14.239	C-22-14-039-3-00	25,233	-
HOME Investment Partnership Program - 2015	14.239	3230	123,013	-
Total HOME Investment Partnership Program			159,607	-
Total U.S. Department of Housing and Urban Development			1,157,924	51,356
<u>U.S. DEPARTMENT OF JUSTICE</u>				
Passed Through Arizona Department of Public Safety				
Office of Victims of Crime/Crime Victim Assistance	16.575	2014-259	63,312	-
Office of Victims of Crime/Crime Victim Assistance	16.575	2015-218	47,977	-
Total Office of Victims of Crime/Crime Victim Assistance			111,289	-
Passed Through Maricopa County, Arizona				
Edward Byrne Memorial Justice Assistance Grant (JAG) Programs	16.738	2014-DJ-BX-1197	5,756	-
Passed Through Maricopa County, Arizona				
Drug Enforcement Agency/Task Force	16.unkn	SW-AZ-1761H	463	-
Drug Enforcement Agency/Task Force	16.unkn	D-17-PX-0073/0074	33,491	-
Total Drug Enforcement Agency/Task Force			33,954	-
Total U.S. Department of Justice			150,999	-
<u>U.S. DEPARTMENT OF TRANSPORTATION</u>				
Passed Through Arizona Department of Transportation				
Highway Planning and Construction	20.205	SUR-0(220)T	65,932	-
Passed Through Maricopa Association of Governments				
Highway Planning and Construction	20.205	021648936	775,311	-
Total Highway Planning and Construction Grant			841,243	-
Passed Through Governor's Office of Community and Highway Safety				
DUI Enforcement	20.600	2016-AL-044	17,264	-
DUI Enforcement/Alcohol Enforcement Overtime	20.600	2015-AL-017	7,412	-
Accident Investigation Education/Training - IPTM	20.600	2015-AI-010	1,190	-
Emergency Medical Services	20.600	2015-EM-014	11,141	-
Accident Investigation Enforcement Related Equipment	20.600	2016-AI-004	14,000	-
Click It or Ticket	20.600	2016-CIOT-015	4,000	-
Total Highway Safety Cluster			55,007	-
Total U.S. Department of Transportation			896,250	-

See accompanying notes to schedules of expenditures of federal awards.

CITY OF SURPRISE, ARIZONA
SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS (CONTINUED)
YEAR ENDED JUNE 30, 2016

Federal Grantor/Pass-Through Grantor/Program Title	CFDA Number	Pass-Through Grantor's Number	Expenditures	Subrecipient's Share of Total Expenditures
<u>U.S. DEPARTMENT OF HUMAN SERVICES</u>				
Passed through the Area Agency on Aging, Region One				
Special Programs for the Aging - Title III, Part C - Nutritional Services	93.045	2016-36-SUR	\$ 39,415	\$ -
Passed Through Maricopa County Human Services				
Community Action Program Services	93.667	C-22-13-070-3-02	83,014	-
Total Department of Health and Human Services			122,429	-
<u>U.S. DEPARTMENT OF HOMELAND SECURITY/FEMA</u>				
Passed through the Arizona Department of Emergency and Military Affairs				
Disaster Assistance	97.036	4203-DR-AZ-013-71510-00	280,137	-
Passed through the Arizona Department of Homeland Security				
Homeland Security Grant Program	97.067	140810-02	15,332	-
Homeland Security Grant Program	97.067	140825-01	36,972	-
Homeland Security Grant Program	97.067	140825-02	15,000	-
Homeland Security Grant Program	97.067	150821-01	49,508	-
Homeland Security Grant Program	97.067	150822-01	24,265	-
Total U.S. Department of Homeland Security			421,214	-
TOTAL EXPENDITURES OF FEDERAL AWARDS			<u>\$ 2,771,064</u>	<u>\$ 73,604</u>
			-	

See accompanying notes to schedules of expenditures of federal awards.

CITY OF SURPRISE, ARIZONA
NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2016

NOTE 1 BASIS OF PRESENTATION

The accompanying schedule of expenditures of federal awards (the "Schedule") includes the federal award activity of the City of Surprise, Arizona under programs of the federal government for the year ended June 30, 2016. The information in this Schedule is presented in accordance with the requirements of 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)*. Because the Schedule presents only a selected portion of the operations of Example Entity, it is not intended to and does not present the financial position, changes in net position, or cash flows of the City of Surprise, Arizona.

NOTE 2 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Expenditures reported on the Schedule are reported on the modified accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement. Negative amounts shown on the Schedule represent adjustments or credits made in the normal course of business to amounts reported as expenditures in prior years. City of Surprise, Arizona has not elected to use the 10-percent de minimis indirect cost rate as allowed under the Uniform Guidance.



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

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Council Meeting Date:	January 17, 2017	Contact Person:	Robert Wingo, City Attorney
Submitting Department:		District:	Internal
Staff Recommendations:	None		

Consent	Regular	Public Hearing	Report/Discussion
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Agenda Wording:

Consideration and action to enter into executive session for discussions and consultation with staff in order to consider the City Council's position and instruct staff regarding negotiations for the purchase of real property in the proximate vicinity of the Original Town Site pursuant to A.R.S. 38-431.03(A)(7).

Motion:

Background:

Objective Analysis:

Policy Compliant:

Financial Impact:

Budget Impact:

FTE Impact:

ATTACHMENTS:

[Click to download](#)

No Attachments Available



CITY OF SURPRISE
Regular City Council Meeting

January 17, 2017 @ 6:00:00 PM

[Back](#) [Print](#)

Council Meeting Date: January 17, 2017

Contact Person: Robert Wingo, City Attorney

Submitting Department:

District: Internal

Staff Recommendations: None

Consent

Regular

Public Hearing

Report/Discussion

Agenda Wording:

Consideration and action to enter into executive session for discussion and consultation with staff in order to consider the City Council's position regarding contract negotiations and the sale or lease of real property in the proximate vicinity of Surprise City Hall and Surprise Stadium pursuant to ARS 38-431.03(A(4) and (7).

Motion:

I move to approve entering into executive session for discussion and consultation with staff in order to consider the City Council's position regarding contract negotiations and the sale or lease of real property in the proximate vicinity of Surprise City Hall and Surprise Stadium pursuant to ARS 38-431.03(A(4) and (7).

Background:

Objective Analysis:

Policy Compliant:

Financial Impact:

Budget Impact:

FTE Impact:

ATTACHMENTS:

Click to download

No Attachments Available
