



CITY OF SURPRISE
Planning and Zoning Commission Agenda
16000 N. Civic Center Plaza
Surprise, AZ 85374

Thursday, March 1, 2018 @ 6:00 PM
 COUNCIL CHAMBERS

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CALL TO ORDER.

- A. Roll Call
- B. Pledge of Allegiance
- C. Current Events and Reports – Pursuant to A.R.S. §38-431.02(k) the chief administrator, presiding officer or a member of a public body may present a brief summary of current events without listing in the agenda the specific matters to be summarized, provided that 1) The summary is listed on the agenda; and 2) The public body does not propose, discuss, deliberate or take legal action at that meeting on any matter in the summary unless the specific matter is properly noticed for legal action.
- D. Staff Reports

Planning and Zoning Commission Agenda:

CALL TO THE PUBLIC:

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

Note: A.R.S. 38-431.01(H) - During this time members of the public may address the Board\Commission only on issues within the jurisdiction of the Board\Commission which are not an item on the agenda. At the conclusion of the open call, the Board\Commission 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.

- E. 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 Board\Commission. There will be no separate discussion on these items unless a board member or commissioner requests, in which event the item will be removed from the consent agenda and considered in its normal sequence on the agenda.

CONSENT AGENDA:

- *#1 District Internal Consideration and action pertaining to approval of the February 15, 2018 Planning and Zoning Commission Minutes.

None
 Lorraine
 Nevarez -
 Community
 Development

REGULAR AGENDA ITEM - PUBLIC HEARING:

			STAFF RECOMMENDATION/
ITEM #	DISTRICT #	ITEM DESCRIPTION	PRESENTED BY
#2	District 3	<u>Consideration and action regarding a Zone change from Residential Ranch (RR) to Medium Density Residential 3.65 Dwelling Units per Acre with a PUD Overlay (RM-6 PUD) and Medium Density Residential 4.47 Dwelling Units per Acre with a PUD Overlay (RM-9 PUD) for Rancho TruGold</u>	Approve Robert Kuhfuss - Community Development
#3	District 3	<u>Consideration and action regarding a Preliminary Plat in the RM-6 PUD and RM-9 PUD zoning districts, for Rancho TruGold, generally located along the Sweetwater Avenue Alignment between Cotton Lane and 175th Avenue</u>	Approve Robert Kuhfuss - Community Development
#4	District Citywide	<u>Consideration and action on an amendment to the Consolidated Plan 2015-19 Priorities.</u>	Approve Seth Dyson, Human Service & Community Vitality
#5	District Citywide	<u>Consideration and action on an amendment to the funding priorities for the Community Development Block Grant Program Third Year Annual Action Plan for Year 2017-2018.</u>	Approve Alicia Rubio, Human Service & Community Vitality
#6	District Internal	<u>Consideration and action on funding recommendations for Public Service Activities for the Community Development Block Grant Program Year 2018-19.</u>	Approve Seth Dyson, Human Service & Community Vitality
#7	District Citywide	<u>Consideration and action on the funding priorities for the Community Development Block Grant Program Fourth Year Annual Action Plan for Year 2018-2019.</u>	Approve Seth Dyson, Human Service & Community Vitality

REGULAR AGENDA ITEM - NON-PUBLIC HEARING:

			STAFF RECOMMENDATION/
ITEM #	DISTRICT #	ITEM DESCRIPTION	PRESENTED BY
#8	District 6	<u>Consideration and action approving a Site Plan for Hardy World, generally located on the southwestern corner of Dysart and Waddell Roads.</u>	Approve Hobart Wingard - Community Development

OTHER BUSINESS:

#9	District Internal	<u>Discussion and direction pertaining to future agenda items.</u>	No Action Eric Fitzer -
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**EXECUTIVE SESSION:
ADJOURNMENT:**

SHERRY ANN AGUILAR, CITY CLERK, CMC

POSTED:

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

- discussion or consideration of records exempt by law from public inspection (A.R.S. §38-401.03 (A)(2)); or
- discussion or consultation for legal advice with the city's attorneys (A.R.S. §38-431.03 (A)(3)).

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 or by agreement of the Commission, or as otherwise ordered by a court of competent jurisdiction.

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

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
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

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Board Meeting Date:	March 1, 2018	Contact Person:	Lorraine Nevarez - Community Development
Submitting Department:	CD Boards and Commissions	District:	Internal
Staff Recommendations:	None		

Consent	x	Regular	Public Hearing	Report/Discussion
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Agenda Wording:

Consideration and action pertaining to approval of the February 15, 2018 Planning and Zoning Commission Minutes.

Motion:

I move to approve the consent agenda as presented.

Background:

Financial Impact Statement:

No Financial Impact

ATTACHMENTS:

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☐ [Minutes 2-15-18](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

**CITY OF SURPRISE
PLANNING AND ZONING COMMISSION**

MEETING MINUTES

February 15, 2018 / 6:00 PM

**COUNCIL CHAMBERS
16000 North Civic Center Plaza
Surprise, AZ 85374**

CALL TO ORDER.

Chair Ken Chapman called the Planning and Zoning Commission Meeting to order at 6:00 p.m. at Surprise City Hall, 16000 North Civic Center Plaza, Surprise, Arizona 85374, on February 15, 2018.

A. ROLL CALL

In attendance were Chair Ken Chapman, Vice Chair Mitchell Rosenbaum, Commissioners Dennis Smith, Dennis Bash, Matthew Keating, Gisele Norberg and Eric Cultum.

STAFF PRESENT:

Community Development Director Eric Fitzer, City Attorney Robert Wingo, Planner Sergio Angulo, Current Planning Supervisor Robert Kuhfuss, Human Services and Community Vitality Director Seth Dyson, Neighborhood Services Coordinator Alicia Rubio and Planning and Zoning Commission Secretary Lorraine Nevarez.

COUNCIL MEMBERS PRESENT:

None.

B. PLEDGE OF ALLEGIANCE

C. CURRENT EVENTS REPORT

None.

D. STAFF REPORT

None.

CALL TO THE PUBLIC:

Chair Chapman opened the call to the public to discuss any items not listed on the agenda.

Hearing no comments, Chair Chapman closed the call to the public.

CONSENT AGENDA:

Item 1 – Internal – Consideration and action approving the February 15, 2018 Planning and Zoning Commission Minutes.

Commissioner Smith made a motion to approve the consent agenda as presented. Vice Chair Rosenbaum seconded the motion. Motion passes with 7 votes in favor.

REGULAR AGENDA ITEMS REQUIRING A PUBLIC HEARING:

Item 2 – District 1 – Consideration and action regarding a Preliminary Plat in the Residential Medium Density (RM-9) PUD zoning district.

Robert Kuhfuss, Planner, presented item 2 to the Commission.

The Commission discussed item 2:

- Fire access

Chair Chapman opened the call to the public.

Hearing no comments, Chair Chapman closed the call to the public.

Commissioner Cultum made a motion to recommend of the requested Preliminary Plat in the Residential Medium Density (RM-9) PUD Zoning district to the Mayor and City Council, subject to stipulations 'a' through 'c' as listed in the Staff Report. Commissioner Keating seconded the motion. Motion passes with 7 votes in favor.

Chair Chapman moved item 4 to follow after item 2.

Item 4 – District 1 – Consideration and action regarding a Preliminary Plat for Marley Park Phase 4 & 5.

Robert Kuhfuss, Planner, presented item 4 to the Commission.

Chair Chapman opened the call to the public.

Jason Harrison, resident, shared his concerns regarding access to the various community parks and the location of the dog park.

Donna Bronski, resident, shared her concerns regarding the community name creating confusion and access to the amenities and uses of the parks.

Lindsey Barker, resident, shared her concerns about the future development of parcel 9 and possibility of additional traffic issues.

Matt Barker, resident, shared his concerns about the future development of parcel 9.

Brian Greathouse, representing Meritage, addressed the questions from the public comments.

Hearing no further comments, Chair Chapman closed the call to the public.

The Commission discussed item 4:

- Parks
- HOA's
- Traffic lights
- View fencing
- Dog park
- Community Name
- Density requirements
- Notification letters from Luke AFB

Commissioner Keating made a motion to add stipulation f to read DMB and Meritage homes will workout an HOA agreement between Mark Park and Homestead at Marley Park that allows the homes on the southside of Meadows Park that utilize the park and will also be held accountable to the enhanced restrictions associated with the backyards on a green space. Commissioner Cultum seconded the motion. Motion fails with 4 votes against (Commissioner Smith, Commissioner Bash, Chair Chapman and Commissioner Norberg) and 3 in favor.

Commissioner Norberg made a motion to recommend approval to the Mayor and City Council 776-Lot Preliminary Plat in the PAD Zoning District (Marley Park) subject to stipulations 'a' through 'e' and stipulation 'c' effective February 15, 2018 as listed in the Staff Report. Commissioner Bash seconded the motion. Motion passes with 7 votes in favor.

REGULAR AGENDA ITEMS NOT REQUIRING A PUBLIC HEARING:

Item 3 – District 1 – Consideration and action on a Site Plan to allow for a new Dollar General Retail store on a portion of Parcel L8-A of the Desert Oasis at Surprise PAD generally located north of Jomax Road and West of 171st Avenue.

Sergio Angulo, Planner, presented item 3 to the Commission.

The Commission discussed item 3:

- Landscape
- Parking spaces
- Signage
- Type of store products sold

Chair Chapman noted public would like to comment on this item.

Bill Whitehurst, resident, shared his concerns regarding the safety of the community with this type of business.

Augustine Prieto, resident, shared his concern regarding the design of the building.

Holly Jones, resident, shared her concerns regarding property values and left in and out on Jomax.

Commissioner Bash made a motion to approve a Site Plan to allow for a new Dollar General Retail store on a portion of Parcel L8-A of the Desert Oasis at Surprise PAD generally located north of Jomax Road and West of 171st Avenue, subject to stipulations 'A' & 'B' as listed in the Staff Report. Commissioner Smith seconded the motion. Motion passes with 7 votes in favor.

Item 5 – Citywide – Presentation and discussion regarding the Public Service Activities for the Community Development Block Grant Program Year 2018-19.

Alicia Rubio, Neighborhood Services Coordinator and Seth Dyson, Human Services and Community Vitality Director gave an overview of the program, process timeline, CDBG goals for public services, the application descriptions and evaluations and the City's funding recommendations.

Public Service Application presentations were given by the following:

- Lisa Notaro - St. Mary's Food Bank
- Ervin Cutwright – Summer Youth Employment Program
- Edith Baltierrez – Surprise Crisis Assistance Fund

- Holly Crow - Sojourner Center
- Joanne Thomson - Benevilla
- Lisa Glow – Central Arizona Shelter Services (CASS)
- Rosalie Hernandez – A New Leaf
- Bill Ford – St. Vincent de Paul
- Deb Richards – Sun Health
- Bonnie Wilson – Northwest Valley Connect
- Madelon Jeffreys – Youngtown Lending Program
- Connie Whitlock – What's Happenin' Arts Movement (WHAM)
- Jaime Duarte - Potter's House
- Connie Phillips - Lutheran Service
- Christopher Nelson - MVP Youth Behavioral Baseball Academy

The Commission discussed item 6:

- Transportation funds used for St. Mary's Foodbank
- Utility funding regarding funding between St. Vincent de Paul and Surprise Crisis Assistance Fund
- Funding regarding Coordinator position for Sojourner Center
- Security services at CASS
- Income qualification process for Sun Health
- Transportation coverage regarding Northwest Valley Connect
- Meeting space for Potter's House
- Lutheran's Service for Homelessness
- MVP and creating or existing partnerships with City of Surprise
- Staff funding recommendations
- Rubric rational for scoring the applicants

Item 6 – District 5 – Discussion and presentation regarding the Surprise Market place and Surprise Town Center monument signage.

Eric Fitzer, Director, presented item 6 to the Commission.

The Commission discussed item 6:

- Commercial needs
- Aesthetics
- ADOT implications regarding signage
- Signage heights
- Other municipalities that compare
- Freeway signage
- Location of signage
- Comprehensive Sign Program process

OTHER BUSINESS:

Item 7 – INTERNAL - Discussion pertaining to future agenda items.

The Commission would like more information regarding Senate Bill 1480.

ADJOURNMENT:

Hearing no further business, Chair Chapman adjourned the Planning and Zoning Commission meeting at 9:25 p.m.

Eric Fitzer
Community Development Director

Ken Chapman
Planning and Zoning Commission Chair

The foregoing instrument is a full, true and correct copy of the original document on file in the office of the City Clerk, City of Surprise, Arizona.

ATTEST BY: _____
Lorraine Nevarez, Commission Secretary

DATE: _____



CITY OF SURPRISE
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

Back Print

Board Meeting Date:	March 1, 2018	Contact Person:	Hobart Wingard - Community Development
Submitting Department:	CD Boards and Commissions	District:	6
Staff Recommendations:	Approve		

Consent	Regular	x	Public Hearing	Report/Discussion
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Agenda Wording:

Consideration and action approving a Site Plan for Hardy World, generally located on the southwestern corner of Dysart and Waddell Roads.

Motion:

Move to approve a Site Plan for Hardy World subject to stipulations 'A.' through 'C.'

Background:

Watson Civil Engineering, on behalf of Hardy World LLC, seeks approval of a Site Plan Amendment to allow a multi-building speculative project in the Surprise Pointe Commercial and Industrial Development. Two (2) buildings will be constructed on the currently vacant parcel. Site improvements will include the buildings, parking, landscaping, sidewalk paving, signage, etc.

Financial Impact Statement:

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

ATTACHMENTS:

Click to download

- ☐ [00 - FS17-585 – Hardy World Site Plan - Staff Report](#)
- ☐ [01 - FS17-585 – Hardy World Site Plan - Vicinity Map](#)
- ☐ [02 - FS17-585 – Hardy World Site Plan](#)
- ☐ [03 - FS17-585 – Hardy World Site Plan - Elevations](#)
- ☐ [04 - FS17-585 – Hardy World Site Plan - Landscape](#)
- ☐ [05 - FS17-585 – Hardy World Site Plan - Presentation](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

Hobart Wingard, Planner II

SITE PLAN AMENDMENT

REPORT TO THE PLANNING AND ZONING COMMISSION

Case: FS17-585

Project Name: Hardy World

Council District: 6 – Palo Verde

Meeting Date: March 1, 2018

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

Owner: Hardy World LLC

Applicant: Watson Civil Engineering

Request: Site Plan approval for two (2) Light Industrial buildings within the Surprise Pointe Planned Area Development (PAD).

Site Location: Generally, on the southwestern corner of Dysart and Waddell Roads.

Site Size: Approximately 19.00 acres

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

Support/Opposition: None received by staff

Staff Recommendation: Staff recommends the Commission **approve** the proposed Site Plan, subject to stipulations 'A.' through 'C.'

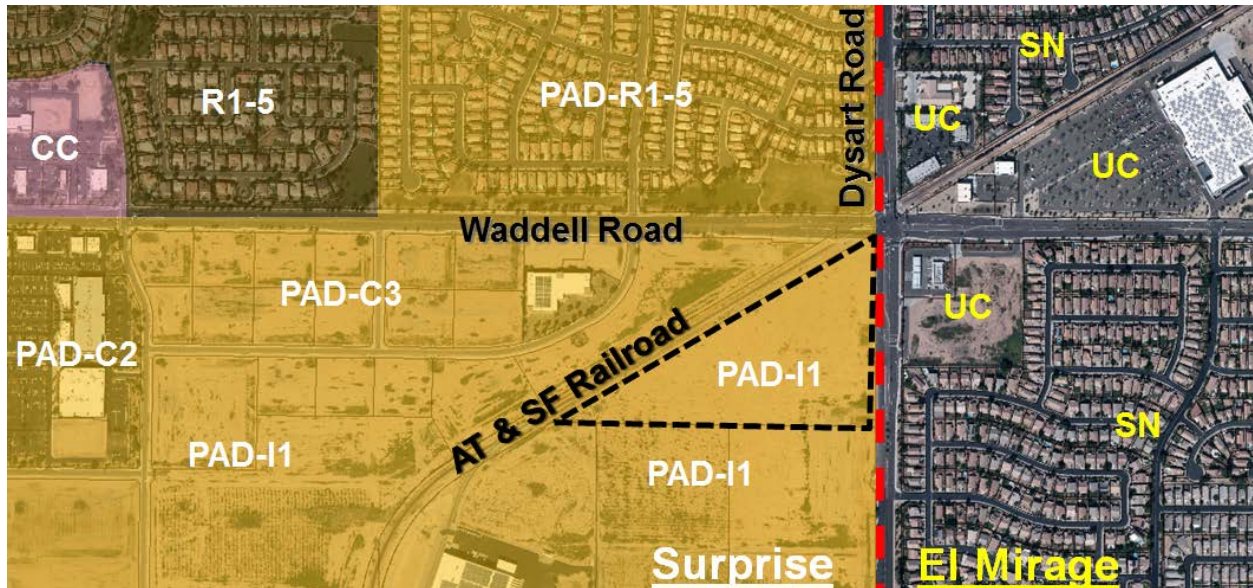
PROJECT DESCRIPTION:

Watson Civil Engineering, on behalf of Hardy World LLC, seeks approval of a Site Plan Amendment to allow a multi-building speculative project in the Surprise Pointe Commercial and Industrial Development. Two (2) buildings will be constructed on the currently vacant parcel. Site improvements will include the buildings, parking, landscaping, sidewalk paving, signage, etc.

EXISTING ZONING:

The following chart and map depicts the existing zoning of the subject site and its surroundings:

Surprise Pointe PAD Vacant PAD-I1	Roseview Residential PAD Existing PAD-R1-5	City of El Mirage Existing Urban Corridor (UC) Zone
Surprise Pointe PAD Vacant PAD-I1	Surprise Pointe PAD PAD-I1	City of El Mirage Existing Urban Corridor (UC) and Suburban Neighborhood (SN) Zone
Surprise Pointe PAD Vacant PAD-I1	Surprise Pointe PAD Vacant PAD-I1	City of El Mirage Existing Suburban Neighborhood (SN) Zone



BACKGROUND:

September 29, 2005: The City Council approved an annexation for the subject property under Case ANX04-416.

February 23, 2006: The City Council approved a PAD for Bendalin Farms, also known as Surprise Pointe, under Case PAD05-282.

November 7, 2006: The Planning and Zoning Commission approved a master site plan for Surprise Pointe under Case SP06-299.

May 18, 2017: The Planning and Zoning Commission approve a site plan for an 84 Lumber truss manufacturing facility on the subject property.

July 27, 2017: Staff met with the applicant for a concept review meeting to discuss the subject project during a regularly scheduled Concept Review meeting under Case CR17-411.

October 4, 2017: The applicant filed a request for a Site Plan under case FS18-585, the subject case.

ANALYSIS AND DISCUSSION:

The subject request involves the development of 48,000 square foot of industrial space distributed between two (2) buildings within the Surprise Pointe Commercial and Industrial PAD. A site plan for a truss manufacturing facility was previously approved on the southern portion of the parcel. The current proposal will focus on the northern half of the property located on the southwest corner of Dysart and Waddell Roads. The northern building contains 36,000 square feet of industrial space while the southern structure will occupy 12,000 square feet and accommodate a masonry sales facility.

Access to the site is gained by dual entrances from Dysart Road. The northern entrance will be a ¾ access with right in, right out, and left in movements provided. A pork chop island will restrict left out movements. The southern entrance provides only right in and right out movements. A currently constructed deceleration lane will accommodate traffic turning into the site. Fronting on Dysart Road, the facilities will share both access and parking. 127 vehicle spaces are distributed throughout the site.

The design of the northern 36,000 square foot building incorporates contemporary architecture that will add visual interest and be complimentary to the Railplex as a whole. The exterior elevations will be comprised of both Exterior Insulation and Finish System (EFIS) stucco finish while the upper half will provide variety with colored cement board panels. The southern building will share the same EFIS finish with a shed style metal roof.

Landscaping will include frontage plantings along Dysart Road for the entire length off the property. Interior landscaping of the facility is dedicated to the portions of the property seen from Dysart Road including trees distributed throughout the parking lot. The rear of the property will include Acacia trees along the railroad corridor to screen rear loading areas. Plant material is exclusively drought tolerant consistent with streetscape landscaping found in other parts of the Railplex industrial facility. While chain link fencing can be utilized in industrial zones, walls seen from public streets will be constructed of decorative block as this area is a recognized Gateway to the city.

UTILITY AND SERVICES TABLE:

Electric:	APS
Water:	City of Surprise
Wastewater:	City of Surprise
Refuse:	Private
Natural Gas:	SWG

CONFORMANCE WITH ADOPTED PLANS:

Surprise General Plan 2035: The Surprise General Plan 2035 shows the subject property as lying within the Employment Character Area, which supports uses such as that proposed.

92 **REVIEWING AGENCIES:**

93 All city reviewing departments have reviewed the request and expressed no objections; however,
94 Planning recommends approval with conditions regarding Trash Enclosure and site walls,
95 Landscape density, and stipulation compliance. The subject Preliminary Plat was also routed to the
96 standard external reviewing agencies, who offered the following comments:

97 **Luke Air Force Base (LAFB):** In an email dated October 12, 2017, LAFB indicates no objections to the
98 request, but advises the applicant review sound attenuation requirements and engage in a strong
99 notification program with respect to the air base and its operations.

100 **Maricopa Water District (MWD):** In an email dated October 5, 2017, MWD indicated the proposal
101 will not impact MWD.

102 **Arizona Department of Transportation (ADOT):** In an email dated October 6, 2017, ADOT
103 indicated the proposal will have no impact on existing highway facilities.

104
105 **SUMMARY:**

106 Staff believes the proposed Site Plan Amendment is consistent with the manner and intent of the
107 Surprise Pointe PAD in which it occupies. Staff recommends stipulations that, once fulfilled, will
108 allow the site to be developed in accordance with the requirements of the City of Surprise.

109
110 **FINDINGS:**

- 111
- The proposed Site Plan Amendment is in compliance with the General Plan.
 - The proposed Site Plan Amendment is in compliance with the criteria set forth in Surprise
112 Municipal Code.
 - The proposed Site Plan Amendment is in compliance with the Surprise Pointe PAD.
 - The reviewing agencies have indicated no objections to the request.
- 115
116

117 **RECOMMENDATION:**

118 Based on the findings noted above, staff recommends the Commission **approve** the subject Site
119 Plan Amend, subject to stipulations 'A.' through 'C.' as outlined below:

- 120 A. The Site Plan, prepared by Watson Civil Engineering, date received January 25, 2018, will
121 be revised and submitted for review to include the following modifications:
1. The label "*CMUY Trash Enclosure*" will be changed to "*CMU Trash Enclosure.*"
 2. Site walls that are visible to Dysart or Waddell Roads will be constructed of
123 decorative CMU block.
- 124
- 125 B. The Landscape Plan, prepared by Metropolitan Green LLC, date received January 25,
126 2018, will be revised and submitted for review to include the following modifications:
1. The label "*soild planting screen*" will be changed to "*solid planting screen.*"
- 127

128 2. The Hesperaloe will be replaced with, or enhanced with, a planting that will provide
129 denser screening.

130 C. Non-compliance with the stipulations of approval of this case will be treated as a
131 violation in accordance with the provisions of Article XIV of the Surprise Unified
132 Development Code.

133 However, should the Commission wish to deny the request, the Commission should make its own
134 findings and base its decision on those alternative findings.

135
136 **Attachments:**

- 137 01 - Vicinity Maps
- 138 02 - Site Plan
- 139 03 - Elevations
- 140 04 - Landscape Plan

VICINITY MAP

FS17-585
Hardy World



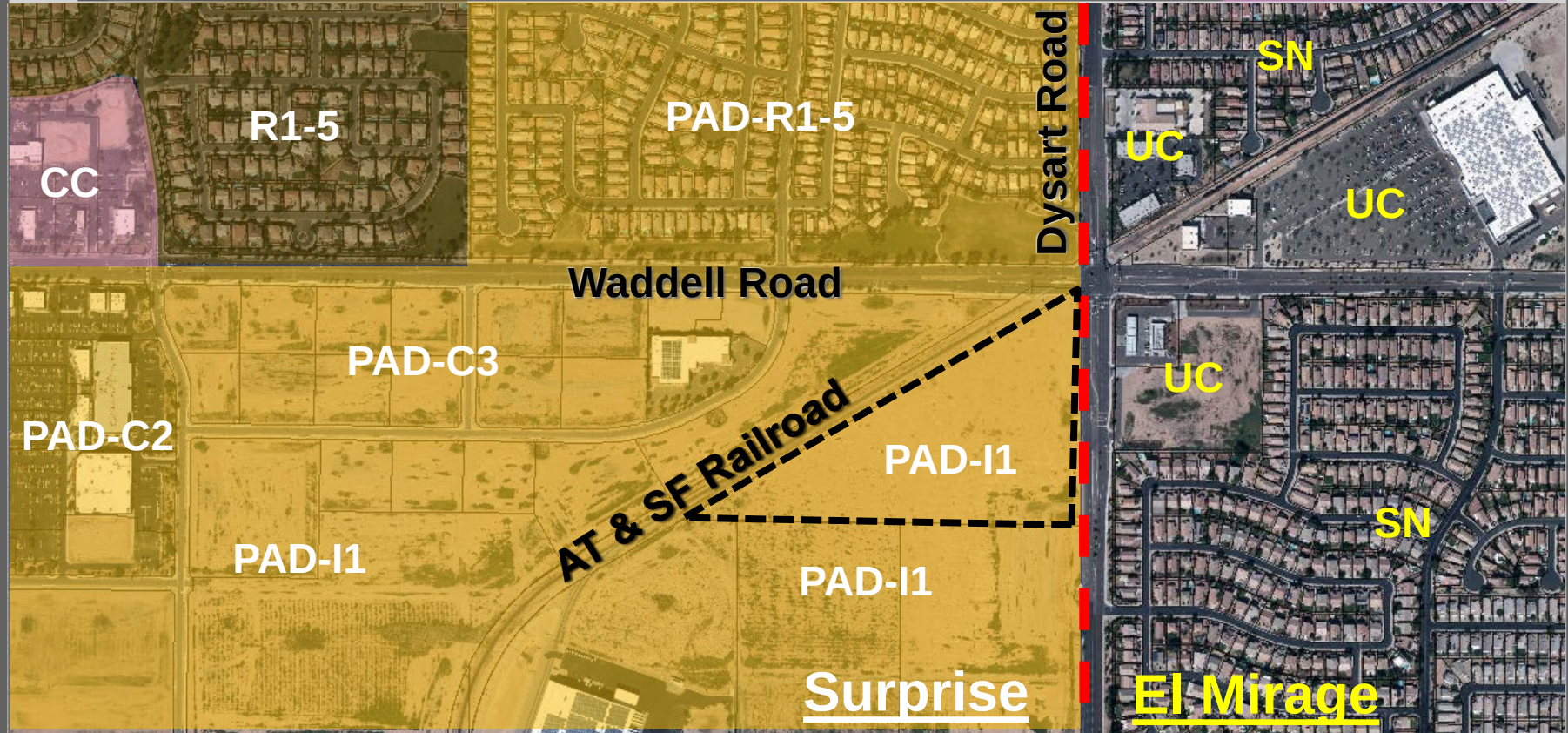
VICINITY MAP

FS17-585
Hardy World

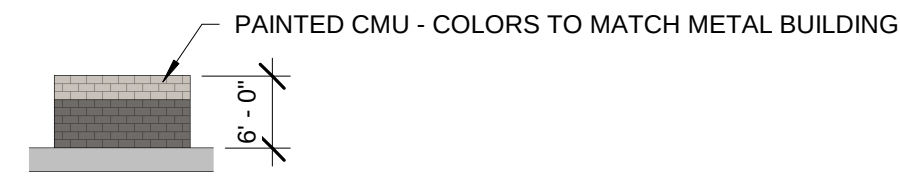


ZONING

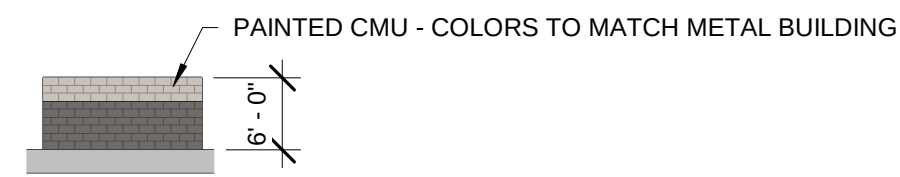
FS17-585
Hardy World



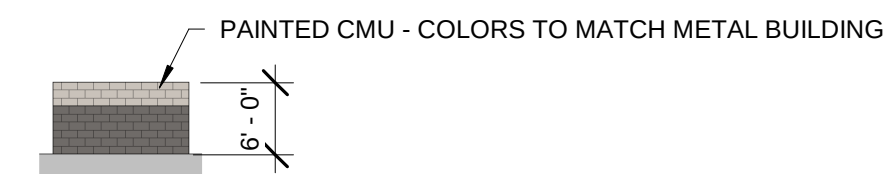
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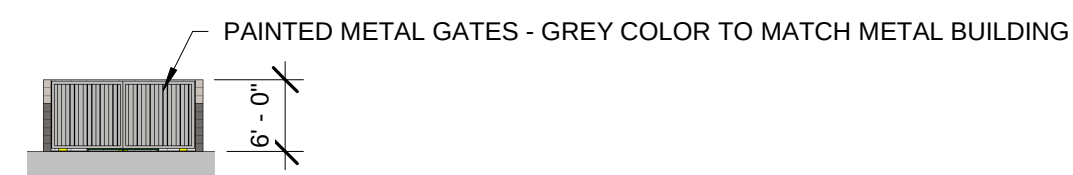
9 TRASH ENCLOSURE - NORTH
1/16" = 1'-0"



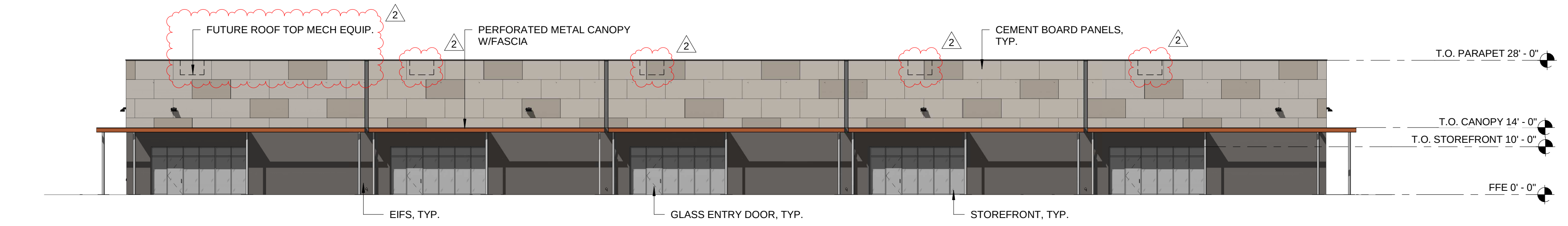
10 TRASH ENCLOSURE - EAST
1/16" = 1'-0"



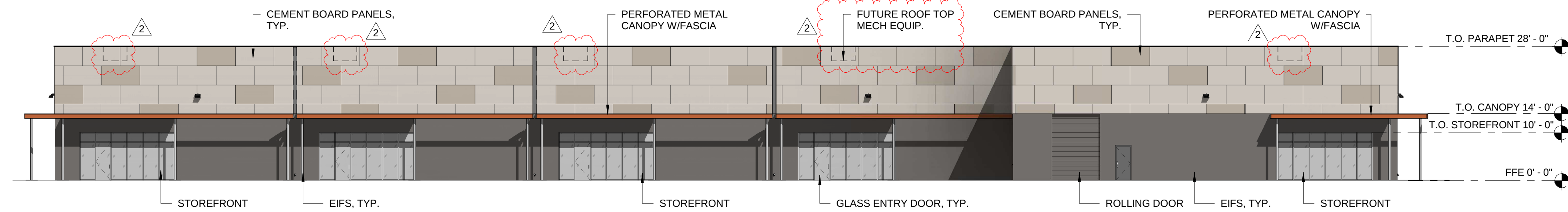
11 TRASH ENCLOSURE - SOUTH
1/16" = 1'-0"



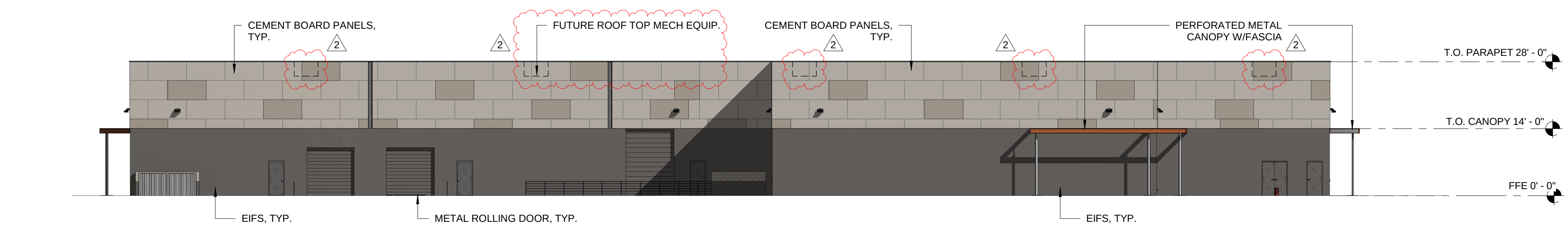
12 TRASH ENCLOSURE - WEST
1/16" = 1'-0"



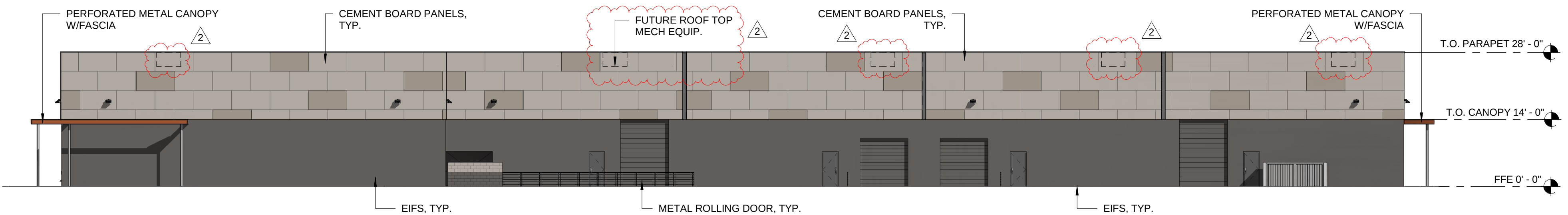
1 FLEX SPACE EAST ELEVATION
1/16" = 1'-0"



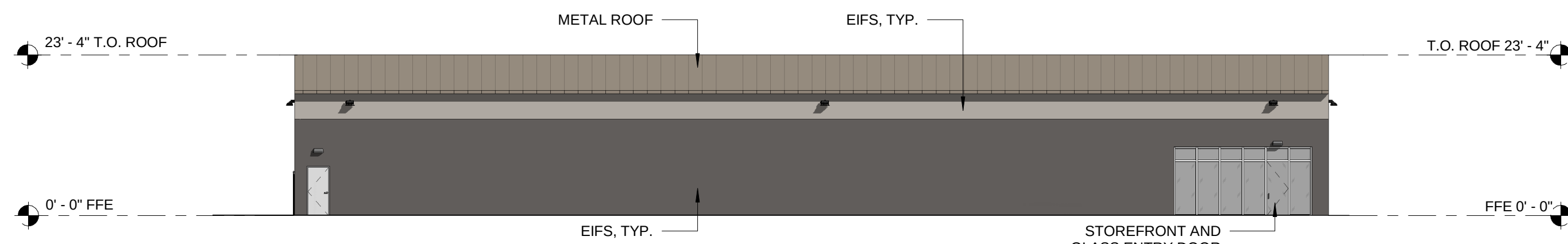
2 FLEX SPACE SOUTH ELEVATION
1/16" = 1'-0"



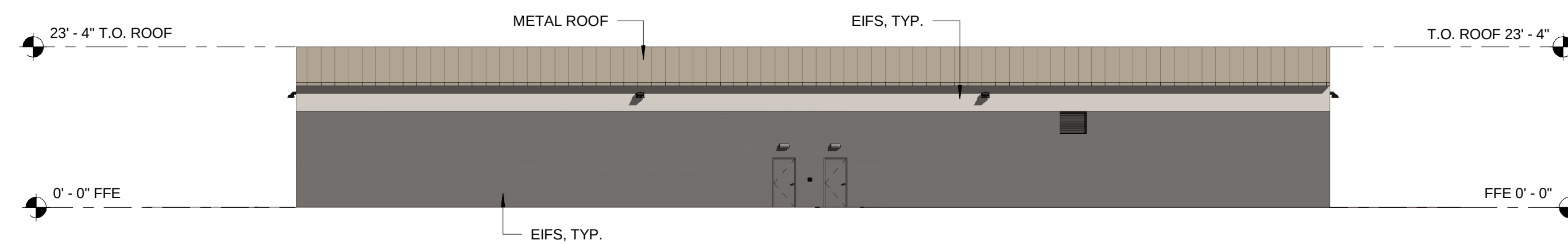
3 FLEX SPACE WEST ELEVATION
1/16" = 1'-0"



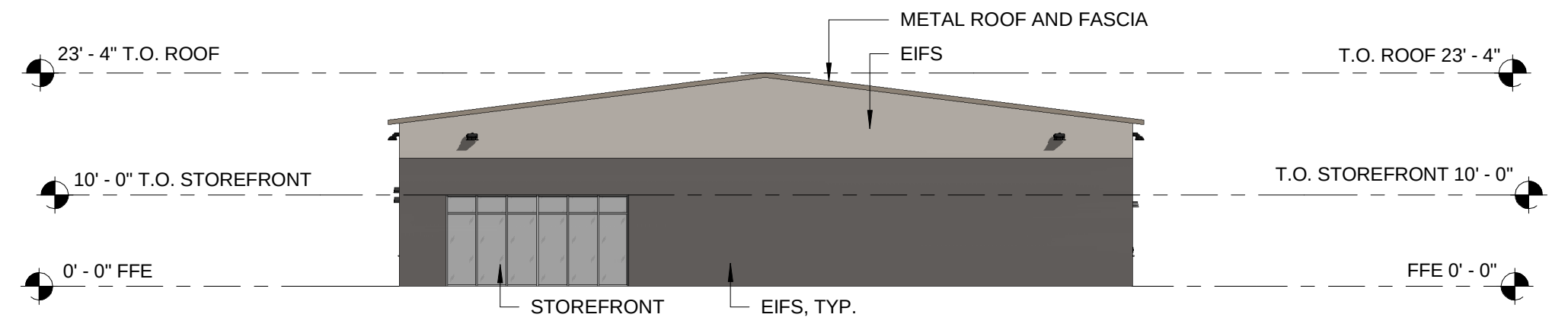
4 FLEX SPACE NORTH ELEVATION
1/16" = 1'-0"



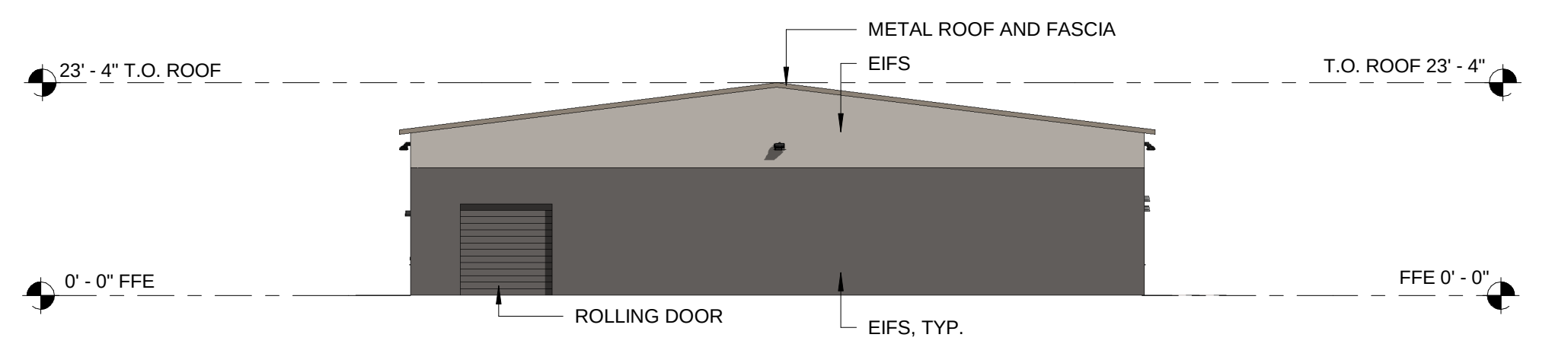
6 METAL BUILDING SOUTH ELEVATION
1/16" = 1'-0"



8 METAL BUILDING NORTH ELEVATION
1/16" = 1'-0"



5 METAL BUILDING EAST ELEVATION
1/16" = 1'-0"



7 METAL BUILDING WEST ELEVATION
1/16" = 1'-0"



MERGE
ARCHITECTURAL
GROUP

600 N 4th ST, SUITE 112
PHOENIX ARIZONA 85004
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F (602) 635 1581
merge@mergeag.com



SEAL:



OWNER INFORMATION

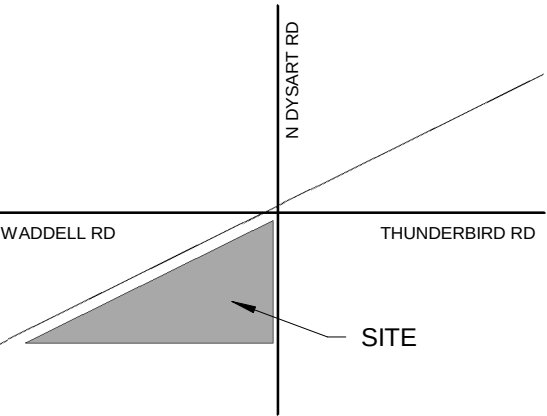
HARDY WORLD, LLC

1019 ROUTE 519, EIGHTY
FOUR, PA 15330



PROJECT: **FLEX SPACE FACILITY**

13568 N DYSART RD, SURPRISE AZ, 85335



VICINITY MAP

REVISIONS:			
MARK	DATE	DESCRIPTION	
2	12/20/17	CITY COMMENTS 2	
1	11/24/17	CITY COMMENTS	

PROJECT NO: 17C-033
DESIGN BY: JAW
CHK'D BY: CAM

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SHEET TITLE

**EXTERIOR
ELEVATIONS**

DATE: 01.05.17
SHEET

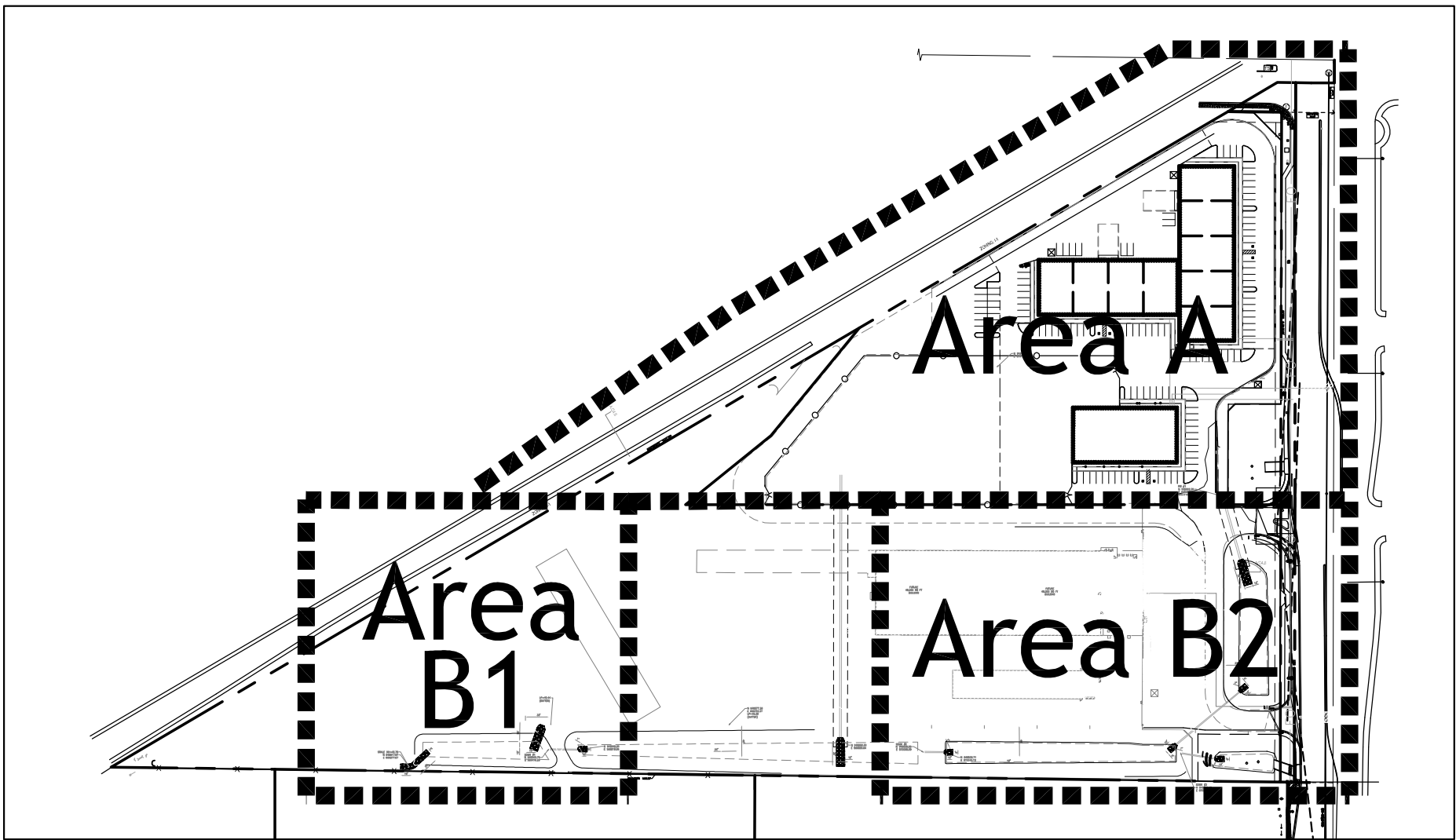
A401

This drawing is the property of Metropolitan Green, LLC, and is a tool for construction services. This drawing was prepared for a specific site and shall not be utilized or reproduced for any other means. It is prohibited to copy or publish any portion of this drawing (entire or in part) without the written consent of Metropolitan Green, LLC.

GENERAL LANDSCAPE NOTES

- THESE PLANS ILLUSTRATE DESIGN INTENT AND SHOW PROXIMITY OF ELEMENTS. CONTRACTOR IS RESPONSIBLE FOR VERIFY SITE CONDITIONS PRIOR TO WORK. ANY DISCREPANCIES SHALL BE BROUGHT TO THE ATTENTION OF OWNER OR LANDSCAPE ARCHITECT.
- CONTRACTOR SHALL NOT IMPEDE OR ALTER SET DRAINAGE PATTERNS, WALKS AND DECKS SHALL DRAIN POSITIVELY AWAY FROM STRUCTURES AT .5% TO 2% MAX.
- CONTRACTOR IS RESPONSIBLE FOR REVIEWING THE CONTENT OF CONSTRUCTION PLANS AND SITE TO PRODUCE AN ACCURATE BID.
- QUANTITIES PROVIDED IN LEGENDS ARE FOR CONVENIENCE ONLY. BID SHALL BE BASED ON MATERIAL SHOWN ON PLANS.
- CONTRACTOR SHALL ABIDE TO ALL CURRENT FEDERAL, STATE AND LOCAL CODES AND IS RESPONSIBLE FOR ACQUIRING ALL NECESSARY PERMITS.
- CONTRACTOR SHALL CONTACT BLUESTAKE AND BECOME FAMILIAR WITH ALL UNDERGROUND PUBLIC AND PRIVATE UTILITIES, AND PROTECT FROM POSSIBLE DAMAGE. CONTRACTOR IS SOLELY RESPONSIBLE FOR THE COST OF DAMAGED UTILITIES.
- CONTRACTOR IS RESPONSIBLE FOR THE SAFETY OF OWNER, EMPLOYEES, AND SUBCONTRACTORS. THIS INCLUDES THE SAFETY OF THE SITE AND ADJACENT PROPERTIES THROUGH THE DURATION OF CONSTRUCTION.
- THE SITE SHALL BE MAINTAINED IN A NEAT AND ORDERLY CONDITION THROUGHOUT THE INSTALLATION. WASTE MATERIAL SHALL BE REMOVED AND DISPOSED OF DAILY.
- TOOLS AND EQUIPMENT USED ON SITE ARE THE RESPONSIBILITY OF THE CONTRACTOR.
- COORDINATE THE INSTALLATION WITH OTHER TRADES TO ELIMINATE DELAYS OR OVERCHARGES.
- THESE NOTES ARE TO BE USED FOR GENERAL REFERENCE IN CONJUNCTION WITH, AND AS A SUPPLEMENT TO THE WRITTEN SPECIFICATIONS, APPROVED ADDENDA, AND CHANGE ORDERS ASSOCIATED WITH THESE LANDSCAPE IMPROVEMENT DOCUMENTS.
- THE CONTRACTOR SHALL FAMILIARIZE THEMSELVES WITH THE LOCATIONS OF EXISTING AND FUTURE UNDERGROUND SERVICES AND IMPROVEMENTS WHICH MAY CONFLICT WITH THE WORK TO BE DONE. PRIOR TO THE START OF WORK, ALL UNDERGROUND UTILITIES ARE TO BE LOCATED AND PROTECTED. CONTRACTOR IS RESPONSIBLE FOR THE INITIAL CALL AND FUTURE UPDATES TO BLUE STAKES AT 602-263-1100 OR ARIZONA-811 OR ARIZONA811.COM
- BEFORE WORK BEGINS ON THE PROJECT, THE CONTRACTOR SHALL REVIEW THE PROJECT WITH THE OWNER AND/OR OWNER'S REPRESENTATIVE. THE CONTRACTOR SHALL VERIFY CRITICAL DIMENSIONS, REFERENCE POINT LOCATIONS, AND CONSTRUCTION CONDITIONS PRIOR TO INITIATING CONSTRUCTION. NOTIFY THE OWNER AND LANDSCAPE ARCHITECT SHOULD CONFLICTS ARISE, OR IF PLANS DIFFER FROM FIELD CONDITIONS. THE OWNER AND/OR OWNER'S REPRESENTATIVE IS TO APPROVE ANY CHANGES OR SUBSTITUTIONS PRIOR TO THE START OF ANY WORK.
- THE CONTRACTOR SHALL BE RESPONSIBLE UNDER THIS CONTRACT TO REPAIR AND/OR REPLACE, AT THEIR OWN EXPENSE, ANY STRUCTURES, FENCES, WALLS, PLANT MATERIAL, OR OTHER ITEMS DESTROYED DURING CONSTRUCTION. LIKEWISE, THE CONTRACTOR SHALL BE RESPONSIBLE FOR REPAIRING AND/OR REPLACING ANY AND ALL DAMAGES TO ADJACENT PROPERTIES OR ANY OTHER AREAS OUTSIDE THE CONTRACT LIMITS. THE DAMAGED ITEMS/ AREAS WILL BE RESTORED TO THEIR ORIGINAL CONDITION TO THE SATISFACTION OF THE OWNER AND/OR OWNER'S REPRESENTATIVE.

- IT IS THE RESPONSIBILITY OF THE CONTRACTOR TO COORDINATE ALL PLANT MATERIAL LOCATIONS WITH OTHER TRADES PRIOR TO INSTALLATION.
- UNLESS OTHERWISE NOTED ON PLANS, DECOMPOSED GRANITE SHALL EXTEND UNDER SHRUBS AND BE RAKED UNIFORMLY ALONG WALKS, SIDEWALKS, AND CURBS.
- CONTRACTOR SHALL PROVIDE BARRICADES AND TRAFFIC CONTROL ALONG PUBLIC STREETS IF REQUIRED DURING CONSTRUCTION.
- GRADING ON THE PROJECT IS PER THE GRADING PLANS. HOWEVER, ADDITIONAL FINE GRADING WILL BE NECESSARY BY THE LANDSCAPE CONTRACTOR.
- DIFFERENCE BETWEEN THESE PAVED SURFACES AND THE FINISHED GRADE OF ADJACENT AREAS SHALL NOT EXCEED 1/2" .
- REFER TO ENGINEERING PLANS FOR DRAINAGE FLOWS. THE LANDSCAPE CONTRACTOR SHALL BE RESPONSIBLE THAT THESE ARE PROVIDED FOR AND NOT IMPAIRED WITH OBSTRUCTIONS.
- VERIFY PLANT QUANTITIES PRIOR TO BIDDING AND INSTALLATION. QUANTITIES ARE LISTED FOR CONVENIENCE ONLY, THE ACTUAL NUMBER OF SYMBOLS INDICATED ON THE PLANTING PLANS SHALL HAVE PRIORITY OVER QUANTITIES LISTED WITHIN THE PLANT SCHEDULES. THE CONTRACTOR SHALL FURNISH ALL PLANT MATERIAL NECESSARY TO COMPLETE THE PLANTINGS AS SHOWN ON THE PLANS.
- ALL PLANT MATERIAL MUST BE MAINTAINED IN HEALTH AND VIGOR, AND BE ALLOWED TO ATTAIN NATURAL SIZE AND SHAPE IN ACCORDANCE WITH ARIZONA NURSERY ASSOCIATION SPECIFICATIONS.
- UPON DELIVERY, ALL PLANT MATERIAL MUST MEET ARIZONA NURSERY ASSOCIATION SPECIFICATIONS. ALL PLANT MATERIAL SHALL BE INSPECTED BY THE OWNER OR OWNER REP. PRIOR TO ACCEPTANCE.
- DO NOT OVER BURY TREES. SET TREE FLARE AT GRADE. PLANT ALL MATERIAL ACCORDING TO ENCLOSED DETAILS.
- TREES MUST BE PLACED A MINIMUM OF 7' FROM ANY FIRE HYDRANTS. SHRUBS AND GROUNDCOVERS MUST BE PLACED A MINIMUM OF 5'-0" FROM ANY FIRE HYDRANT.
- PLANT MATERIAL SHALL BE LOCATED AWAY FROM OBSTACLES (3' MIN.) SUCH AS TRANSFORMERS, POWER POLES, AND LIGHT FIXTURES AS NECESSARY. NO IMPROVEMENTS SHALL BE DONE IN ANY AREA WHICH WILL CAUSE HARM TO ADJACENT IMPROVEMENTS.
- ALL NURSERY STAKING AND HARDWARE TO BE REMOVED FROM TREES.
- PLANTING METHODS, SOIL AMENDMENT QUANTITIES (IF ANY), AND PREPARATION METHODS SHALL BE INSTALLED ACCORDING TO THE PLANTING SPECIFICATIONS AND DETAILS.
- ALL PLANTING AREAS SHALL HAVE WEED FREE CONDITIONS.
- HOLE AUGER USE IS NOT PERMITTED FOR ANY PLANTING.
- EXAMINE AND PRUNE TREES FOR GUTTLING ROOTS PRIOR TO PLANTING. BRUSH AWAY TOPSOIL OVER TREE FLARE AND PLANT TREE FLARE FLUSH WITH GRADE.



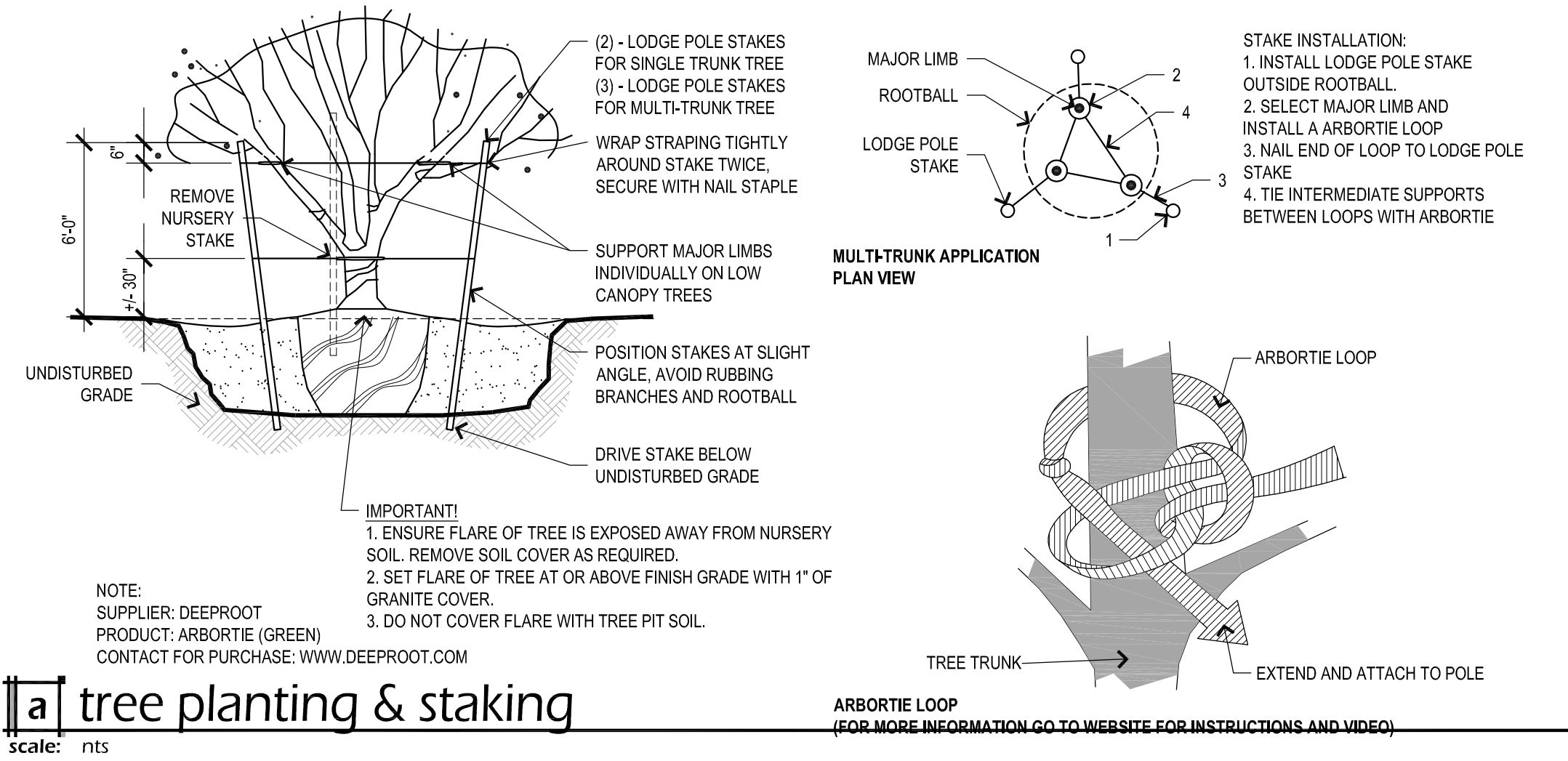
key map

LANDSCAPE SHEET INDEX

SHEET	TITLE	PAGE #
L1.0	COVER & LANDSCAPE NOTES	1
L2.0	LANDSCAPE PLAN	2
L3.0	LANDSCAPE PLAN	3
L4.0	IRRIGATION PLAN	4
L5.0	IRRIGATION PLAN	5
L6.0	LANDSCAPE / IRR DETAILS	6
L7.0	IRRIGATION SPECIFICATION	7

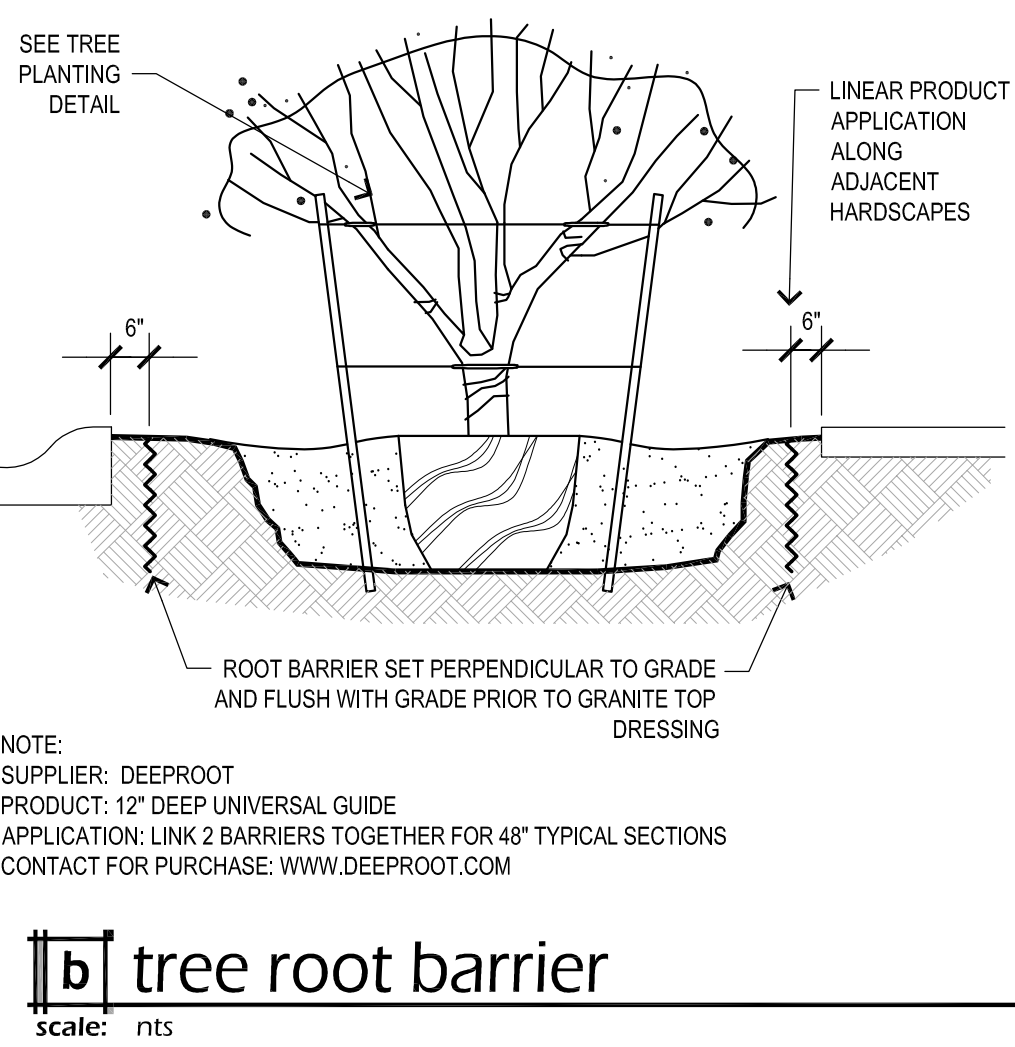
PROJECT CONSULTANTS

DISCIPLINE	CONTACT INFORMATION
OWNER / DEVELOPER:	Hardy world, LLC Aaron Henderson 724-228-8820 x 1349 aaron.henderson@84lumber.biz
CIVIL ENGINEER:	Watson Civil Engineering Joel Watson, P.E. 480-330-0803 joel@watsoncivilengineering.com
LANDSCAPE ARCHITECT:	Metropolitan Green, LLC Zachary Kiebke, RLA 480-560-8932 zachary@metropolitan-green.com



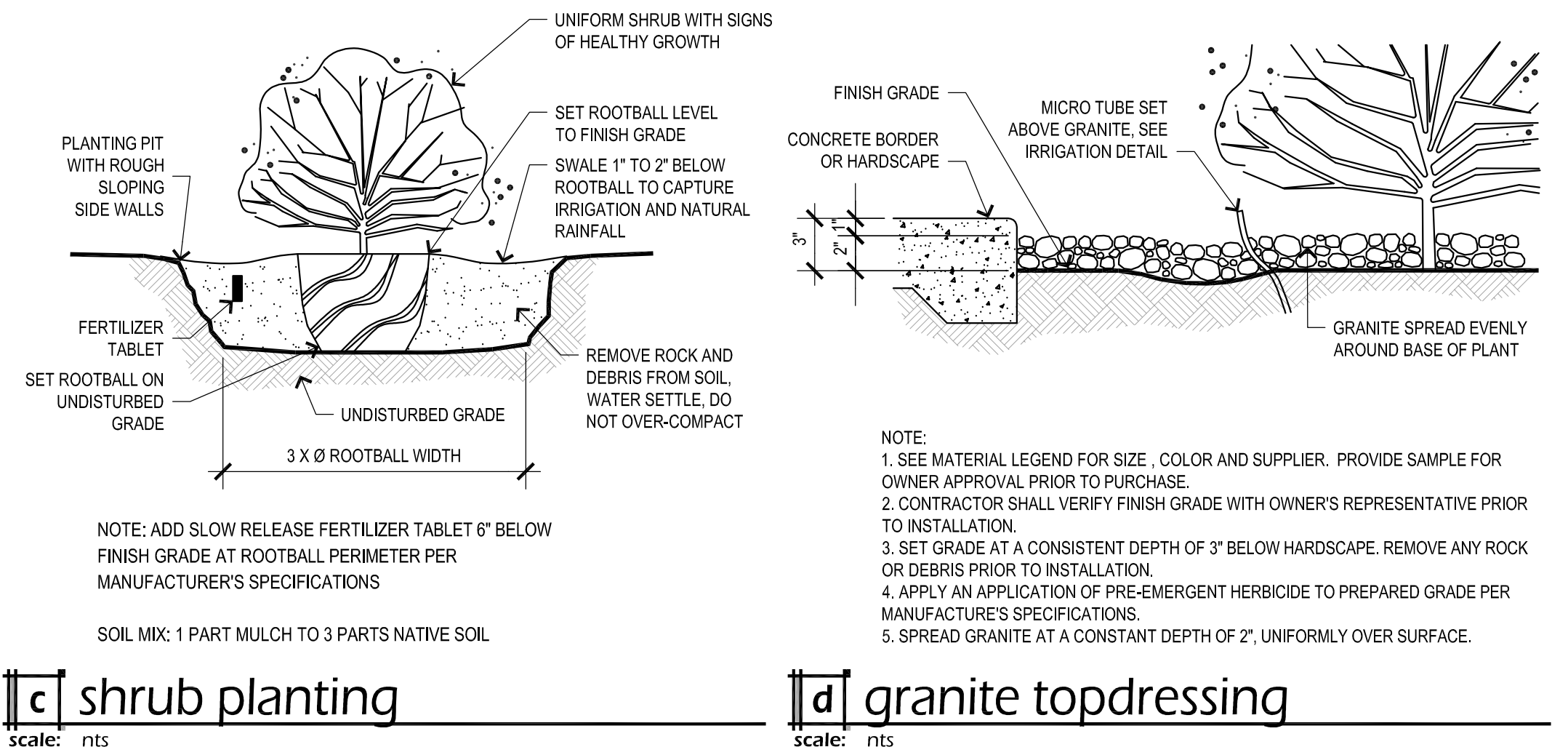
a tree planting & staking

scale: nts



b tree root barrier

scale: nts



c shrub planting

scale: nts

d granite topdressing

scale: nts

LANDSCAPE CALCULATIONS:

GROSS AREA: +/- 6.48 ACRES
PROVIDED OPEN SPACE: .69 ACRES (10%)
ON-SITE LANDSCAPE AREA: .69 AC.
OFF-SITE LANDSCAPE AREA: 0 AC.
TOTAL: .69 AC.
TOTAL TURF AREA: 0.00 AC. (0%)

MAINTENANCE NOTE:

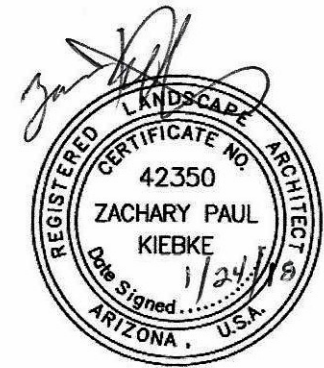
1. All landscape areas and materials shall be maintained in a healthy, neat, clean, and weed-free condition.
This shall be the responsibility of the OWNER.

Hardy World Flex Industrial Building

SWC Waddell Rd. & Dysart Rd.
Surprise, Arizona

LANDSCAPE PLANS

Metropolitan Green
landscape architecture for greener living!
zachary@metropolitan-green.com
480.560.8932
LLC



DATE: 1/24/2018
REV. 1: -
REV. 2: -
REV. 3: -

COVER SHEET

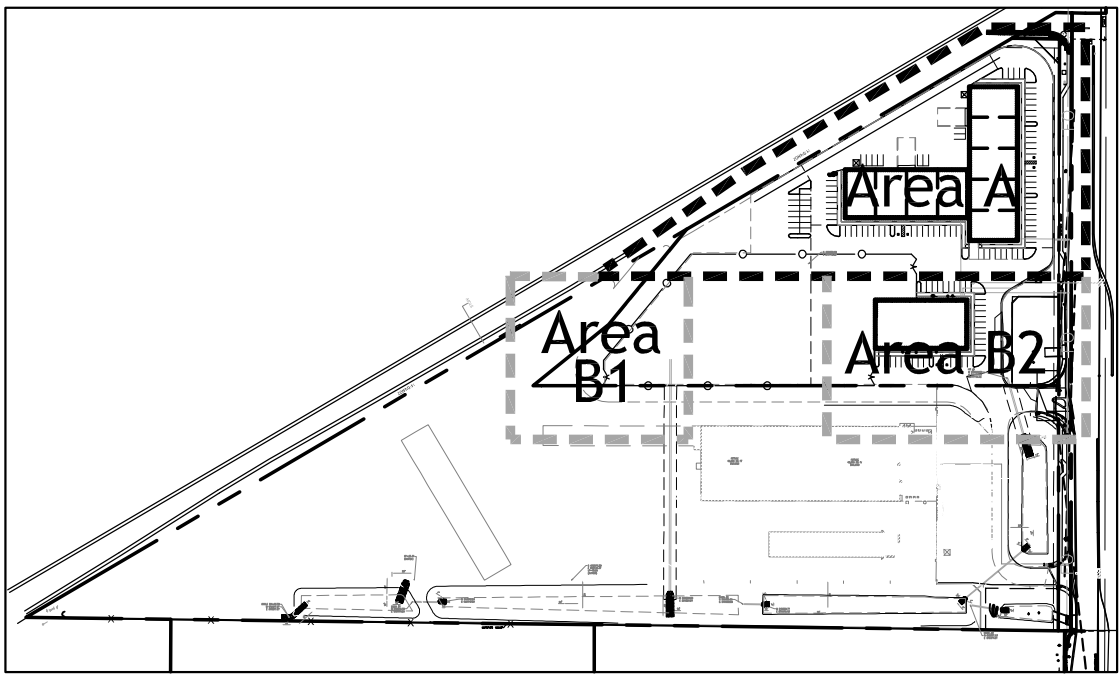
1.0
SHEET
1 OF 7

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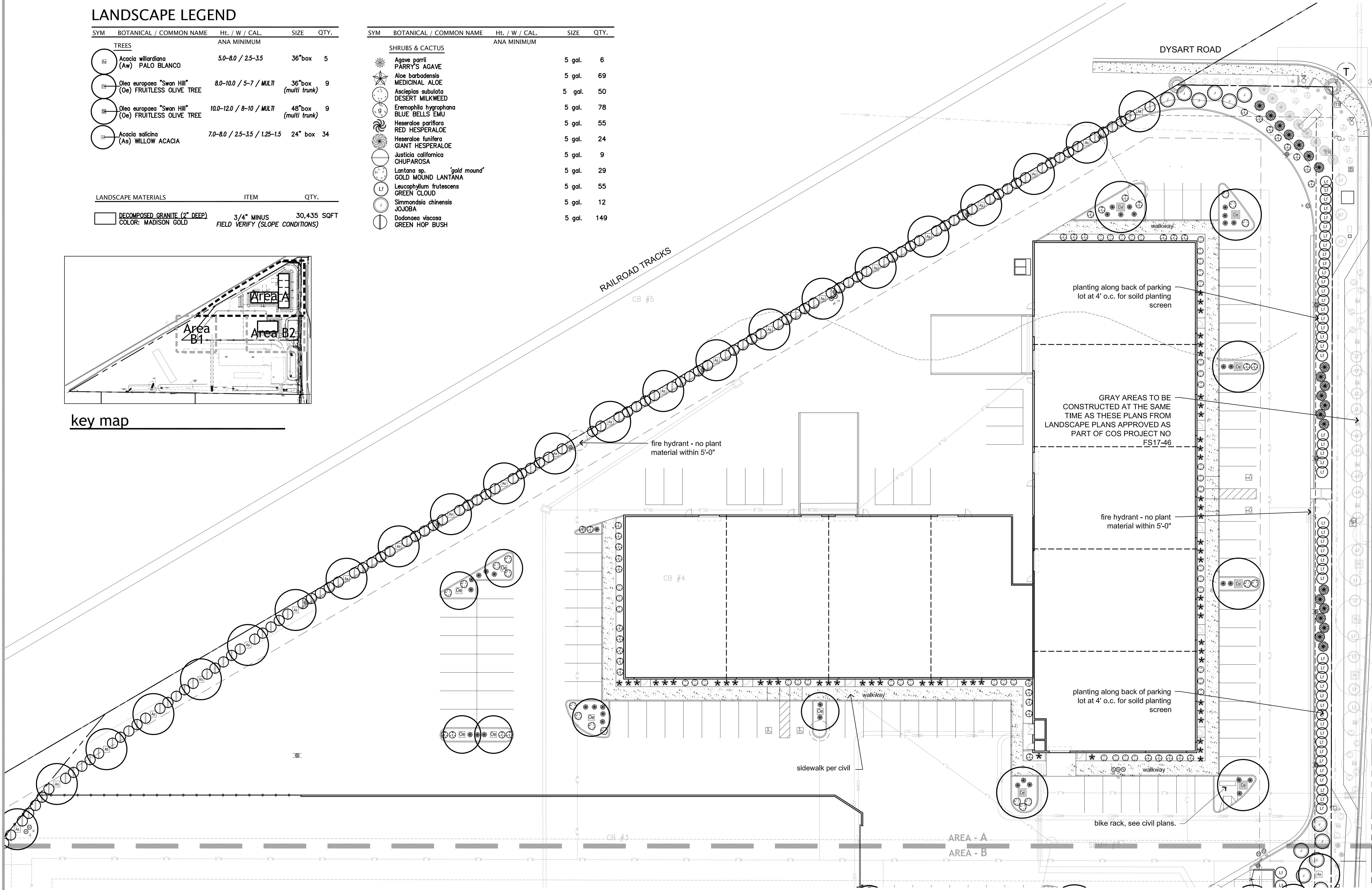
LANDSCAPE LEGEND

SYM	BOTANICAL / COMMON NAME	Ht. / W / CAL.	SIZE	QTY.
TREES				
ANA MINIMUM				
(Aw)	Acacia willardiana PALO BLANCO	5.0-8.0 / 2.5-3.5	36"box	5
(Oe)	Olea europaea "Swan Hill" FRUITLESS OLIVE TREE	8.0-10.0 / 5-7 / MULTI	36"box (multi trunk)	9
(Oe)	Olea europaea "Swan Hill" FRUITLESS OLIVE TREE	10.0-12.0 / 8-10 / MULTI	48"box (multi trunk)	9
(As)	Acacia salicina WILLOW ACACIA	7.0-8.0 / 2.5-3.5 / 1.25-1.5	24" box	34
LANDSCAPE MATERIALS				
ITEM		QTY.		
DECOMPOSED GRANITE (2" DEEP) COLOR: MADISON GOLD		3/4" MINUS FIELD VERIFY (SLOPE CONDITIONS) 30,435 SQFT		

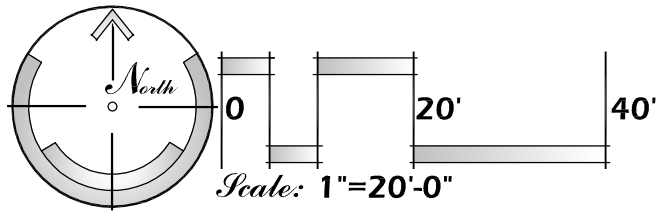
SYM	BOTANICAL / COMMON NAME	Ht. / W / CAL.	SIZE	QTY.
SHRUBS & CACTUS				
ANA MINIMUM				
(Ag)	Agave parvifolius PARRY'S AGAVE		5 gal.	6
(Al)	Aloe barbadensis MEDICINAL ALOE		5 gal.	69
(Am)	Asclepias tuberosa DESERT MILKWEED		5 gal.	50
(Em)	Eremophila hyphophaea BLUE BELLS EMU		5 gal.	78
(Hr)	Hesperaloe parviflora RED HESPERALOE		5 gal.	55
(Hf)	Hesperaloe funifera GIANT HESPERALOE		5 gal.	24
(Jc)	Justicia californica CHUPAROSA		5 gal.	9
(Ls)	Lantana sp. GOLD MOUND LANTANA	'gold mound'	5 gal.	29
(Lf)	Leucophyllum frutescens GREEN CLOUD		5 gal.	55
(Jc)	Simmondsia chinensis JOJOBA		5 gal.	12
(Dv)	Dodonaea viscosa GREEN HOP BUSH		5 gal.	149



key map



area - A



DATE: 1/24/2018
REV. 1: -
REV. 2: -
REV. 3: -

LANDSCAPE
PLAN
2.0
SHEET
2 OF 7

Hardy World Flex Industrial Building
SWC Waddell Rd. & Dysart Rd.
Surprise, Arizona
LANDSCAPE PLANS

Metropolitan Green
landscape architecture for greener living!
zachary@metropolitan-green.com
480.560.8932

[illegible]

The site plan illustrates the proposed 100-unit multi-family residential development. The building footprint is shown with a central corridor and two wings. The plan includes a detailed parking lot with 100 spaces, a bike rack, and a walkway. Landscaping is indicated by various tree and shrub symbols, with specific callouts for 'double check valve assembly', 'trash enclosure, see civil', 'firehydrant - no plant material within 5'-0"', and 'drainage structure per civil plans'. The plan also shows the 'landscape limit of work (survey boundary)' and 'GRAY AREAS TO BE CONSTRUCTED AT THE SAME TIME AS THESE PLANS FROM LANDSCAPE PLANS APPROVED AS PART OF COS PROJECT NO FS17-46'. The site is bounded by Dysart Road to the north and east, and a utility line to the south.

AREA - A
AREA - B

double check valve assembly

trash enclosure, see civil

firehydrant - no plant material within 5'-0"

walkway

bike rack, see civil plans.

GRAY AREAS TO BE CONSTRUCTED AT THE SAME TIME AS THESE PLANS FROM LANDSCAPE PLANS APPROVED AS PART OF COS PROJECT NO FS17-46

drainage structure per civil plans

landscape limit of work (survey boundary)

DYSART ROAD

SYM	BOTANICAL / COMMON NAME	Ht. / W / CAL.	SIZE	QTY.
	<u>SHRUBS & CACTUS</u>	ANA MINIMUM		
	Agave parvifolia PARRY'S AGAVE		5 gal.	6
	Aloe barbadensis MEDICINAL ALOE		5 gal.	69
	Asclepias subulata DESERT MILKWEED		5 gal.	50
	Eremophila hydropatha BLUE BELLS EMU		5 gal.	78
	Hesperaloe parviflora RED HESPERALOE		5 gal.	55
	Hesperaloe funifera GIANT HESPERALOE		5 gal.	24
	Justicia californica CHUPAROSA		5 gal.	9
	Lantana sp. GOLD MOUND LANTANA	'gold mound'	5 gal.	29
	Leucophyllum frutescens GREEN CLOUD		5 gal.	55
	Simmondsia chinensis JOJOBA		5 gal.	12
	Dodonaea viscosa GREEN HOP BUSH		5 gal.	149



Metropolitan Green
landscape architecture for greener living! LLC
zachary@metropolitan-green.com 480-560-8932

LANDSCAPE PLANS



SURPRISE
ARIZONA

FS18-585
Hardy World
Site Plan Amendment

Planning and Zoning Commission

March 1, 2018

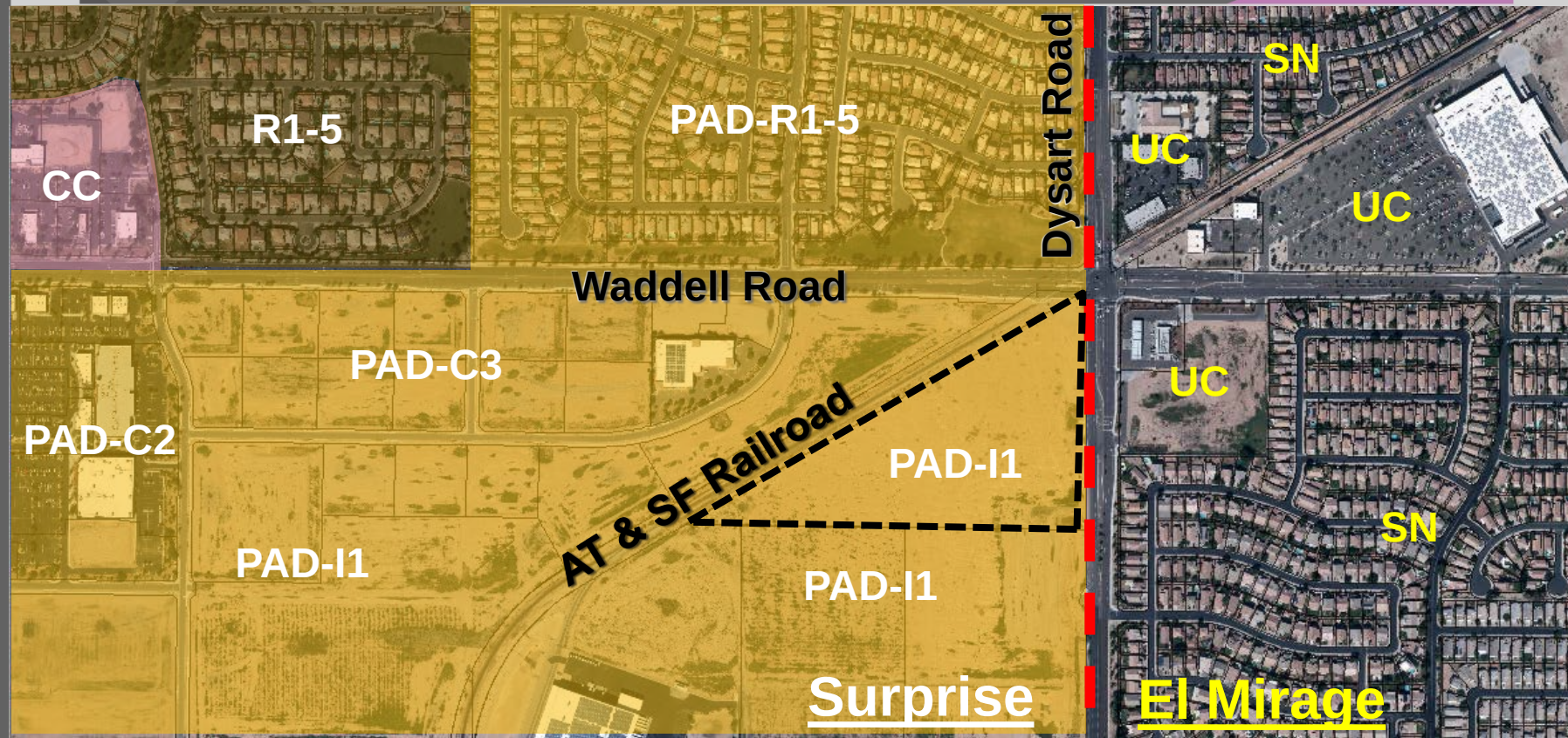
VICINITY MAP



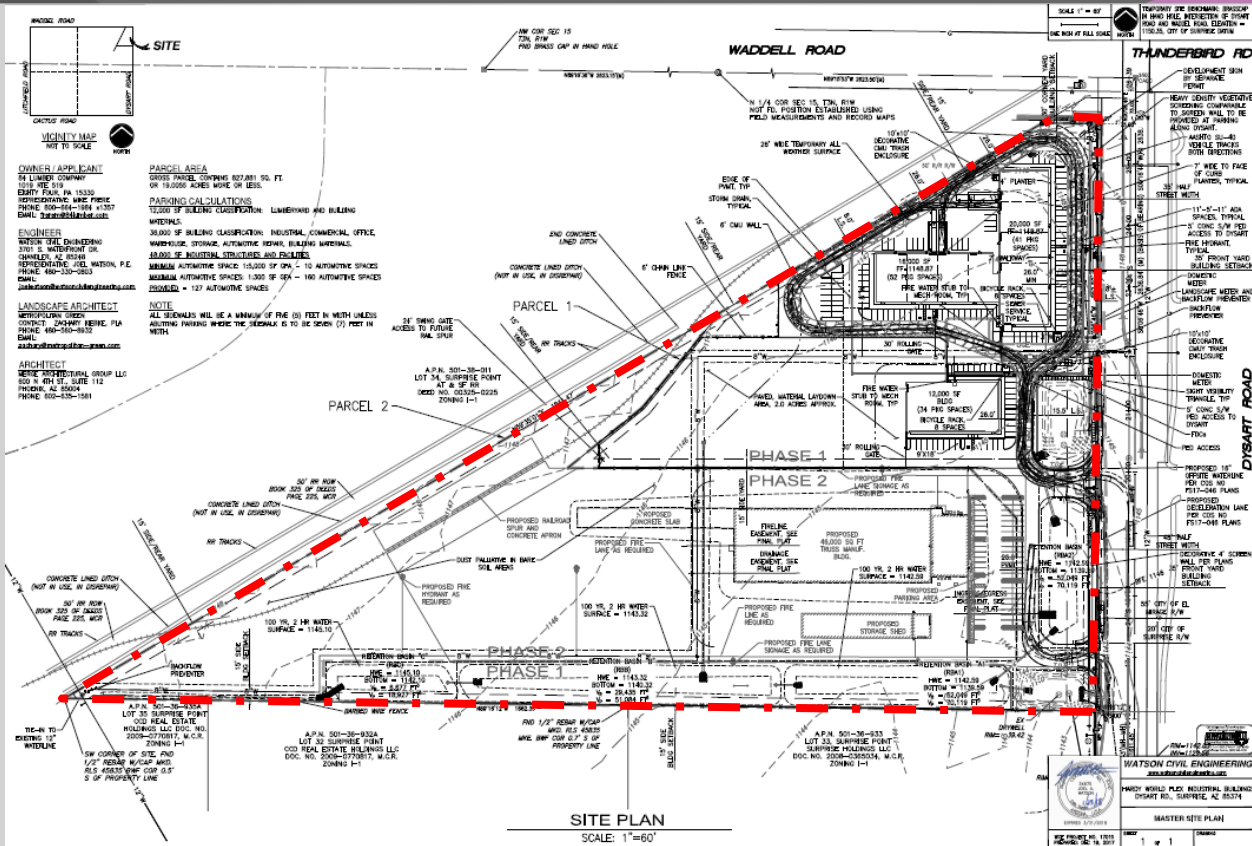
VICINITY MAP



ZONING



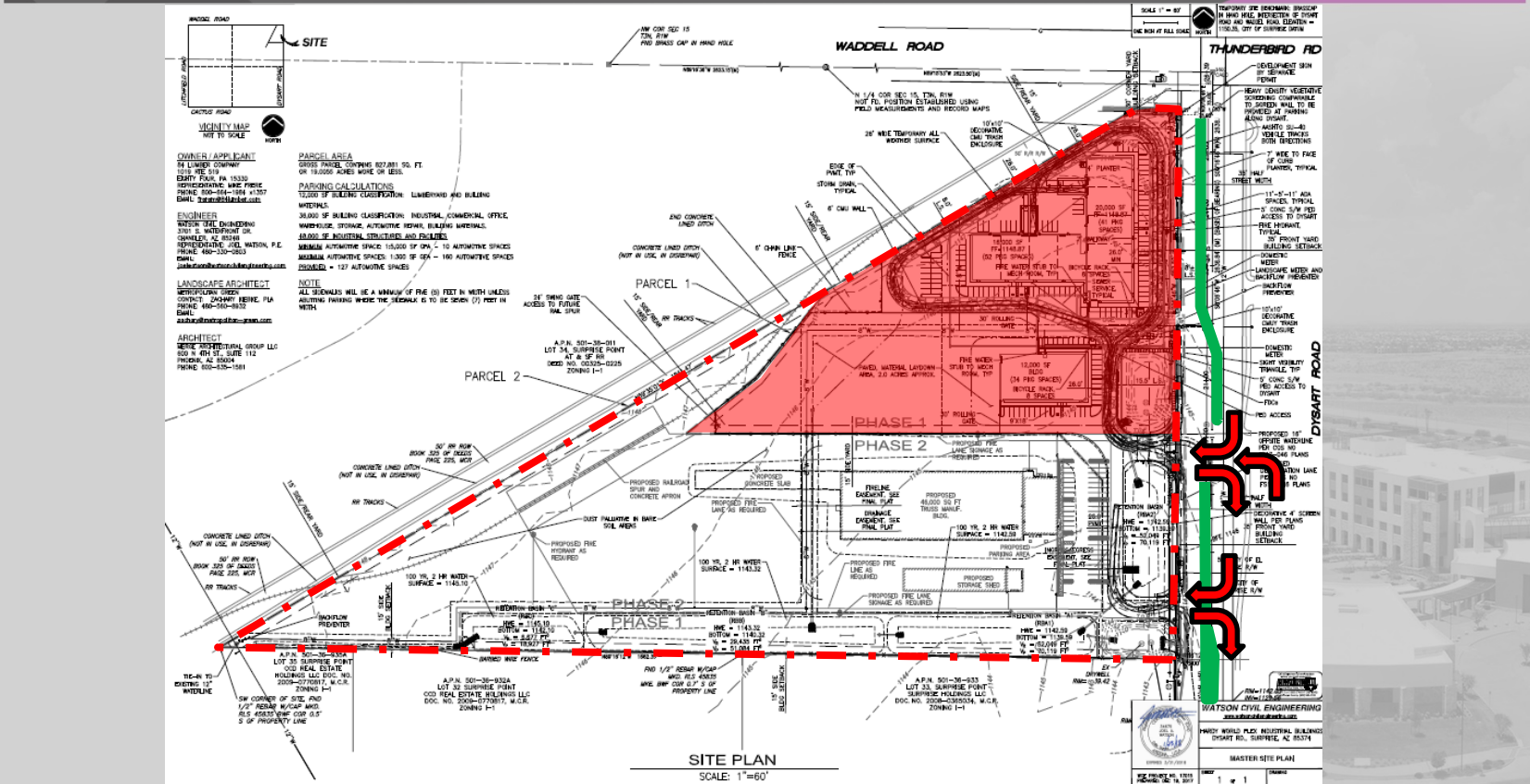
SITE PLAN

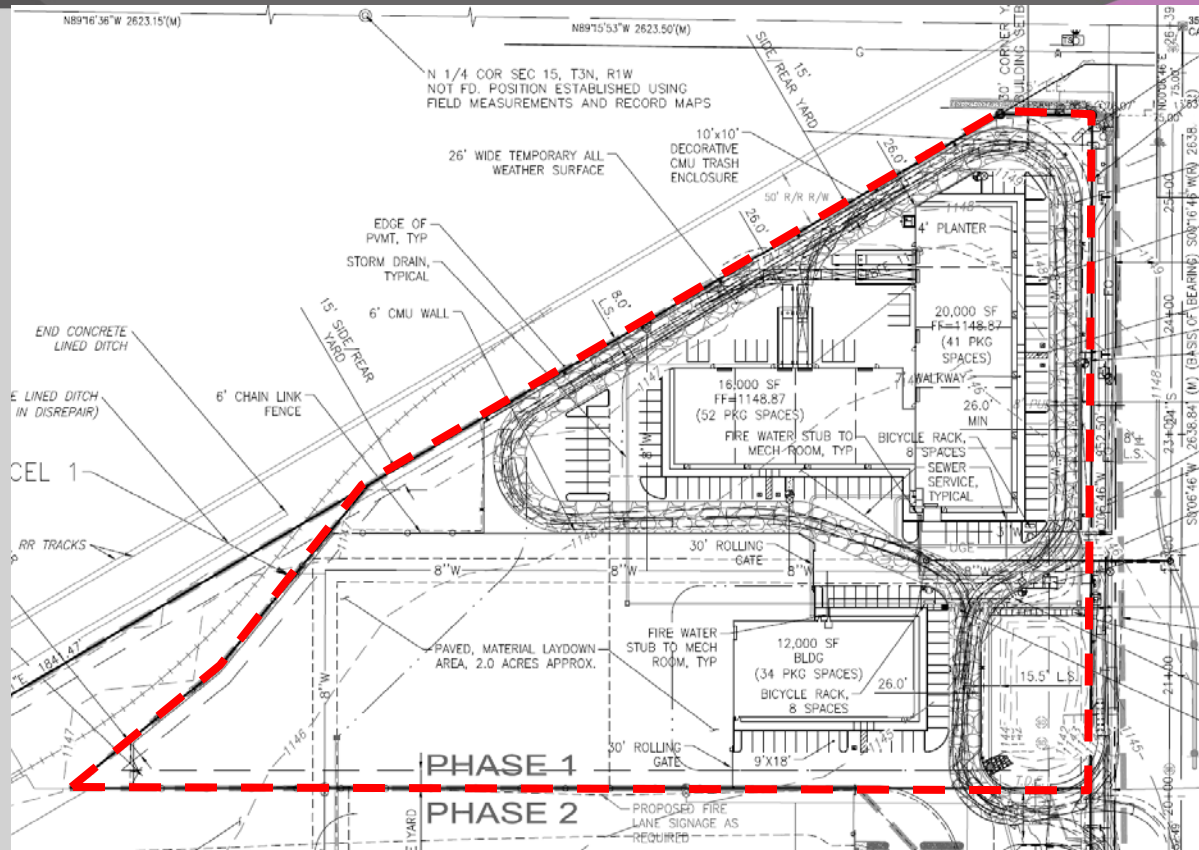


SITE PLAN

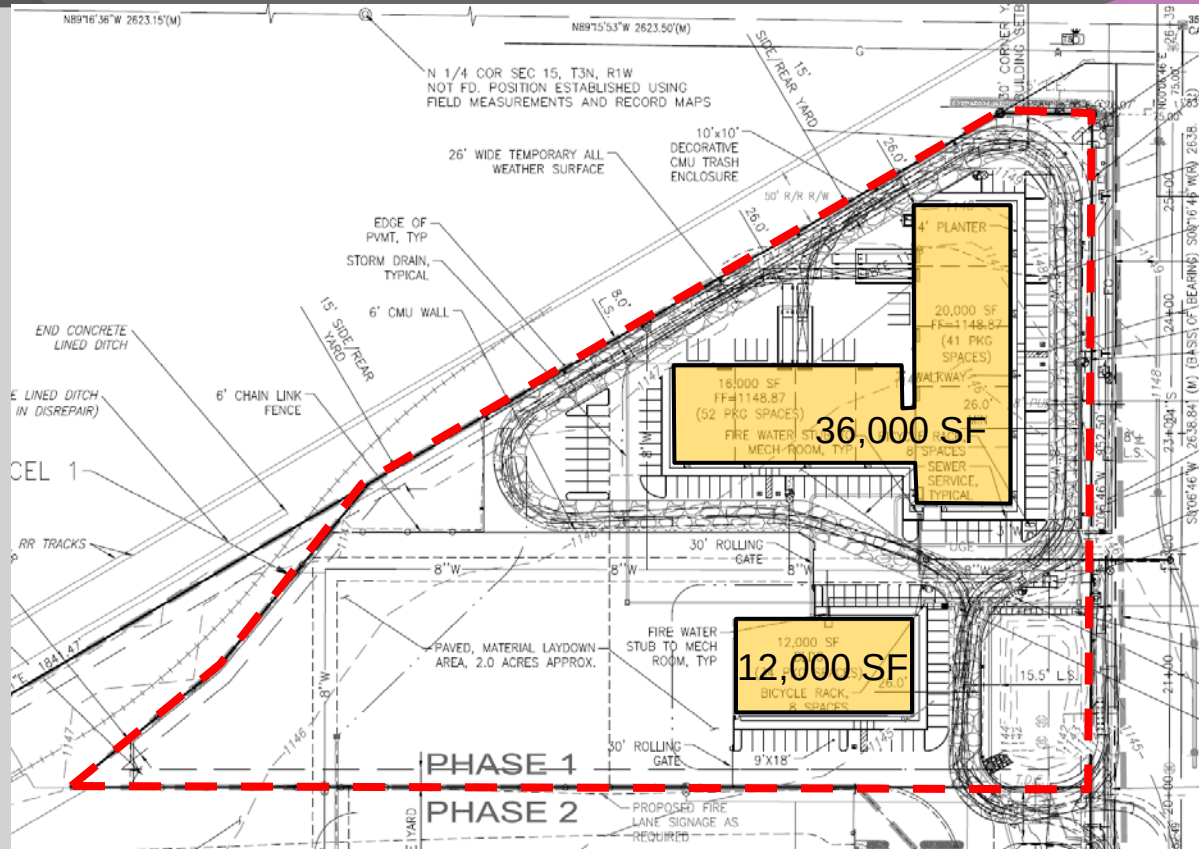


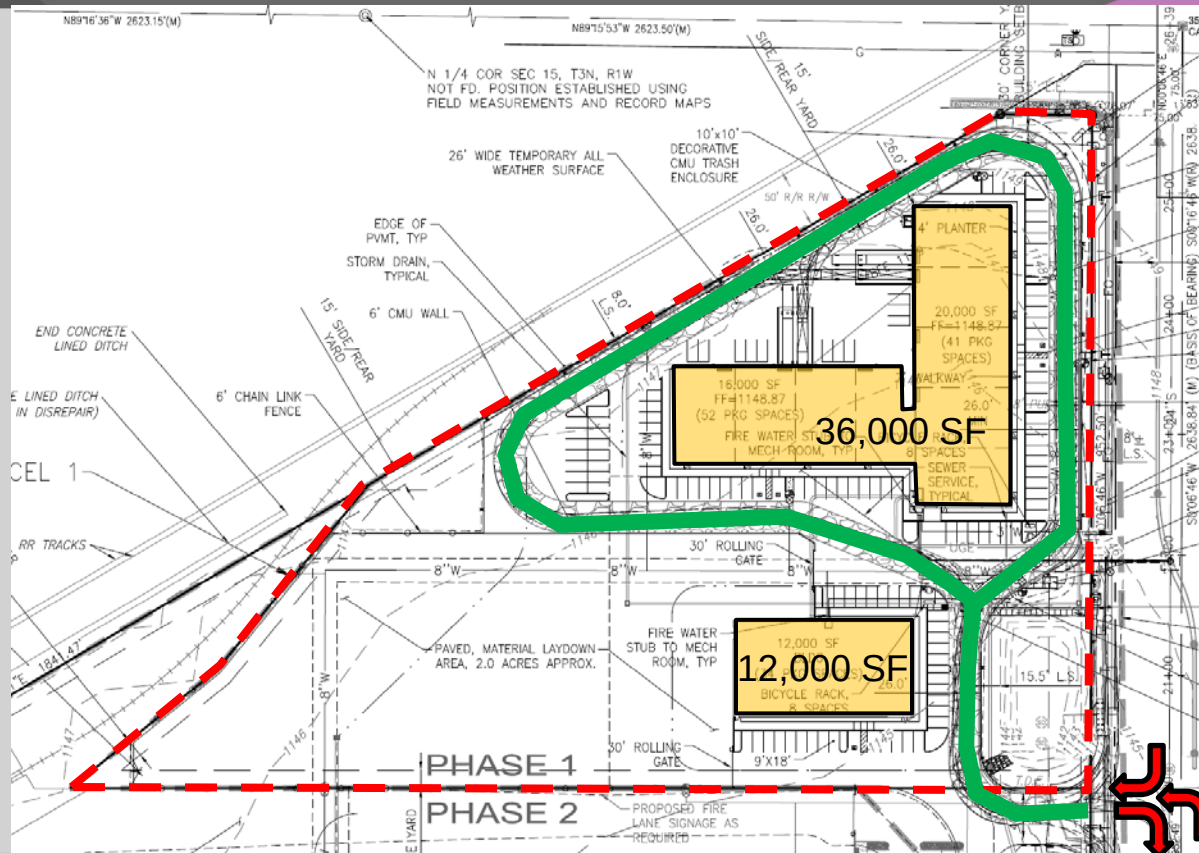
SITE PLAN

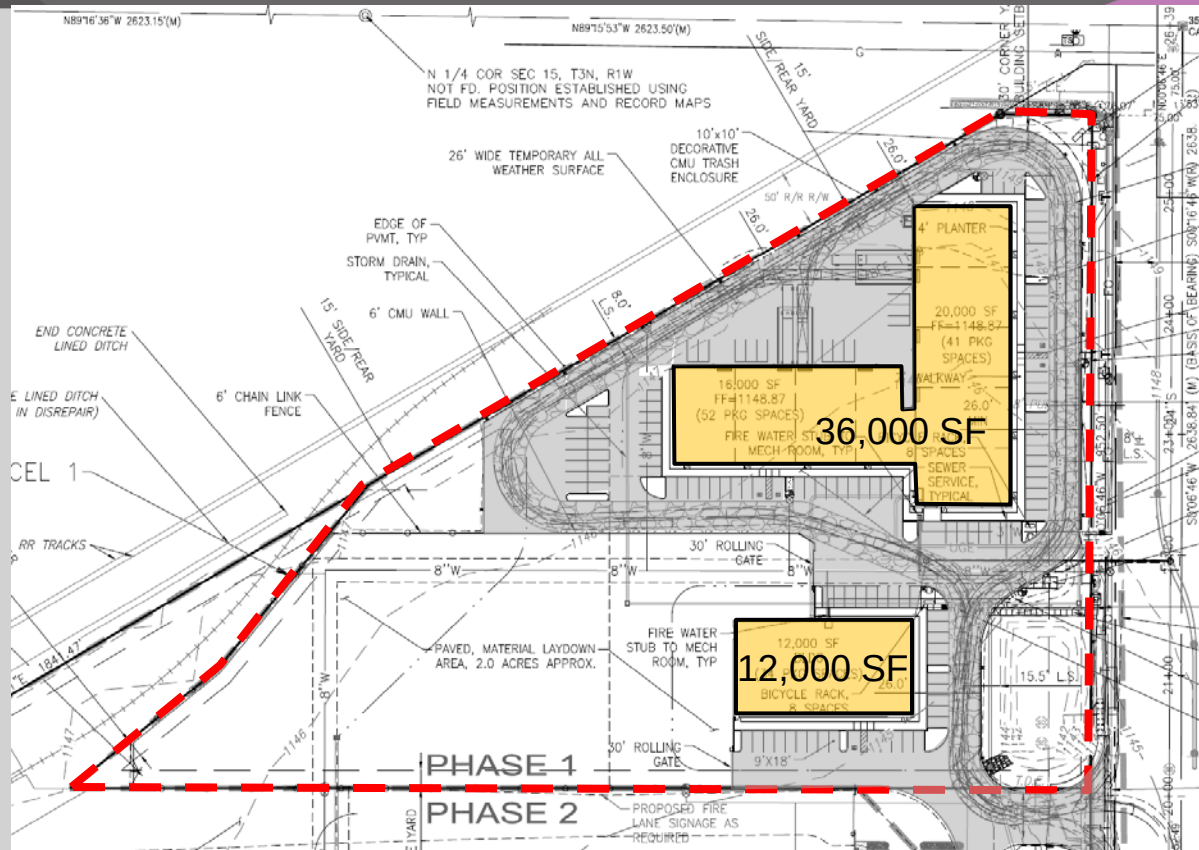


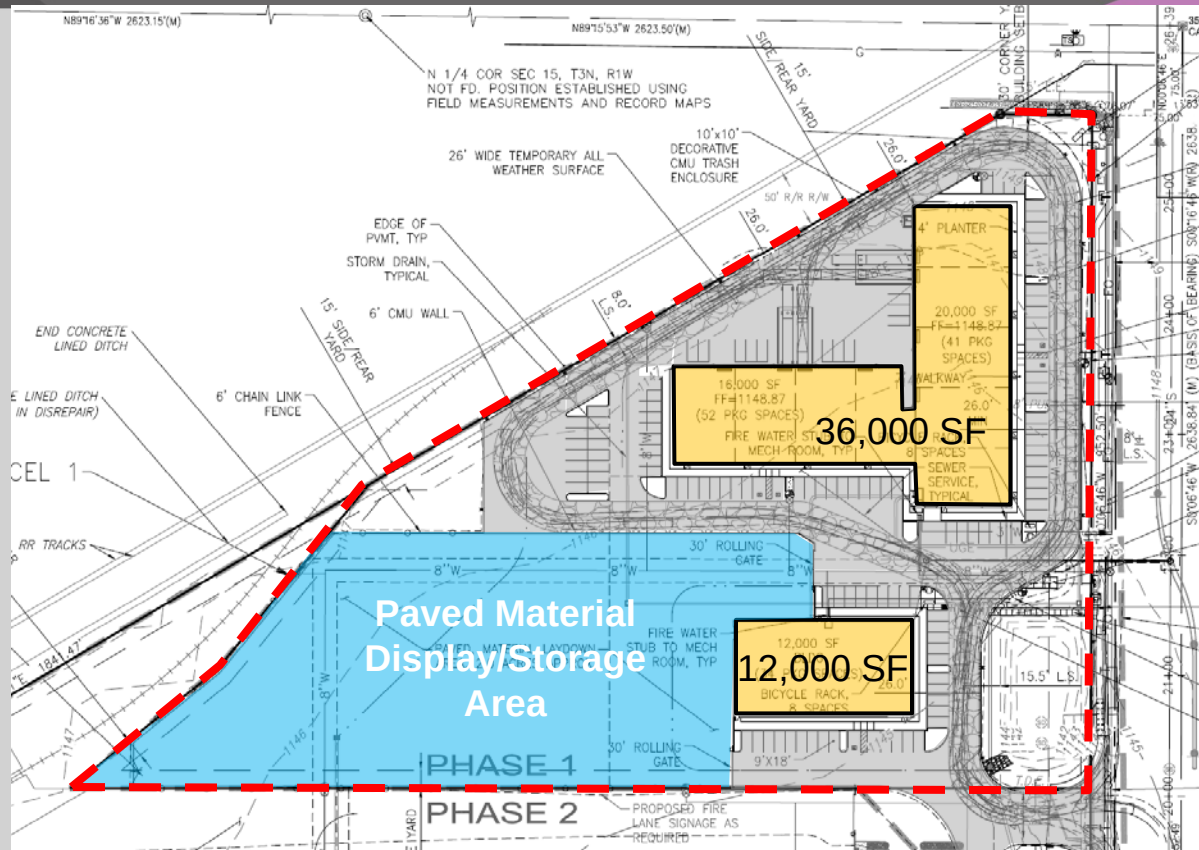


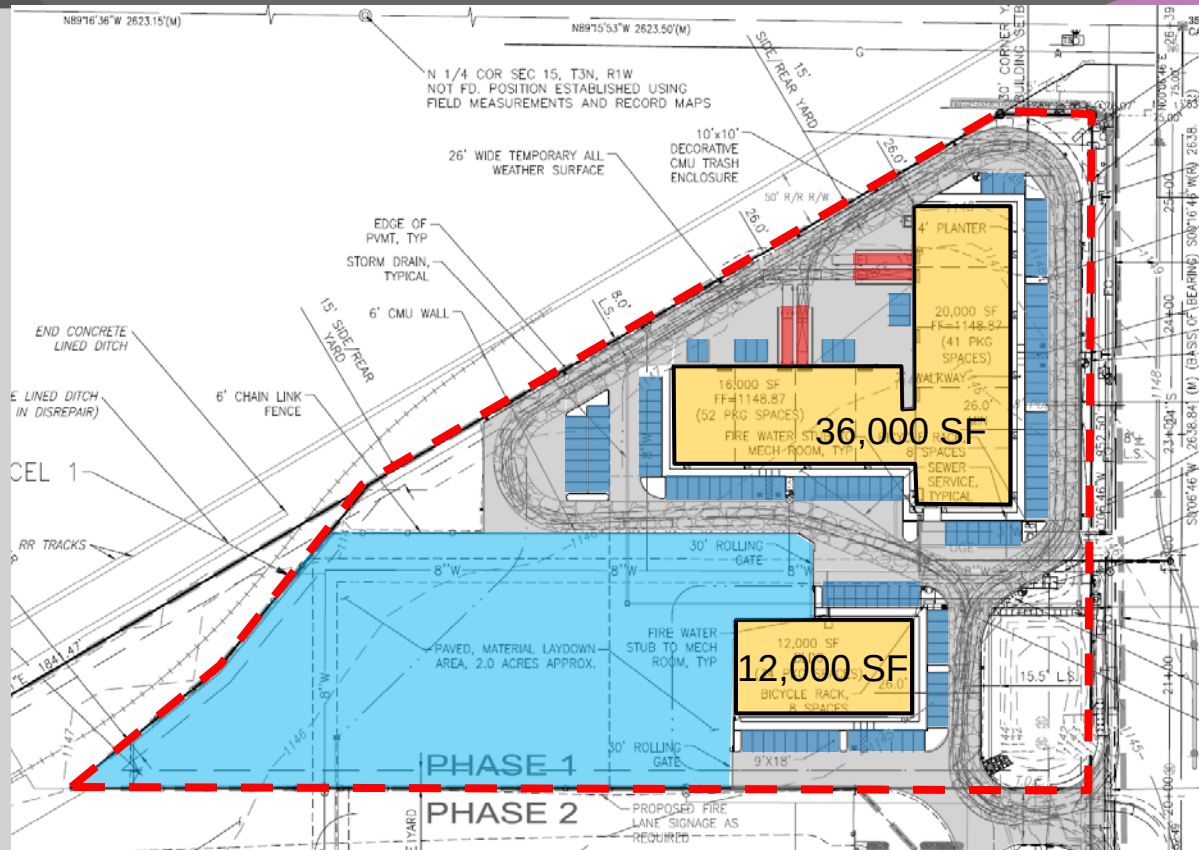
SITE PLAN

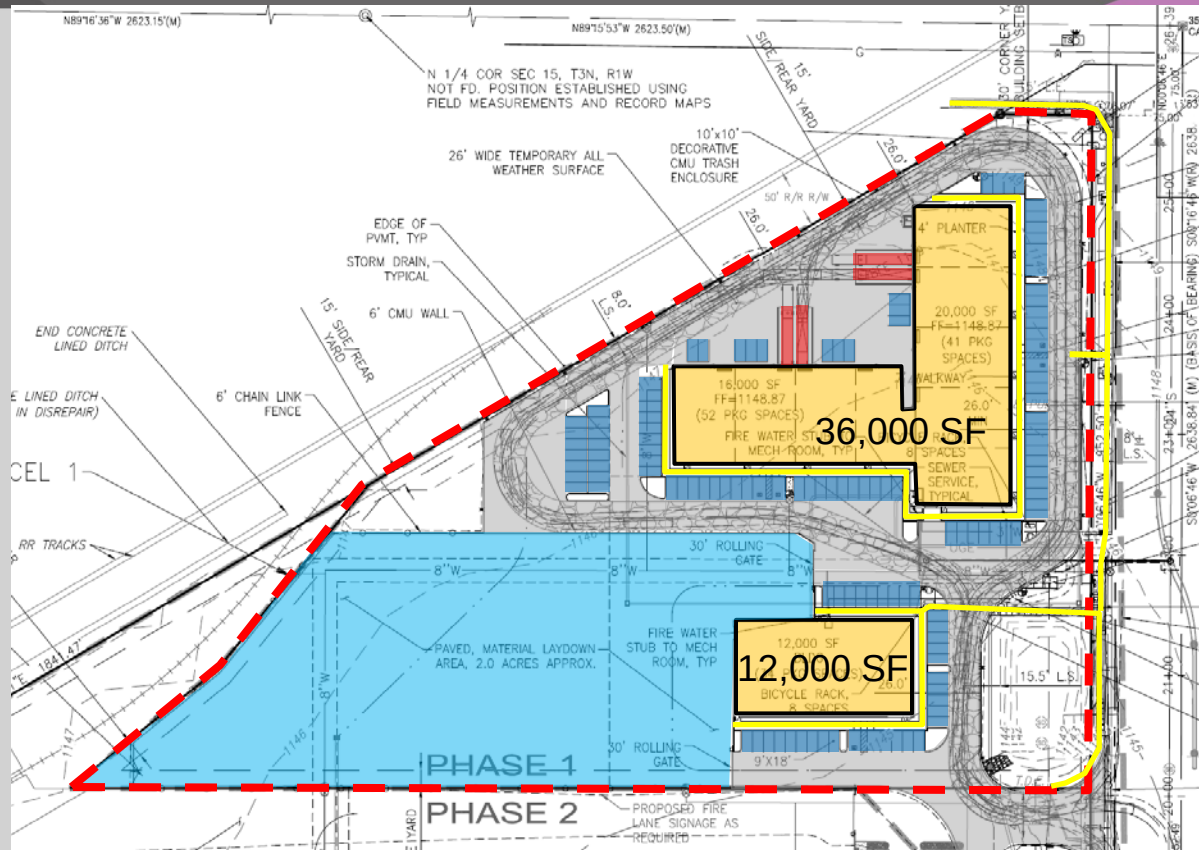






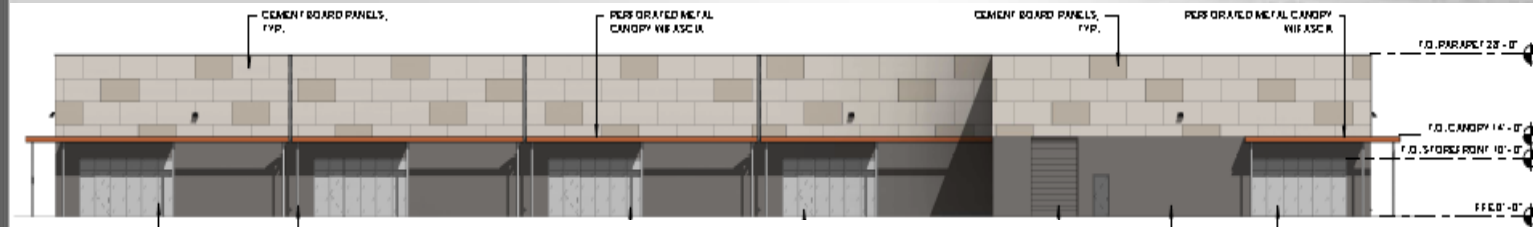








East - Dysart Frontage

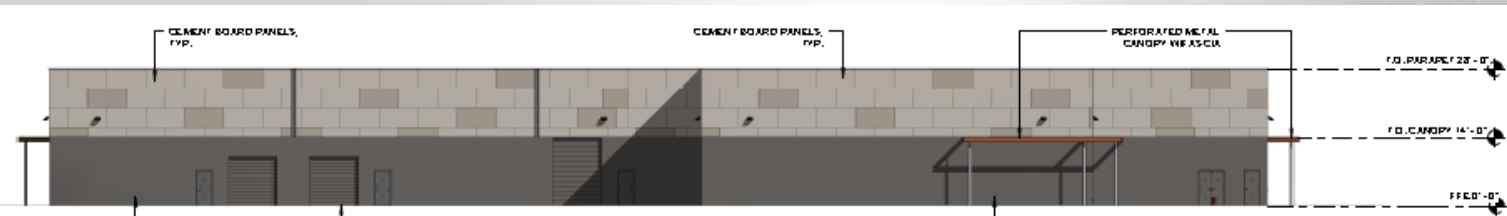


South - Interior of Project

**Flex Space
Elevations**

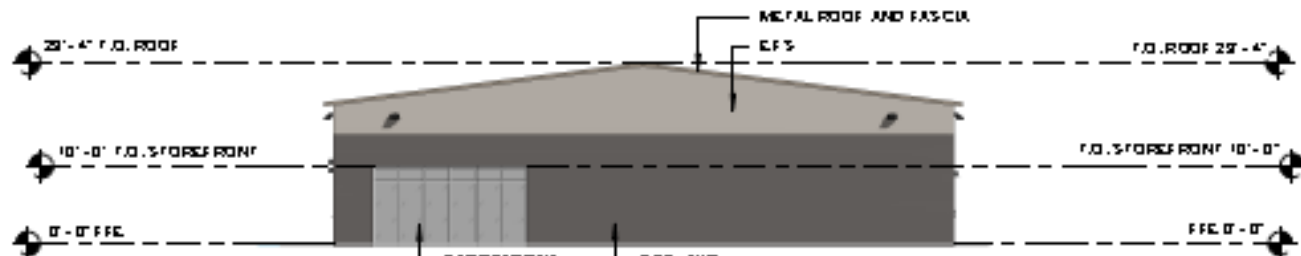


West – Railroad Frontage

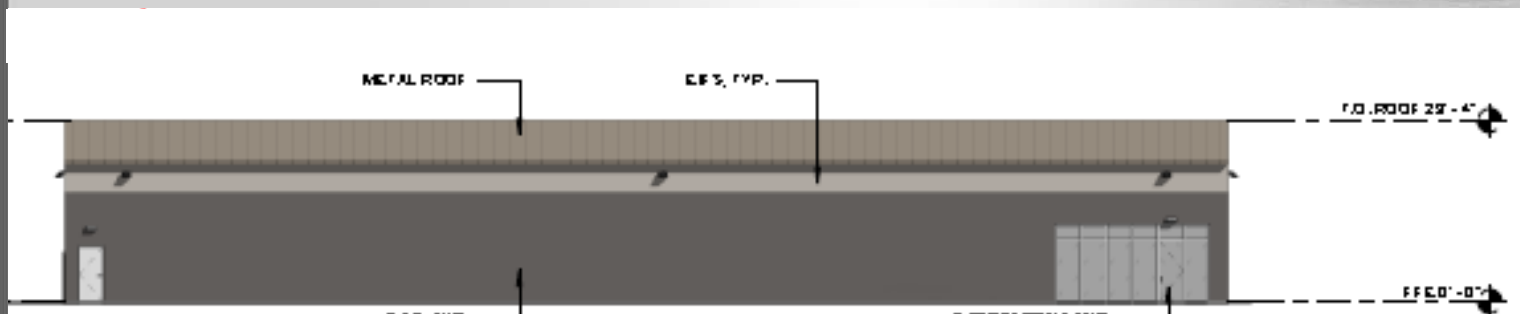


**North – Railroad Frontage /
Waddell Road**

**Flex Space
Elevations**



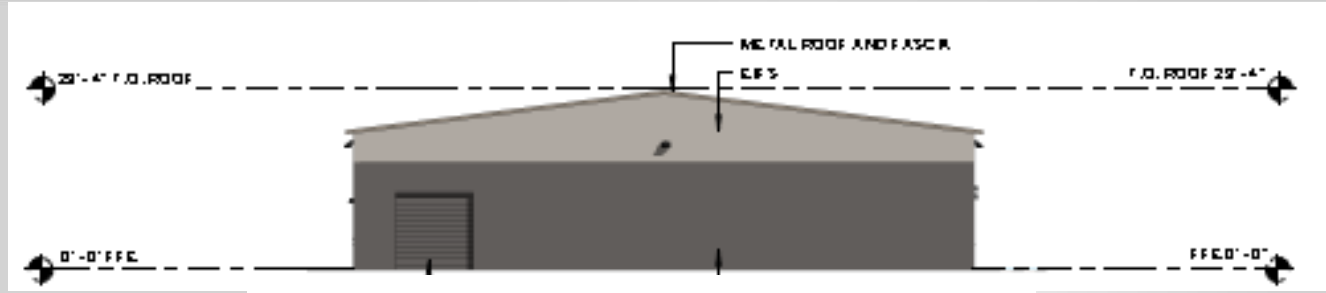
East - Dysart Frontage



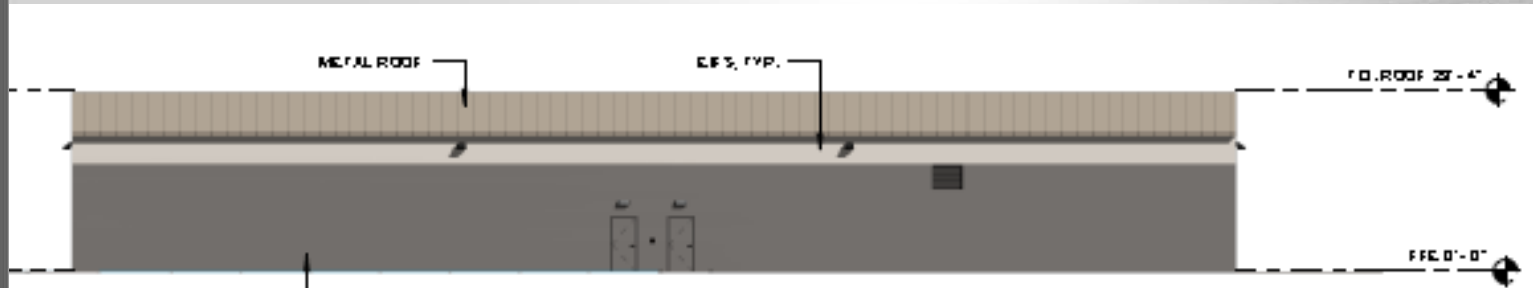
South

Masonry Sales Elevations

Masonry Sales Elevations



North – Interior of Project



West – Towards
Storage / Display

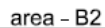
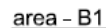


type

[illegible]



scape



Sl#	BOTANICAL / COMMON NAME	H ₂ O / SE / GAL	SEED	QTY.
-----	-------------------------	-----------------------------	------	------

LANDSCAPE MATERIALS	ITEM	CITY
 DECOMPOSED GRANITE (2" DEEP) COLOR MATCH TO 103.2	34" MIN. DE FIELD VERIFY (S/D SPEC CONDITIONS)	36,435 SQ.FT

1000 JOURNAL OF CLIMATE

key map



FS17-585
Hardy World

Recommendation

**Approve, Subject to
Stipulations 'A.' Through 'C.'**



SURPRISE

ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



CITY OF SURPRISE
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

Back Print

Board Meeting Date:	March 1, 2018	Contact Person:	Robert Kuhfuss - Community Development
Submitting Department:	CD Boards and Commissions	District:	3
Staff Recommendations:	Approve		

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

Agenda Wording:

Consideration and action regarding a Zone change from Residential Ranch (RR) to Medium Density Residential 3.65 Dwelling Units per Acre with a PUD Overlay (RM-6 PUD) and Medium Density Residential 4.47 Dwelling Units per Acre with a PUD Overlay (RM-9 PUD) for Rancho TruGold

Motion:

Move to recommend approval to the City Council subject to stipulations “a” and “b” as stated in the Staff Report.

Background:

Mark Reddie of LVA Urban Design Studio, on behalf of Truman Trust seeks approval of a rezone from Residential Ranch (RR) to RM-6 and RM-9 with a Planned Unit Development (PUD) Overlay to allow deviations from the base development standards, and to limit density to 3.65 dwelling units per acre and 4.47 dwelling units per acre, respectively. The subject site involves approximately 63.2 acres of raw land generally located along the Sweetwater Avenue alignment between Cotton Lane and 175th Avenue. The project anticipates up to 252 single-family detached dwellings, for an overall density of 4.0 dwelling units per acre. A separate Preliminary Plat is discussed under separate cover.

Financial Impact Statement:

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

ATTACHMENTS:

Click to download

☐ [00 - Rancho TruGold Rezone, FS17-583, RFLS # 6074 - Staff Report](#)

- ☐ [01 - Rancho TruGold Rezone, FS17-583, RFLS # 6074 - Vicinity Map](#)
- ☐ [02 - Rancho TruGold Rezone, FS17-583, RFLS # 6074 - Case Map](#)
- ☐ [03 - Rancho TruGold Rezone, FS17-583, RFLS # 6074 - Narrative](#)
- ☐ [04 - Rancho TruGold Rezone, FS17-583, RFLS # 6074 - MWD Comments](#)
- ☐ [05 - Rancho TruGold Rezone, FS17-583, RFLS # 6074 - Public Engagement Form](#)
- ☐ [06 - Rancho TruGold Rezone, FS17-583, RFLS # 6074 - Presentation](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

Robert H. Kuhfuss, AICP

ZONE CHANGE

REPORT TO THE PLANNING AND ZONING COMMISSION

Case: FS17-583

Project Name: Rancho TruGold Rezone

Council District: 3

Meeting Date: March 1, 2018

Planner: Robert H. Kuhfuss, AICP

Owner: Truman Trust

Applicant: Mark Reddie of LVA Urban Design Studio on behalf of Truman Trust

Request: Zone Change from Residential Ranch (RR) to Medium Density Residential 3.65 Dwelling Units per Acre with a PUD Overlay (RM-6 PUD) and Medium Density Residential 4.47 Dwelling Units per Acre with a PUD Overlay (RM-9 PUD)

Site Location: Generally located along the Sweetwater Avenue alignment between Cotton Lane and 175th Avenue

Area and Density:

Proposed Zoning District	Lot Yield	Acreage	Gross Density
RM-6 PUD	135	37.0	3.7
RM-9 PUD	117	26.2	4.5
Total	252	63.2	4.0

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

Support/Opposition: None known

Staff Recommendation: **Approve**, subject to stipulations 'a' and 'b'

36 **Introduction:**

37
38 Initially, the applicant sought approval of five (5) separate requests in what was then a county island
39 located in the western portion of Surprise, near Sarah Ann Ranch. Those five requests are listed
40 below:

41
42 Case FS16-391 – 175th & Sweetwater

- 43 • Zone Change from RR to RM-9 PUD
- 44 • Preliminary Plat

45 Case FS16-392 – Magnolia

- 46 • Rezone from RR to RM-6 PUD; from RR to RM-9 PUD; from RH PUD to RM-9 PUD;
47 from RR to RH PUD with Flex Zone; from RR to CR PUD with Flex Zone and from RR
48 to CR PUD.
- 49 • Preliminary Plat

50 Case FS16-427 – Annexation

51
52 The two Zone Change requests and their related Preliminary Plats were presented to the Planning
53 and Zoning Commission, who made a favorable recommendation to the City Council. The City
54 Council approved the annexation on January 17, 2017, but continued the two Zone Change
55 requests and two Preliminary Plats to a date-certain of February 7, 2017 at the applicant's request.
56 During the February 7, 2017 City Council meeting, the applicant informed the Council that due to
57 contractual issues, the collective of projects could not move forward at that time. The Council then
58 remanded two Zone Change requests and two Preliminary Plats back to the Planning and Zoning
59 Commission until such time as the development plans could be revised. Since that time, the various
60 owners of the previous land assemblage have been working to bring forth revised submittals
61 independently. The subject case is one of those revised submittals. A related Preliminary Plat, also
62 submitted under this case number, is discussed under separate cover.

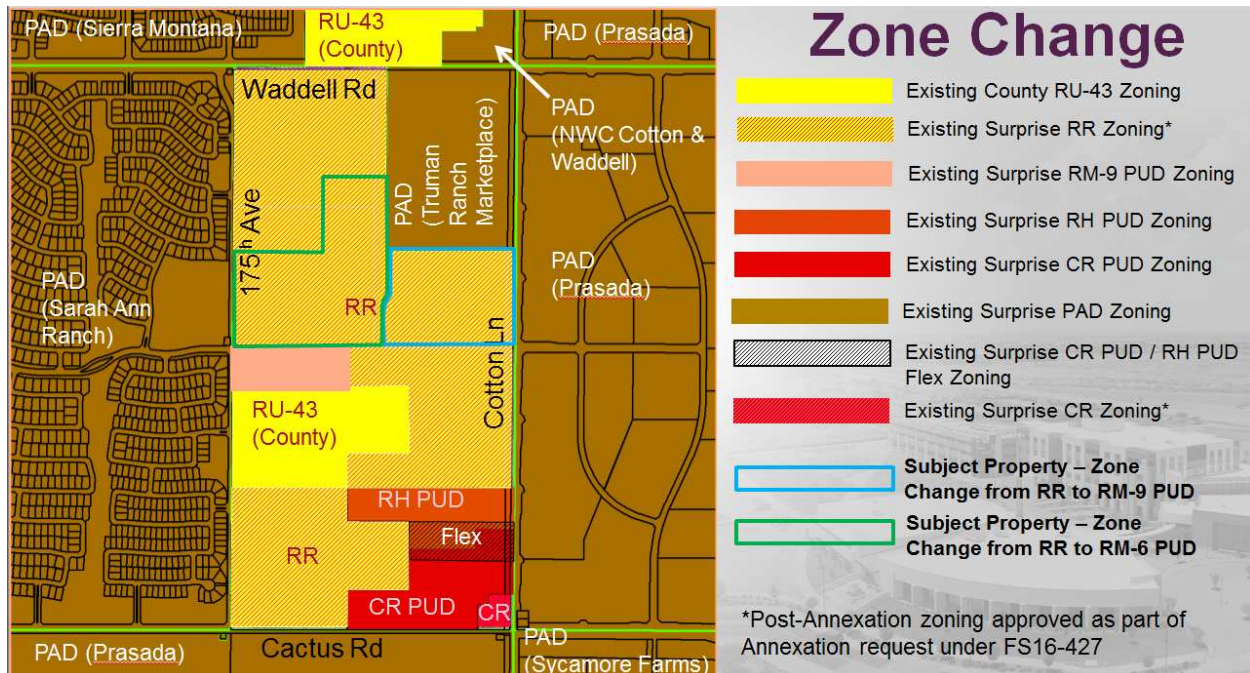
63
64 **Project Description:**

65
66 The subject request involves the rezoning of approximately 26.2 acres of recently incorporated land
67 from Residential Ranch (RR) to RM-9 PUD, and approximately 37.0 acres of recently incorporated
68 land from Residential Ranch (RR) to RM-6 PUD. Both districts include a PUD Overlay to allow
69 modifications from the base development. These modifications relate to minimum lot width and
70 minimum lot area, deletion of the community pool requirement, the configuration of perimeter
71 landscaping, the reduction of turf area associated with a recreational field, as well as the area and
72 width of residential driveways. The respective PUD Overlays will also cap the RM-9 portion to 4.47
73 Dwelling Units per Acre as opposed to 9 Dwelling Units per Acre, and 3.65 Dwelling Units per Acre
74 for the RM-6 portion as opposed to 6 Dwelling Units per Acre.

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77 [Continued following page.]
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79

Existing Zoning:

The following map and associated chart depict the existing zoning of the subject site and its surrounds.



PAD (Sarah Ann Ranch)	Residential Ranch (RR) and PAD (Truman Ranch Marketplace)	Residential Ranch (RR)
PAD (Sarah Ann Ranch)	Residential Ranch (RR)	PAD (Prasada)
PAD (Sarah Ann Ranch)	RM-9 PUD and Residential Ranch (RR)	PAD (Prasada)

Background:

April 21, 2016: Staff discussed a proposal involving the subject property during a regularly scheduled Concept Review meeting under CR16-171.

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, 2016: The applicant held a neighborhood outreach meeting to discuss the larger Magnolia project.

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

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 15, 2016: The Commission continued FS16-391 to a date-certain of January 5, 2017 due to an advertising error.

January 5, 2017: The Planning and Zoning Commission recommended approval of the zone change requested under FS16-391 subject to staff-recommended stipulation “a” through “c”.

January 17, 2017: The City Council approved the annexation of the subject property under case FS16-427.

January 17, 2017: The City Council continued FS16-391 and FS16-392, a companion case, to a date-certain of February 7, 2017 at the applicant’s request.

February 7, 2017: The City Council remanded FS16-391 and FS16-392, to the Planning and Zoning Commission at the request of the applicant.

July 6, 2017: Staff met with the applicant to discuss the subject project during a regularly scheduled Concept Review meeting under CR17-312.

October 3, 2017: The applicant submitted a request for a Zone Change and Preliminary Plat under case FS17-583, the subject case.

October 3, 2017: The City Council approved a Zone Change for 175th and Sweetwater under case FS16-391.

November 13, 2017: The applicant held a neighborhood outreach meeting to discuss the subject request.

December 19, 2017: The City Council approved a Preliminary Plat for 175th and Sweetwater under case FS17-403.

February 1, 2018: The Commission recommended approval of the Heritage Farm Zone Change and Preliminary Plat to the City Council.

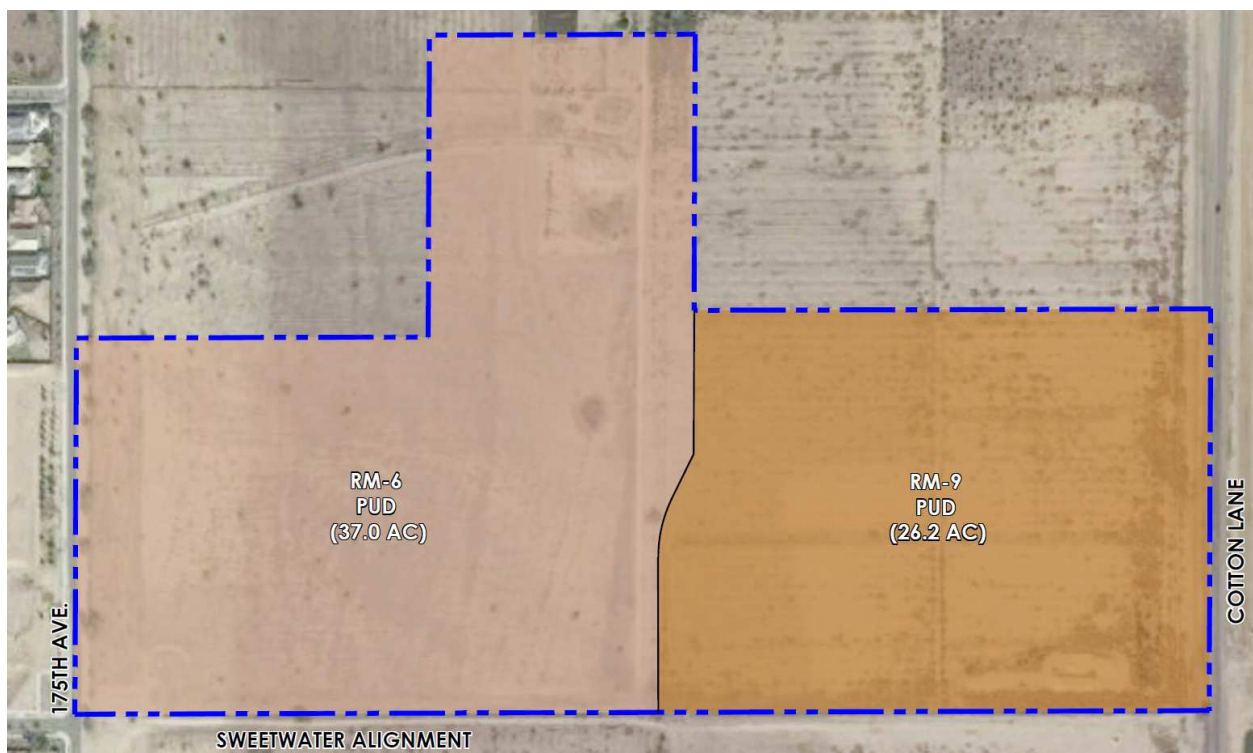
March 6, 2018: The City Council is scheduled to hear the Heritage Farm Zone Change and Preliminary Plat.

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. The applicant held a second outreach meeting on November 13, 2017, which was also well attended. The applicant received one (1) written comment relating to the need for street improvements in the area. No revisions to the proposed development plan were necessitated as a result of any feedback received.

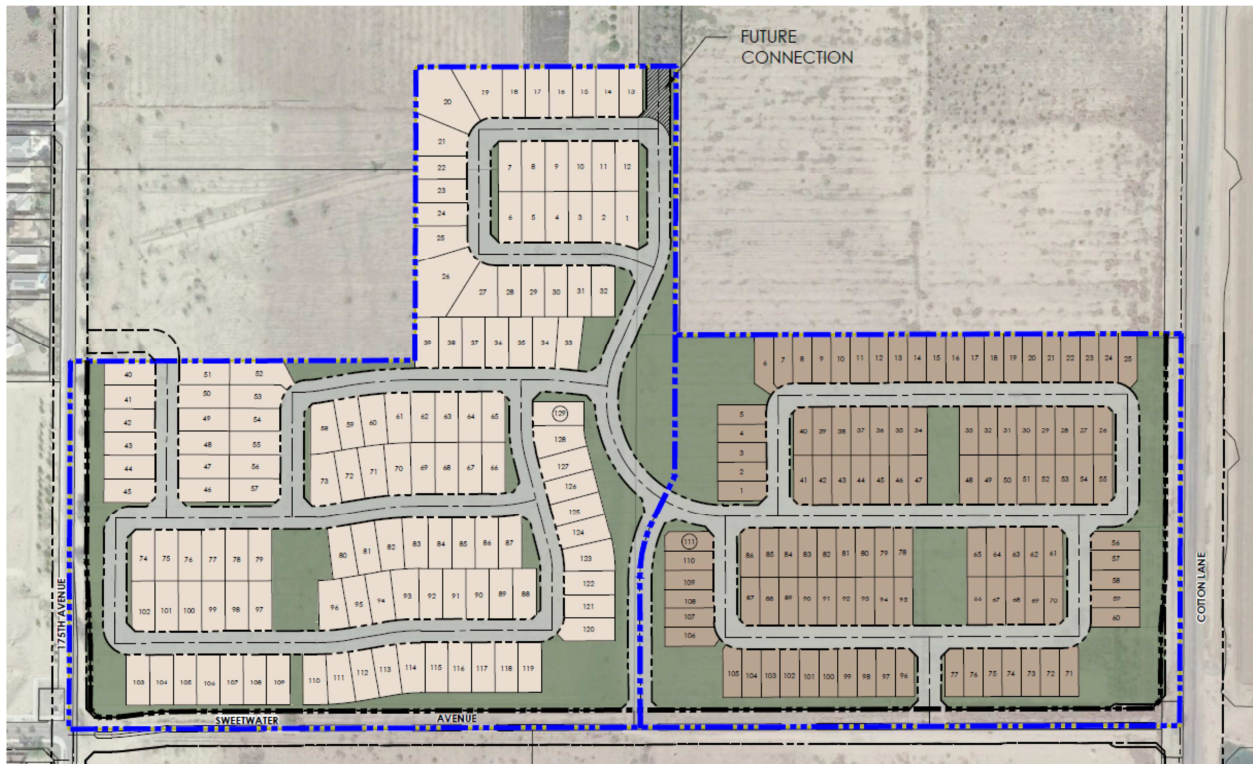
Analysis and Discussion:

The subject zone change request contemplates a change from RR to two (2) separate zoning districts, RM-6 and RM-9, each with a PUD Overlay. The following image, taken from Figure 2 of the zoning narrative, shows the proposed zoning district boundaries:



The base zoning of the western 37.0 acres will be RM-6, which would allow up to 6 Dwelling Units per Acre (DU/Ac); however, through the PUD Overlay, the developer proposes not more than 135 dwelling units for a gross density of approximately 3.65 DU/Ac. Similarly, the base zoning of the eastern 26.2 acres will be RM-9, which would allow up to 9 DU/Ac; however, the PUD Overlay also caps the lot yield to 117 lots for a density of 4.47 DU/Ac.

The following image, taken from Figure 3 of the zoning 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.



Unlike typical “PAD” zoning, the subject request falls under the current SUDC. As such, the uses associated with the proposed zoning district are per Section 122-43 of the SUDC. The proposed PUD Overlays, however, will allow certain modifications to 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.

[Continued following page.]

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

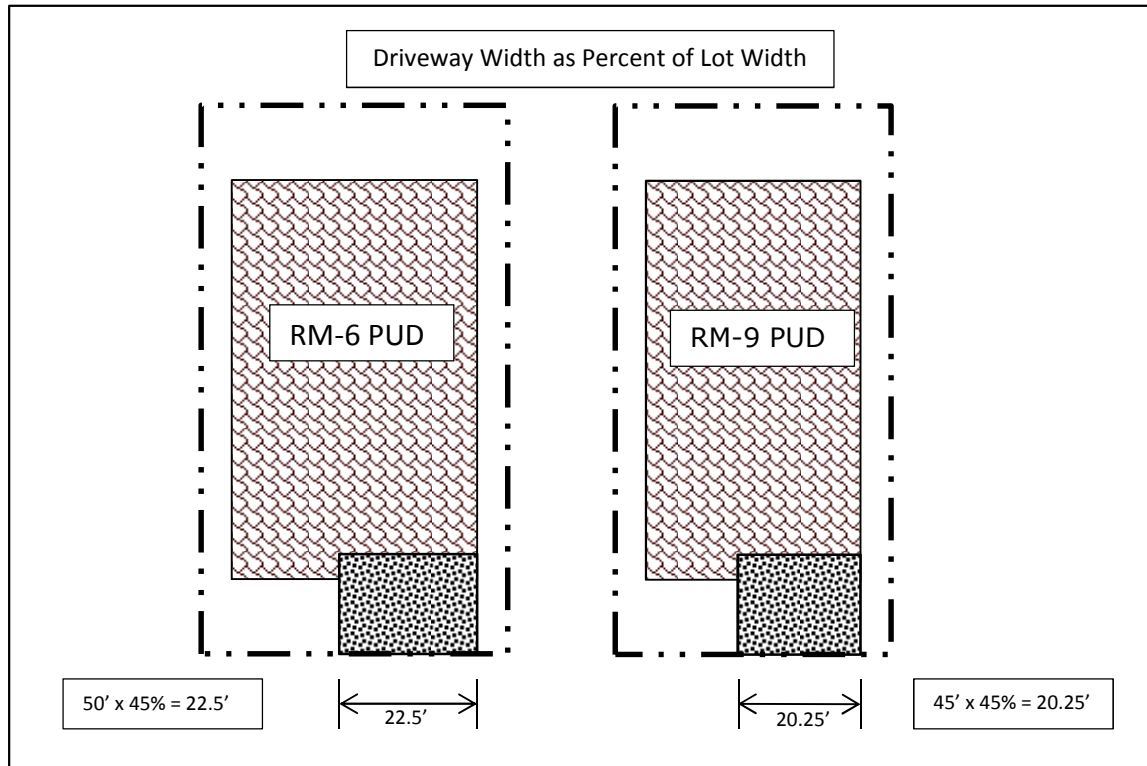
Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Density	6.0	5.0 (decrease in density)	9.0	5.0 (decrease in density)
Minimum Lot Area (sf) (1)	6,000	6,000	4,500	5,000 (increase in lot size)
Minimum Lot Width (ft)	50	50	40	45 (increase in lot width)
Minimum Lot Depth (ft)	100	100	100	100
Minimum Front Yard Setback (ft) (livable area/front-facing garage)	12/20	12/20	12/20	12/20
Minimum Side Yard Setback (ft)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft)	20	20	20	20
Maximum Building Height (ft)	35	35	35	35

As noted in the narrative, Section 122-137(r) of the SUDC requires a community swimming pool for Medium Density Residential projects of 60 or more units. The applicant proposes the deletion of this requirement through the PUD Overlay. The rationale being that as a single-family development with 20' rear setbacks, ample space will be available on each lot to accommodate a private pool should that homeowner chose to do so. Staff does not object to the deletion of the pool requirement.

The applicant also proposes altering the perimeter open space configuration from that required by the SUDC. Section 122-137(e)(1)a requires an open space tract of not less than 60' in width adjacent to arterials and parkways. The applicant proposes an average width of 60', which is borne out in the associated Preliminary Plat. The applicant further proposes the deletion of the requirement to orient perimeter houses along a single-loaded street. Staff does not object to either of these provisions.

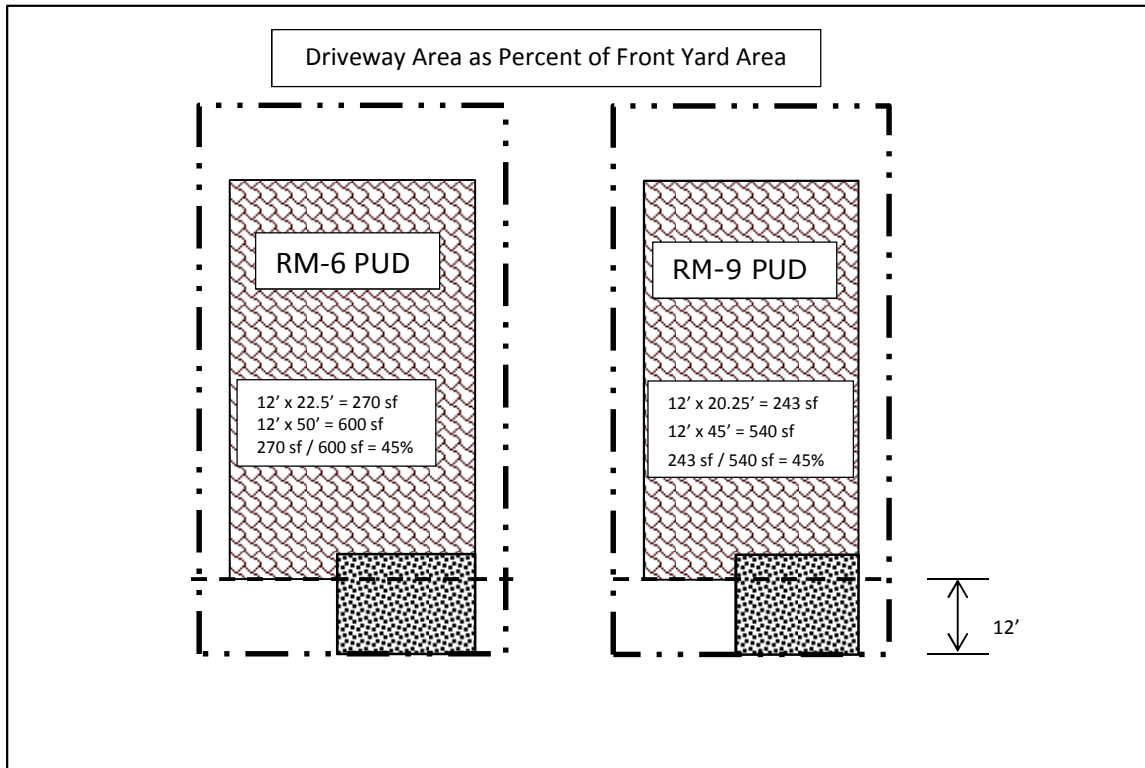
Section 122-137(p)(1) requires one (1) turf recreational field per 700 residential units, each field to have a minimum turf area of not less than 3.5 acres. The applicant proposes the removal of the 3.5 acre minimum size requirement, based on the proportional size of the field relative to the proposed development. Staff does not object to the removal of the 3.5 acre requirement.

Also, there is a provision in the current SUDC which limits the width of a residential driveway to 30% of the lot's width. The proposed minimum lot width is 50' for the RM-6 portion and 45' for the RM-9 portion. If limited to 30%, the driveways would only be 15' and 13.6' wide, respectively. Since a typical garage is 20' wide, increasing the allowable driveway width from 30% to some higher number make sense. The applicant proposes 45%, which would allow for a 22.5' wide driveway in the RM-6 portion, and 20.25' in the RM-9 portion.



There is also a provision in the current SUDC which limits the area of a residential driveway to 30% of the required front yard area, which is that area located between the front setback line and the front lot line. Again, the proposed minimum lot widths are 50' and 45', while the proposed minimum front setback is 12'. 30% of the resulting area will not accommodate a driveway; however, increasing to 45% will accommodate the proposed driveway widths.

[Continued following page.]



254
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256 The SUDC requires that not less than 20% of the “net residential acreage” be set aside as open
 257 space. The net residential acreage is essentially the total amount of land taken up by the individual
 258 lots combined with the total open space. The applicant proposes an increase to 24% of the net
 259 residential area as open space overall, which exceeds the 20% requirement set forth in the SUDC.
 260 Within that open space will be a pocket park with tot-lot, ramada, picnic area, turf play area, and
 261 landscaping.

262

263 **Utility and Services Table:**

264

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

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271 **Conformance with Adopted Plans:**

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273 **Surprise General Plan 2035:** The Surprise General Plan 2035 shows the subject property as lying
274 within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac
275 or more, provided appropriate transitions are made between the various Neighborhood types
276 included within the character area. The subject proposal contemplates up to 252 dwelling units,
277 which equates to 4.0 DU/Ac overall. As such the proposed zoning most closely aligns with the
278 Suburban Neighborhood type and is consistent with the General Plan.

279
280 **Reviewing Agencies:**

281
282 **Luke Air Force Base (LAFB):** In a letter dated October 12, 2017, LAFB indicated the proposed
283 development met their Graduated Density Concept and would not interfere with flight operations,
284 but requested a robust notification program.

285
286 **Arizona Department of Transportation (ADOT):** In an email dated October 4, 2017, ADOT
287 indicated no concerns.

288
289 **Maricopa Water District (MWD):** In an email dated October 4, 2017 (attached), MWD indicated
290 the proposed development would impact their facilities. Stipulations to address these concerns are
291 included in the associated Preliminary Plat approval, discussed under separate cover.

292
293 **Summary:**

294
295 The applicant seeks a Zone Change over the subject property, and seeks relief from certain aspects
296 of the SUDC through the PUD Overlay. Said Zone Change is consistent with the Surprise General
297 Plan and the rationale for the granting of the PUD Overlay stems from the developer's commitment
298 to provide not less than 24% open space, which exceeds the minimum requirement of 20%. The
299 proposed development is compatible with the neighboring land uses and the amenities included
300 within the open space will provide recreational opportunities for the neighborhood residents.
301 Further, much needed infrastructure will be constructed as part of this development.

302
303 **Findings:**

- 304
305
 - The proposed zone change is consistent with the Surprise General Plan 2035.
 - The proposed development standards will allow the property to be reasonably developed.
 - There are no objections to the request.

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Recommendation:

Based on the findings noted above, staff recommends the Commission move to recommend **approval** of the subject rezone request to the City Council, subject to stipulations 'a' and 'b' as outlined below:

- a. Development and use of the site shall be in conformance with the project narrative entitled "Rancho TruGold", prepared by LVA Urban Design Studio, dated revised December, 2017 and stamped received December 21, 2018, except as modified by the following stipulations.
- b. 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.

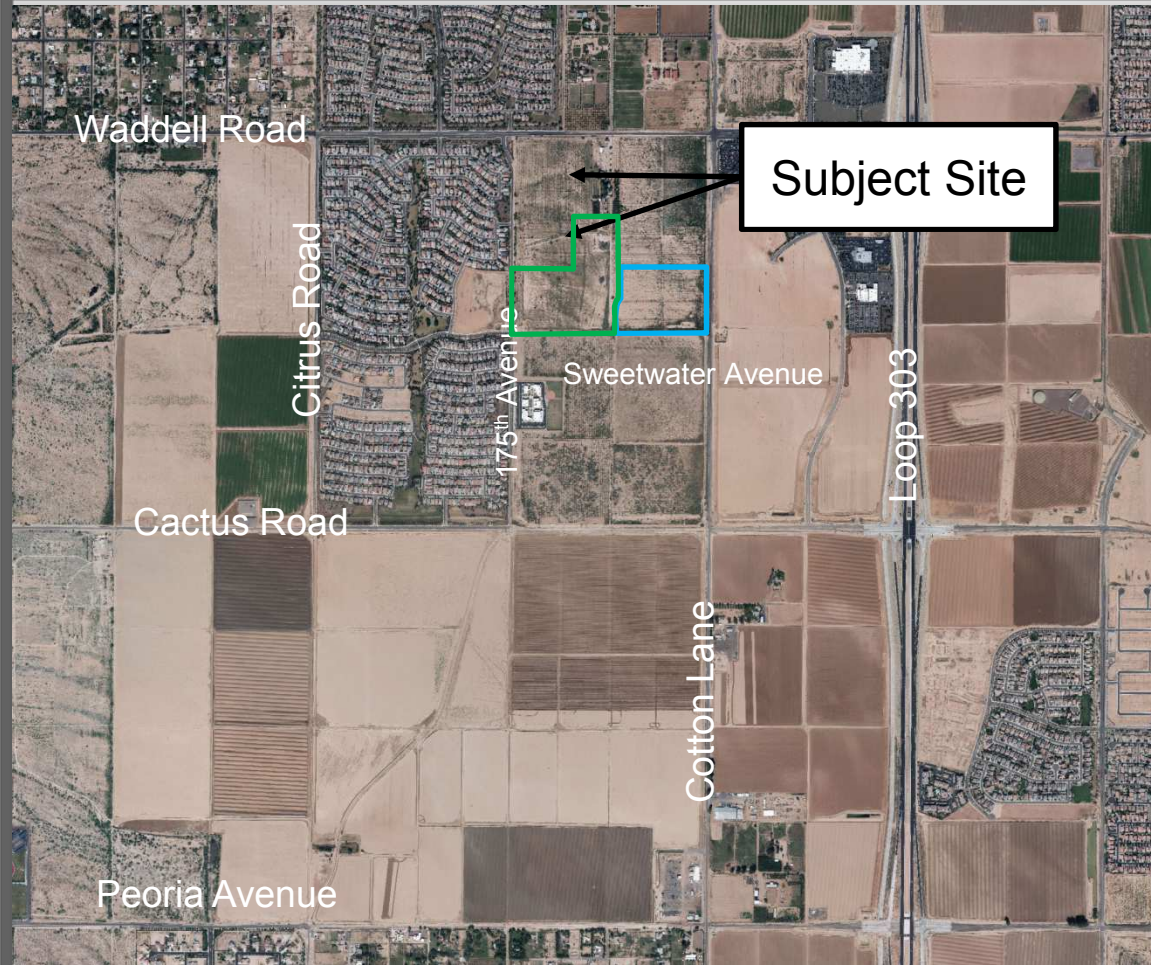
However, should the Commission wish to recommend denial of the request, the Commission should make its own findings and base its decision on those alternative findings.

Attachments:

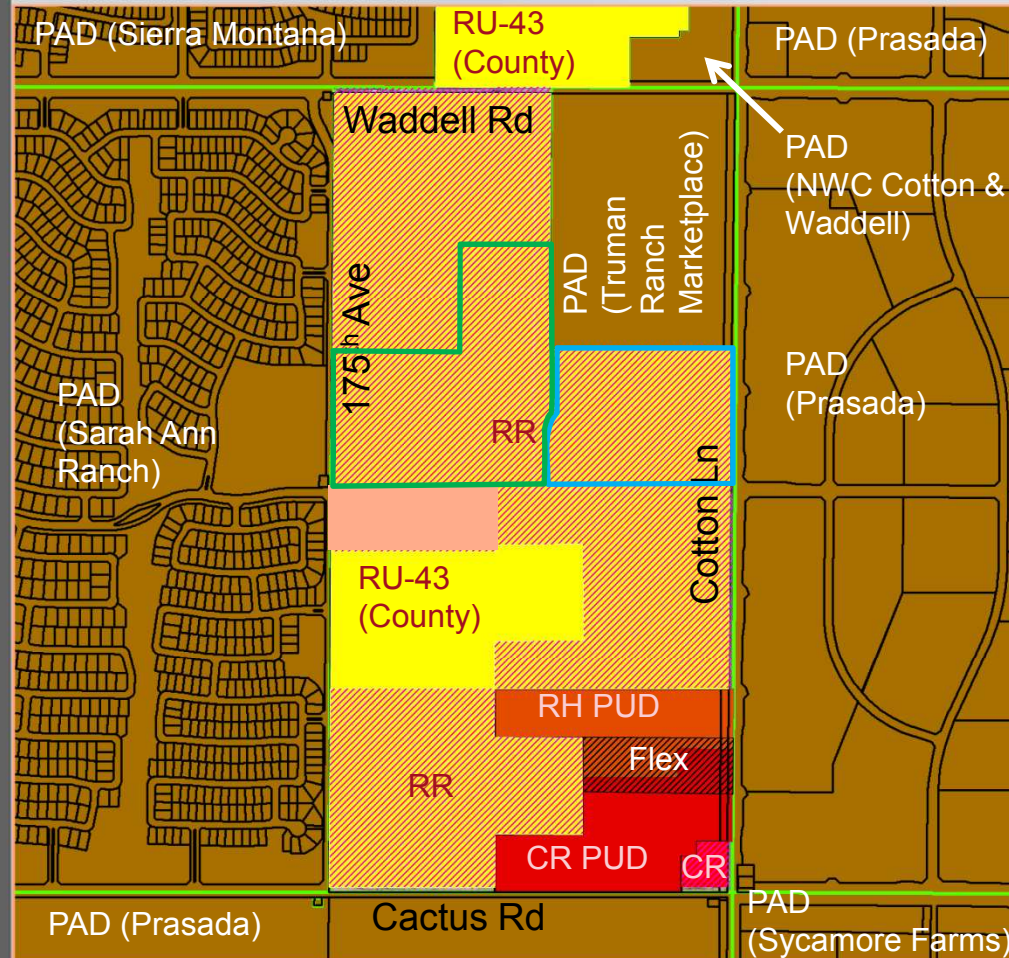
- 01 Vicinity Map
- 02 Case Map
- 03 Project Narrative
- 04 MWD comments

Heritage Farm

Vicinity Map



Zone Change



- Existing County RU-43 Zoning
- Existing Surprise RR Zoning*
- Existing Surprise RM-9 PUD Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise PAD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning
- Existing Surprise CR Zoning*
- Subject Property – Zone Change from RR to RM-9 PUD**
- Subject Property – Zone Change from RR to RM-6 PUD**

*Post-Annexation zoning approved as part of Annexation request under FS16-427

RANCHO TRUGOLD

A RESIDENTIAL DEVELOPMENT
SURPRISE, ARIZONA

PUD ZONING APPLICATION
OCTOBER 2017

REVISED DECEMBER 2017

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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 John C. & Helen G. Truman Trust, UAD 11/2/1978, LVA Urban Design Studio, LLC is requesting a zone change from Residential Ranch (RR) to 37 acres of RM-6 PUD and 26.2 acres of RM-9 PUD for a 63.2-acre parcel of land located at the northwest corner of Cotton Lane and Sweetwater Avenue, called Rancho TruGold. The site is an irregular-shaped parcel located ½ mile west of the Loop 303 freeway, and is bounded by the Sweetwater Avenue to the south, Cotton Lane to the east, vacant land and a rural residential lot 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 Survey* for the legal boundaries of the property. The applicant will also be submitting a preliminary plat for the property concurrent with the zone change request.

1.2 Project Overview and Zoning Request

Rancho TruGold will be developed as a single-family residential development within an active growth area of the City of Surprise. The residential zoning for the property is RM-6 PUD for the western 37 acres of the site and RM-9 PUD for the eastern 26.2 acres of the site, using the Conventional Character Pattern. See **Figure 2**, *Proposed Zoning Map* for the location of the zoning district boundary.

Rancho TruGold will include up to 252 residential units which translates to a maximum gross density of 4.0 dwelling units per acre for the project as a whole. This is consistent and at the lower end of the 2-8 dwelling units per acre density range permitted within the Neighborhood General Plan Land Use designation. The RM-6 PUD district shall permit a maximum of 135 units or 3.65 du/ac, and the RM-9 PUD shall permit a maximum of 117 units or 4.47 du/ac. While actual unit count and lot sizes may vary slightly with the final development plan, the concept plan includes 45' x 115' within the RM-9 PUD district and 55' x 120' within the RM-6 PUD district.

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 be subsequently amended. The Planned Unit Development (PUD) overlay designation shall be applied to the property to allow modification of certain development standards within the Surprise Zoning Code.

1.3.a, Community Pool: The first modification is the removal of the requirement for a community pool per **Section 122-137(r)** of the Surprise Unified Development Code (SUDC) which states:

“Medium density residential projects containing 60 residential units or greater shall be provided a swimming pool amenity, unless there is a community pool included as part of the overall development.”

The justification for removal of this requirement is that proposed lot sizes will be large enough to accommodate pools within individual lots. The community pool standard is intended for small lot medium density residential product with lot sizes that cannot accommodate private pools within individual yards. This development will provide lot sizes large enough to accommodate pools within individual rear yards based on the

proposed lot sizes and associated development standards defined within Table 1. See additional mitigation for this and other modified standards later in this section.

1.3.b, Roadway Buffer: The second modification is to the roadway buffer standards within **Section 122-137(e)(1).a.1** of the SUDC which states:

“Residential units shall be situated to face the required 60-foot landscape tract upon a single-loaded local street. The minimum distance between the fronting residential lots and the arterial road right-of-way shall be 110 feet.”

This subsection shall be removed in its entirety. Cotton Lane is a major arterial road which will have significant traffic serving regional commercial uses directly across the street. This standard does not create a cohesive neighborhood or community design for a residential development, and is generally a flawed standard in this suburban context, particularly because the land use directly across the street is planned for regional commercial uses.

1.3.c, Recreational Field: The third modification is to the recreational fields standard within **Section 122-137(p)(1)** of the SUDC which states:

“There shall be a minimum of one turf recreational field provided by the developer for organized sporting activity in a low density or medium density residential project. In no case shall there be less than one turf recreational field per 700 units within a development. Any required recreational field shall have a minimum turf area of 3.5 acres.”

The modified standard for Section 122-137(p)(1) shall include removal of the last sentence that states: *“...Any required recreational field shall have a minimum turf area of 3.5 acres.”* Based on the size and scale of this development at only 63 gross acres, a 3.5 acre turf field (which is roughly the size of three full-size professional football fields side by side) is out of scale and inappropriate for this development. While the overall project will exceed the open space requirement, the recreational field provided will be scaled appropriate for the development as shown on **Figure 4, Open Space and Amenities Plan**. Additional mitigation regarding the overall open space plan is provided further below.

1.3.d, Driveway Width: The final modification is for driveway width standards within **Section 122-121(h)(3)c and d** of the SUDC which states:

“c. Driveways and other parking shall not comprise more than 30 percent of the front yard lot area of a detached single family home; nor 50 percent of the front yard lot area of a two or more family residential unit. Circular driveways and similar circulation shall be permitted within the front yard so long as no long term resident parking occupies such circular drive, and the square footage for driveway, parking and other impervious surfaces combined does not exceed the allowable percentages shown herein.

d. Driveway entrances shall not comprise more than 30 percent of the front lot line of a single family, detached residential parcel, nor more than 50

percent of the front lot line of any multiple-family or non-residential parcel.”

Rancho TruGold includes 45’ wide and 55’ wide lots, which is the market demand in this area. In order to accommodate a two car garage and a 20’ wide driveway, this standard will be modified to state: “c. *Driveways and other parking shall not comprise more than 45 percent of the front yard lot area of a detached single family home.*” and “d. *Driveway entrances shall not comprise more than 45 percent of the front lot line of a single family, detached residential parcel.*” This revised standard will allow all homes within the subdivision to accommodate a two car garage and an appropriate width driveway.

Mitigation: As appropriate mitigation for the above modified development standards, the project will include reduced density limits, increased lot sizes, and increased common-area open space for the benefit of the residents and surrounding community. Detailed regarding the proposed mitigation to these modified development standards are discussed further below. 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 western 37.0 acres of the property will be zoned RM-6 PUD, while the eastern 26.2 acres of the property will be zoned RM-9 PUD. As stated above, the purpose of the PUD overlay is to modify certain development standard. As mitigation and additional justification for these modified development standards, the maximum allowable density for the project will be reduced from 6.0 to 5.0 dwelling unit per acre for RM-6 PUD and from 9.0 to 5.0 dwelling units per acre for RM-9 PUD. Additionally, within the RM-9 PUD district, the project will increase the minimum lot size from 4,500 square feet to 5,000 square feet, and increase the minimum lot width from 40’ to 45’. These increased development standards will ensure a lot size that is larger than the base district requirements for RM-9, and can accommodate backyard pools to mitigation the removal of the community pool requirement. It also requires an increased lot width to mitigate the wider driveway percentage while still providing for livable areas of each home to face the street. These increased bulk development standards are defined within **Table 1, RM-6 PUD and RM-9 PUD Development Standards** below. Note that items in “red” on Table 1 are standards that have been modified as defined above.

As additional mitigation for the use of the PUD overlay, the development will provide for an increase in the required open space from 20% net residential area to 24% net residential area, which represents a 20% increase in required open space. This includes a large, central community open space area, a 40’ wide landscape setback along 175th Avenue, and a larger overall landscape tract along Cotton Lane, including additional depth at the intersection of Cotton Lane and Sweetwater Avenue to create more openness at the primary entry to the community. Additional open space is provided within open space tracts throughout the development to accommodate multiple locations for active and passive recreation, landscaping and areas needed for retention within the development.

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 Density	6.0	5.0 (decrease in density)	9.0	5.0 (decrease in density)
Minimum Lot Area (sf) (1)	6,000	6,000	4,500	5,000 (increase in lot size)
Minimum Lot Width (ft)	50	50	40	45 (increase in lot width)
Minimum Lot Depth (ft)	100	100	100	100
Minimum Front Yard Setback (ft) (livable area/front-facing garage)	12/20	12/20	12/20	12/20
Minimum Side Yard Setback (ft)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft)	20	20	20	20
Maximum Building Height (ft)	35	35	35	35

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 general location and size of open spaces. The development plan concept identifies two lot sizes, including 55' x 120' for the western portion of the development, and 45' x 115' for the eastern portion of the development. A large, common open space amenity is provided within the central portion of the development, and is strategically located to provide high visibility and access for all residents. The primary entry into the development terminates at this park, creating an attractive visual experience for residents and visitors as they enter the community. Two additional recreational open space areas are provided within each of the development parcels, providing further opportunities for residents to recreate within close proximity of their homes.

Access to the community will be provided from Sweetwater Avenue and 175th Avenue, with a future roadway connection planned to the north. Internal circulation includes a series of looped streets, providing various choices for residents while minimizing potential for cut-through traffic from surrounding developments. Perimeter setbacks include a wide, 40' landscape setback on 175th Avenue, a minimum 15' landscape setback along Sweetwater (which increases at the primary entry and at the corners), and a 60' landscape setback along Cotton lane. Additionally, the subdivision has been design to provide variety along the street frontage so there are no long stretches of perimeter walls along the street.

1.5 Circulation Plan

The site is bounded by 175th Avenue to the west, Sweetwater Avenue to the south, and Cotton Lane to the east. 175th Avenue and Sweetwater Avenue are both classified as Residential Collector streets with a 40' half street right-of-way. Cotton Lane is designated as a major arterial street with a 68' half street.

Primary access to the property will be from Sweetwater Avenue, with a looped local street system connecting on the central and east sides of the property. Sweetwater Avenue will ultimately be constructed from 175th Avenue to Cotton Lane, providing access from both Cotton Lane and 175th Avenue to the property. An additional access point is planned at 175th immediately north of the property. The applicant is coordinating with the property owner to the north to ensure this access location is provided with the first development project to be constructed. As an alternative, a temporary cul-de-sac can be provided until the roadway connection to the north is made. A future local roadway connection is also planned to connect to the property at the north end, providing for additional connectivity when the northern property is developed. The right-of-way for this connection will be dedicated with the plat for this development, but improvements will be provided by the adjacent property owner when the north property is developed.

A Traffic Impact Analysis 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 connection to the central open space amenity.

1.6 Open Space, Trails and Amenities Plan

The community will provide perimeter and internal open spaces, a central community amenity area and setback sidewalks that will encourage walking and pedestrian connectivity within the development and adjacent surrounding community. A 40' wide perimeter setback will be provided along 175th Avenue and will include landscaping, retention and community signage. A 15' landscape setback is provided along Sweetwater Avenue, with wider open spaces at the corners and within the central entry to the development, creating an attractive entry experience as residents and visitors enter the community. This will also be a location for community monument signs. A 60' wide landscape setback from back of curb will be provided on Cotton Lane, with a much wider open space feature at the intersection of Cotton Lane and Sweetwater, providing an attractive buffer between the lots and the street, and an area to provide a community entry monument.

A central neighborhood park will include active and passive recreational amenities such as a tot lot, sports court, shaded seating, picnic areas, informal play field, trails, retention areas and landscaping to serve the residents within the development. This has been located at the termination of the primary entry into the community, and is centrally located to provide excellent access and visibility for all residents. Two additional recreational open spaces are provided within the eastern and western portions of the development, providing secondary active and passive recreational amenities for residents. Overall, the property will provide a minimum of 24% net residential acreage open space, a 20% increase in open space requirements per **Section 122-137(d)(2)**, Conventional Character Pattern of the City's Zoning Code. See **Figure 4, Open Space and Amenities Plan** for the conceptual design and location of all open spaces.

1.7 Landscape Theme and Community Character

The overall landscape theme will use elegant and traditional trees and shrubs that are found on the low-water use plant list. Primary trees may include Oak and Ash, with secondary trees including Evergreen Elm, Vitex, Bauhinia, and/or pollen free Swan-Hill Olive trees, among others. Plants may include Lantana, Indian Hawthorn, Boxwood, Lady Bank's Rose, Myrtle, Rosemary, Guara, and Verbena. 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 natural earth tones and elegant simplicity that are characteristic of the site's agrarian history. Theme walls and signage may use simple forms of stucco, single scored block, wood, cast stone and/or ornamental iron. To provide a pleasing contrast with the many shades of color present in the plant materials, the hardscape color scheme will be designed to complement the landscape palette, and will be accented with bright bursts of color at focal points and in site furniture. See **Figure 4**, *Open Space and Amenities Plan* for the general location of trees and recreational amenities, and **Figure 5**, *Wall Details* for the design concept for the primary theme wall and view fence proposed within the development. **Figure 5a**, *Community Monuments*, show a preliminary concept for community entry monuments located at the primary community entry at Cotton Lane and Sweetwater, and the neighborhood entry at Sweetwater and 173rd Avenue.

1.8 Drainage Master Plan

The site is generally sloping 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 generally 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. Cotton Lane is partially improved with no curb and gutter and slopes in a southerly direction.

The site is located mostly in Zone X according to FIRM Panel 04013C1660L, revised October 2013. A 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 and after approval, 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 a drainage channel traversing the eastern boundary along Cotton Lane 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 the different basins, proposed in different locations of the subdivision. 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.

1.9 Water & Sewer Master Plans

Water

The water in the area of the site is in two zones, zone 2 and zone 3 per EPCOR description. The zone 2 is in the east side of the project, and the zone 3 is in the west part of the project. Zone 2 connects to an existing 12" water line, approximately 700 feet south of Waddell Road on Cotton Lane. The waterline then continues southerly down Cotton Lane entering into the project on Sweetwater Avenue. It then heads northerly and westerly through the subdivision.

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. Thence, easterly along Sweetwater Avenue and then an 8" loop will head northerly and westerly through the subdivision until it connects to the existing 12" water line approximately 500 feet north of Sweetwater Avenue on 175th Avenue.

Sewer

The project sewer system will connect to the existing 12" sewer line at Cactus Road and Cotton Lane, heading north along Cotton Lane, entering the subdivision at approximately 1,400 feet north of the intersection. It will then head northwesterly into the subdivision to serve the balance off the project.

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, 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.

2.0. EXISTING CONDITIONS ANALYSIS

2.1 Property Location and Description

The proposed site is located on the northwest corner of Cotton Lane and Sweetwater Avenue alignment within the City of Surprise. More specifically, the property is an irregular-shaped parcel generally bounded by 175th Avenue to the west, vacant land and a large lot residential parcel to the north, Cotton Lane to the east, and Sweetwater Avenue alignment to the south. The subject site is defined in **Appendix 1, Legal Description and ALTA Survey**.

The following Assessor Parcel Numbers are included with this zoning application:

502-04-006D, Truman Trust
502-04-005D, Truman Trust
502-04-006A, Truman Trust
502-04-004B, Truman Trust
502-04-022D, Truman, James S/Carol D

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 and a single family residence to the north, developing commercial land to the east, vacant land to the south, and existing and future single family residential property to the west. See **Table 2** below and **Figure 1**, *Vicinity Map* for the existing land uses on the site and surrounding area.

The site is currently designated as *Neighborhood Character Area* with the City of Surprise 2035 General Plan. 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 Residential Ranch in the City of Surprise, permitting 1 dwelling units per acre. The intent of this zoning district is to preserve aspects of the City's rural heritage through preservation of existing working farms, ranches and open space. 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	Residential Ranch
NORTH	Vacant & single family residence	Neighborhood	R1-43 and PAD
EAST	Vacant, Future commercial	Commerce/Office & Transit Oriented Development District	PAD
SOUTH	Vacant	Neighborhood	Residential Ranch
WEST	Vacant & Single family residential	Neighborhood	PAD

2.3 Regional Facilities and Services

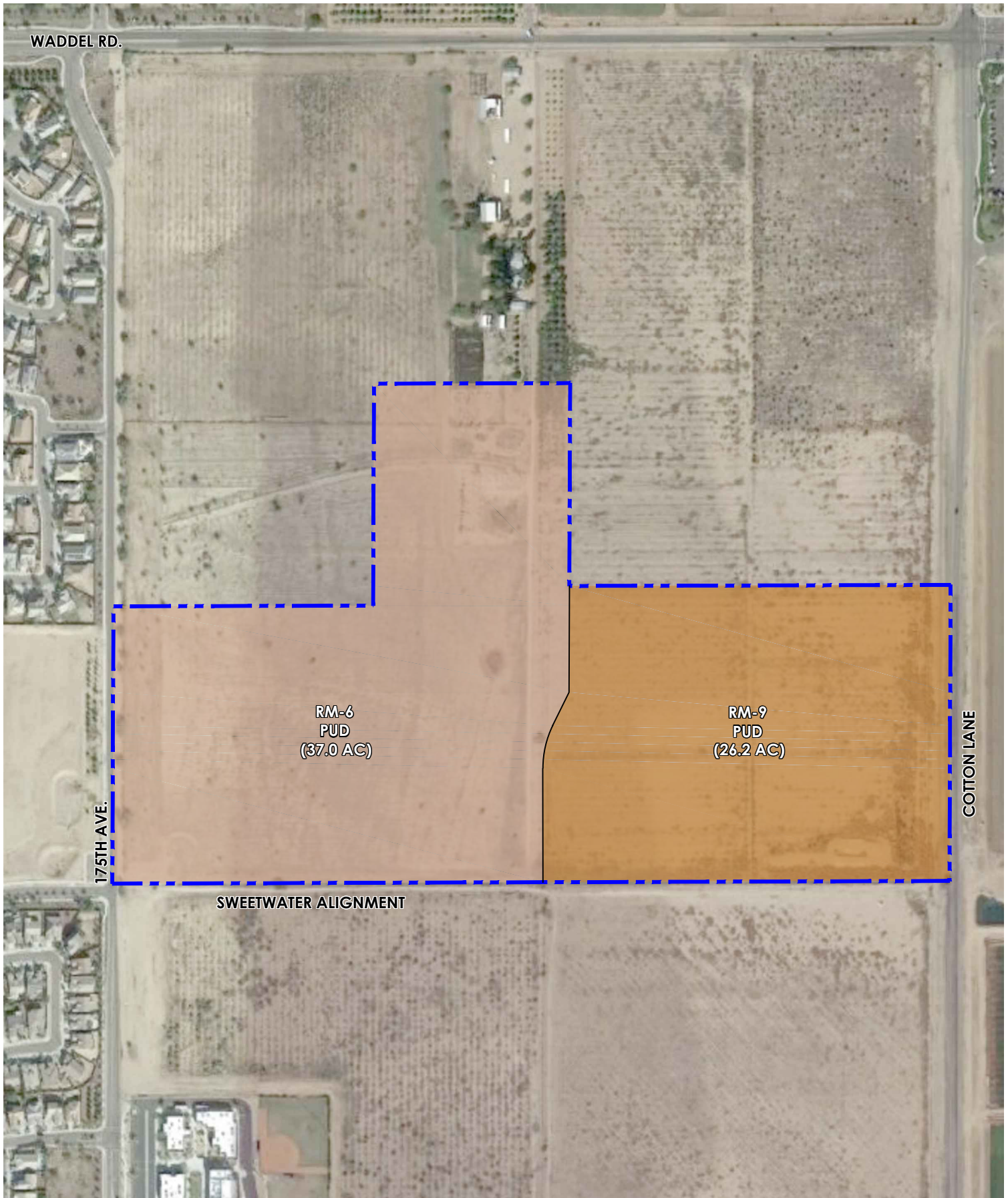
The site has recently been annexed into the City of Surprise, and as such is within the City of Surprise Municipal Planning Boundary. **Figure 1**, *Vicinity Map* shows the jurisdictional limits of the City of Surprise city limits in relation to lands within unincorporated Maricopa County.

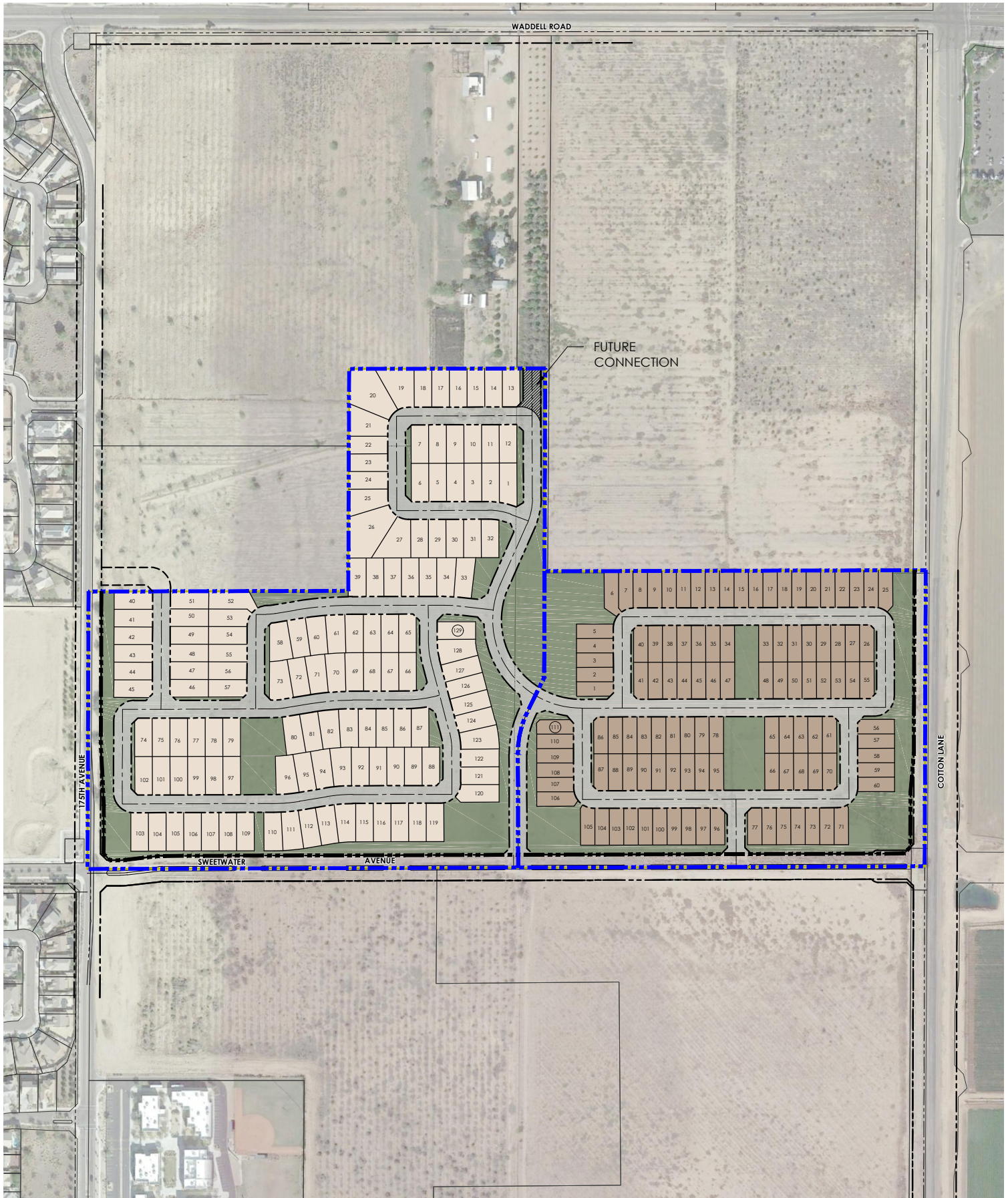
The proposed property is approximately ½ mile west of the Loop 303 Freeway, with direct access to both the Cactus Road and Waddell Road interchanges, providing excellent access to the site along the regional freeway system. The site is bounded by Cotton Lane, 175th Avenue, and the future Sweetwater Avenue 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 just south to the property at 12775 N. 175th Avenue.

Since the property has been annexed 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.







0' 200' 400' 800'



**RANCHO
TRUGOLD
SURPRISE, AZ**

FIGURE 3-DEVELOPMENT PLAN CONCEPT
12/20/17

LVA



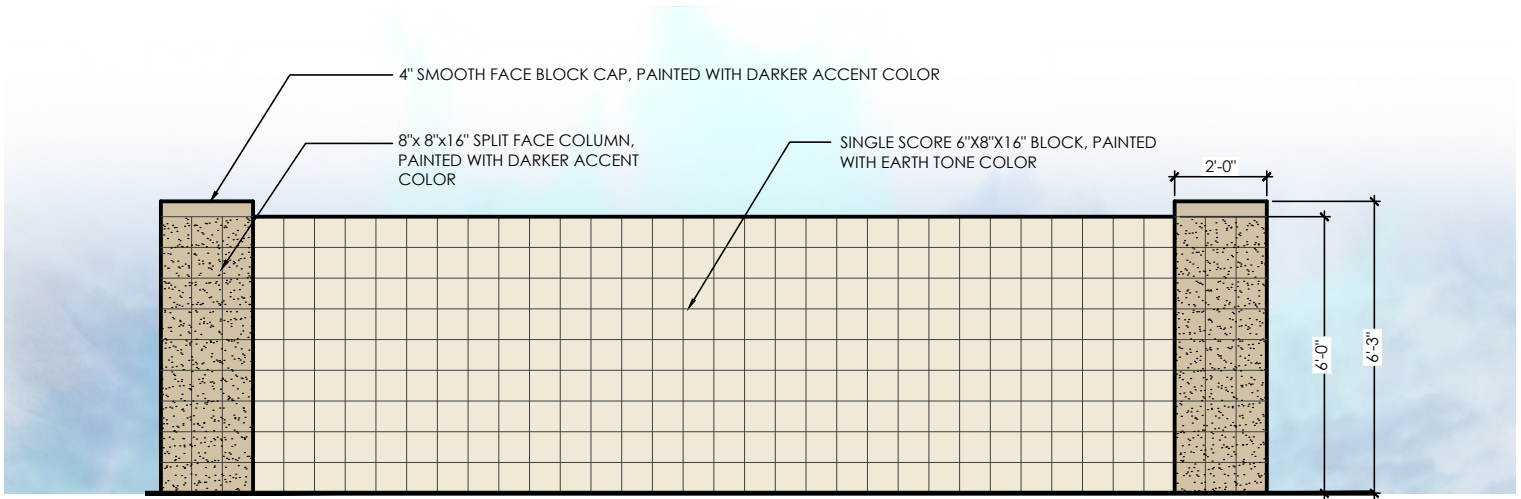
0' 200' 400' 800'



**RANCHO
TRUGOLD
SURPRISE, AZ**

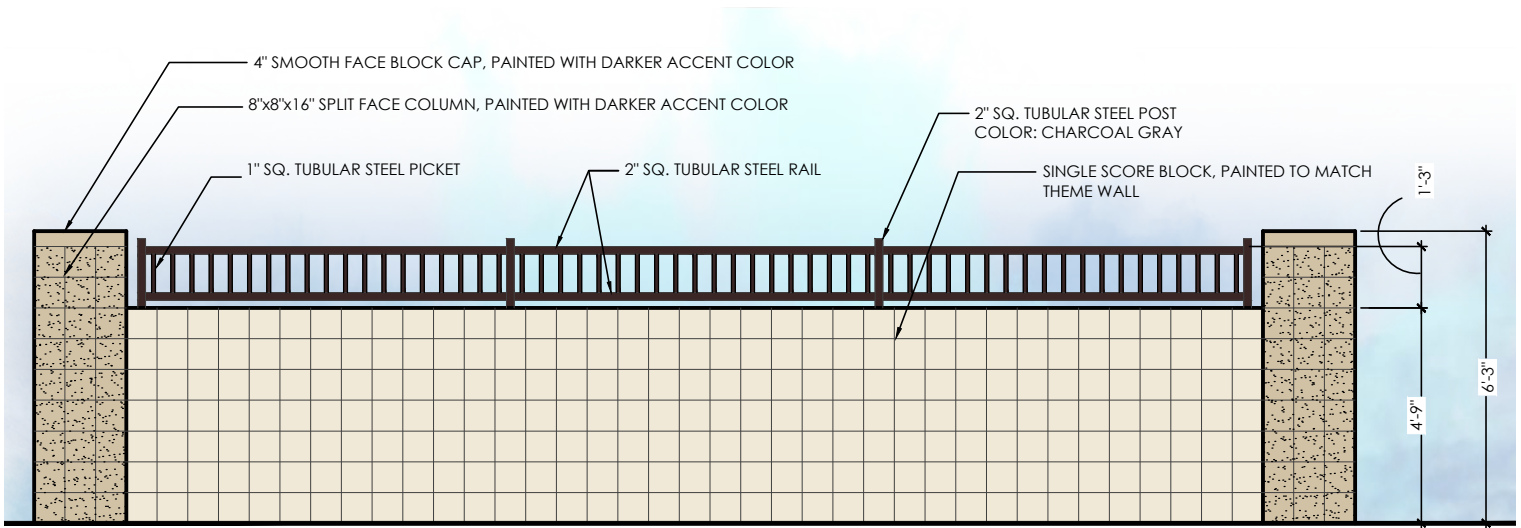
FIGURE 4-OPEN SPACE & AMENITIES PLAN
12/20/17

LVA



1 THEME WALL/COLUMN

SCALE: 1/2" = 1'-0"



2 PARTIAL VIEW FENCE

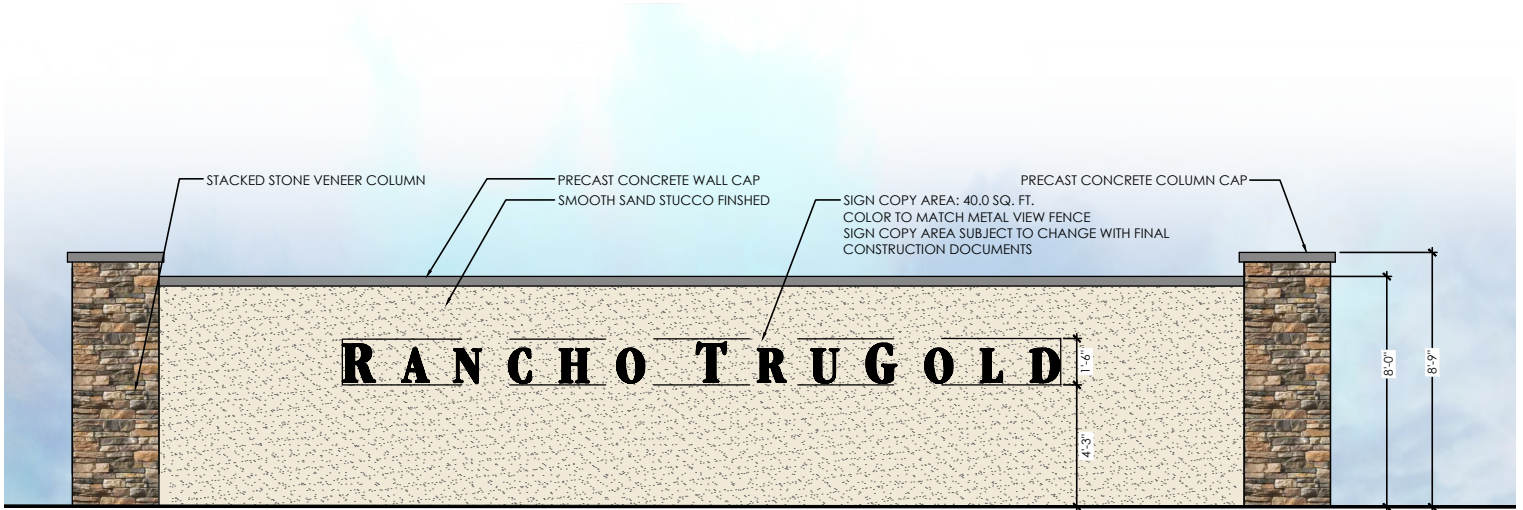
SCALE: 1/2" = 1'-0"

SCALE: NTS

**RANCHO
TRUGOLD
SURPRISE, AZ**

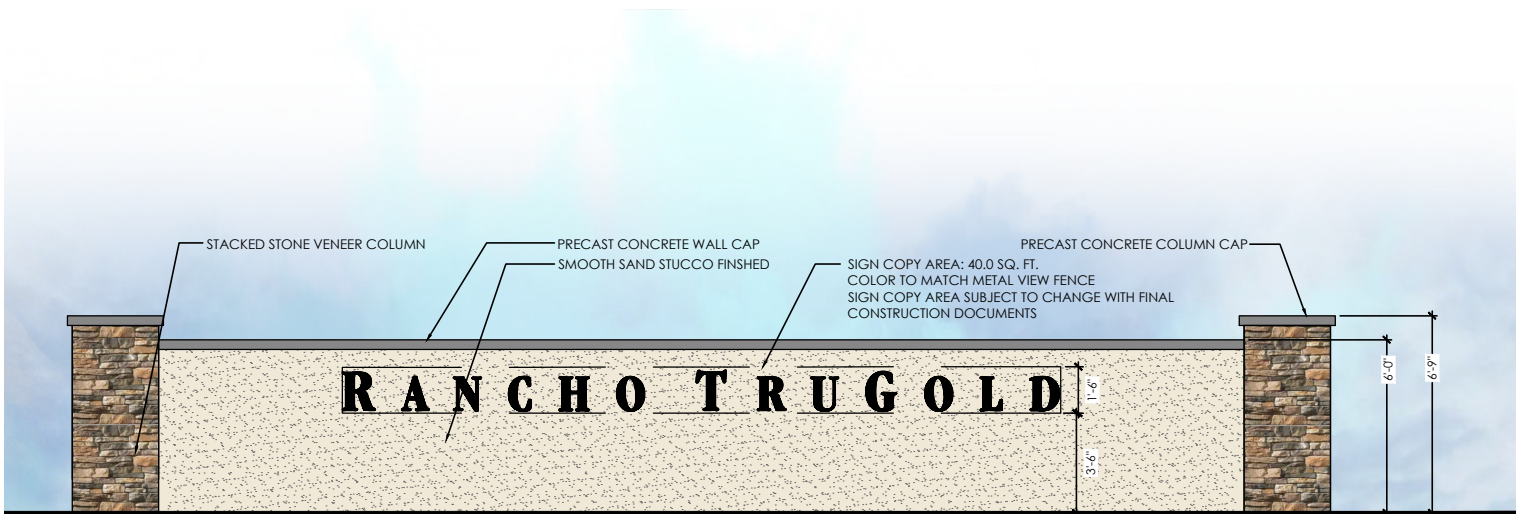
FIGURE 5-WALL DETAILS
12/20/17

LVA



4 COMMUNITY ENTRY MONUMENT

SCALE: 3/8" = 1'-0"



5 NEIGHBORHOOD ENTRY MONUMENT

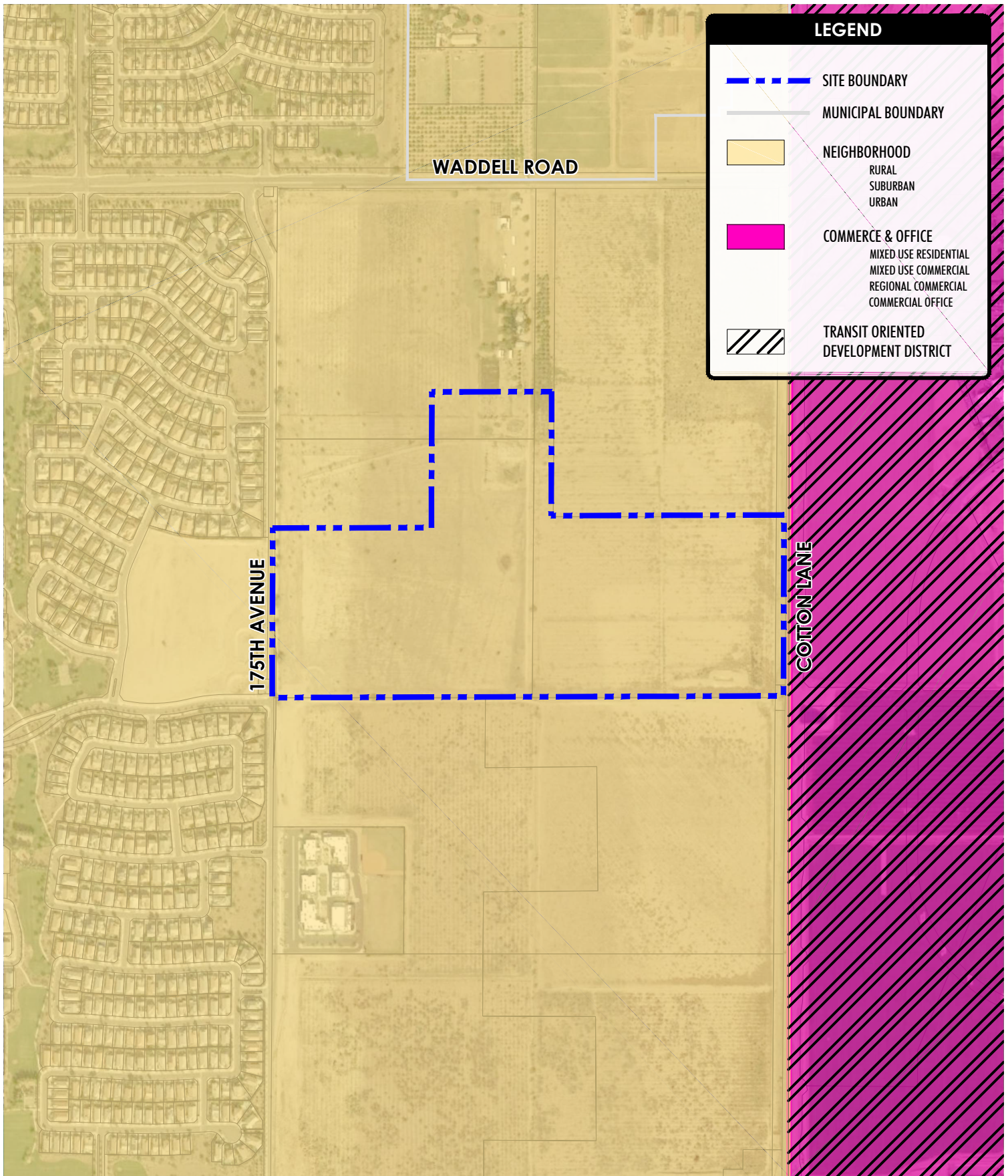
SCALE: 3/8" = 1'-0"

SCALE: NTS

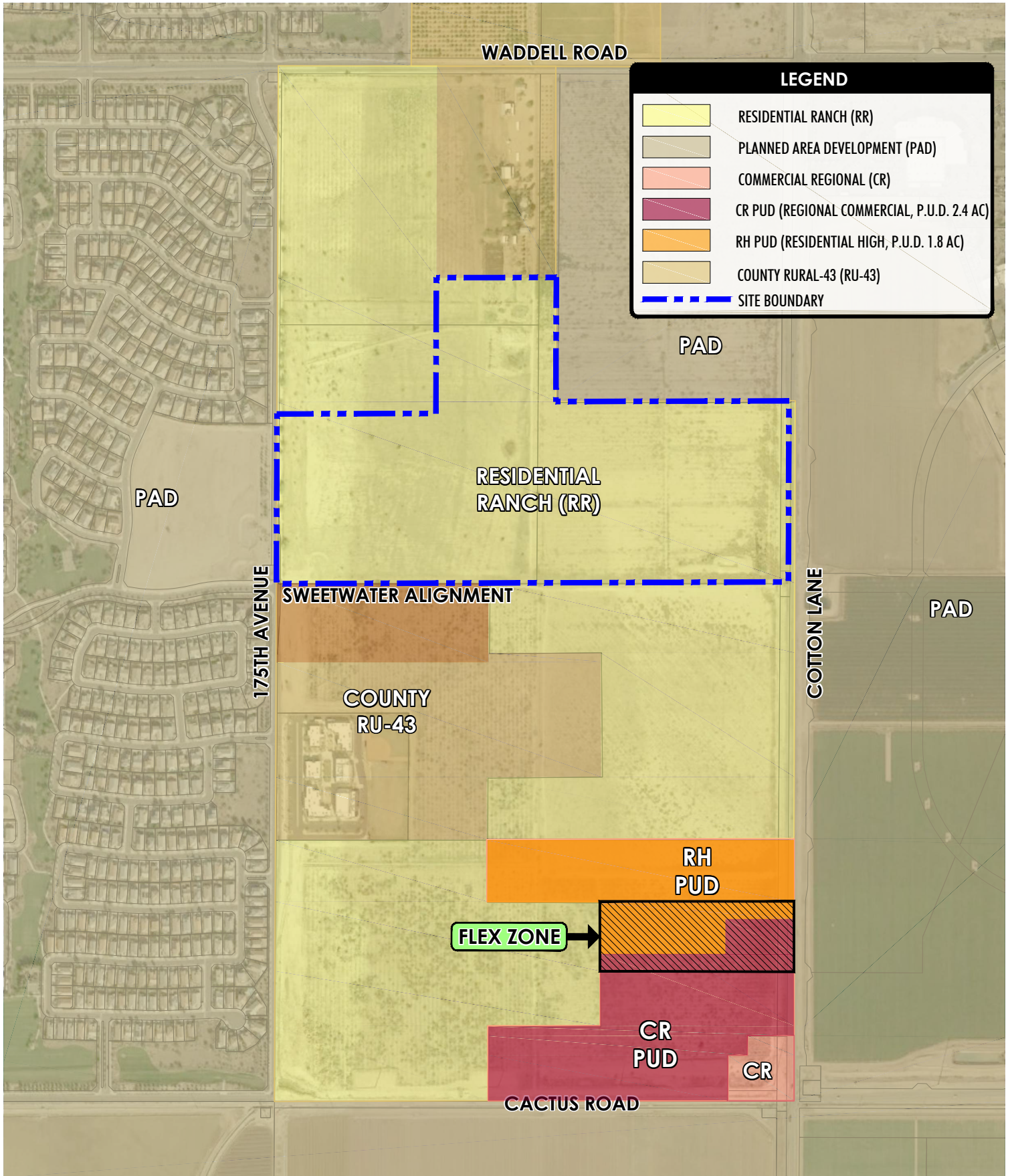
**RANCHO
TRUGOLD**
SURPRISE, AZ

FIGURE 5A-COMMUNITY MONUMENTS
12/20/17

LVA



SCALE: NTS 



SCALE: NTS 

Robert Kuhfuss

From: Debbie Trasancos <DebbieT@mwdaz.com>
Sent: Wednesday, October 04, 2017 10:48 AM
To: Jamie Sullivan
Cc: Chris Cain; Leslie Jarrell
Subject: MWD - FS17-583 NWC Cotton Lane and Sweetwater Electronic Submittal
Attachments: MWD Fees & Payment Schedule 2017.pdf; MWD Drawing Requirements.pdf

Thank you for providing the electronic submittal for Cotton Lane and Sweetwater Ave (CR17-312).

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

From: Jamie Sullivan [<mailto:Jamie.Sullivan@surpriseaz.gov>]
Sent: Wednesday, October 04, 2017 10:04 AM
To: Barbara Plante - Luke <barbara.plante@us.af.mil>; Brad Finke - EPCOR <bfinke@epcor.com>; Chris Cain <ChrisC@mwdaz.com>; Christina Betz <Christina.Betz@surpriseaz.gov>; Debbie Trasancos <DebbieT@mwdaz.com>; Denise Lacey <deniselacey@mail.maricopa.gov>; Donna Miller <Donna.Miller@surpriseaz.gov>; Jack Eaton <jack.eaton@dysart.org>; Kevin Shipman <kevin.shipman@dysart.org>; Leslie Jarrell <LeslieJ@mwdaz.com>; Mark Frago <fragom@mail.maricopa.gov>; Paul Jackson <paul.j.jackson@usps.gov>; Project Coordinator <redletter@azdot.gov>; Richard Hammitt <Richard.Hammitt@aps.com>; Sandy Simmons <Sandy.Simmons@surpriseaz.gov>; Theresa Tysiak - USPS <theresa.a.tysiak@usps.gov>; Timothy Klarkowski <Timothy.Klarkowski@surpriseaz.gov>; Vern Wolfley - MAG <vwolfley@azmag.gov>; Victor.Schaum <Victor.Schaum@cox.com>; Yvonne Aguirre <yvonne.aguirre@swgas.com>
Subject: RE: FS17-583 NWC Cotton Lane and Sweetwater Electronic Submittal

See password below.

A8PTXKB

From: Jamie Sullivan
Sent: Wednesday, October 04, 2017 10:01 AM
To: 'Barbara Plante - Luke'; 'Brad Finke - EPCOR'; 'Chris Cain - MWD'; Christina Betz; 'Debbie Trasancos - MWD'; 'Denise

Lacey'; 'Donna Miller'; 'Jack Eaton'; 'Kevin Shipman'; 'Leslie - MWD'; 'Mark Frago'; 'Paul Jackson'; 'Project Coordinator'; 'Richard Hammitt'; Sandy Simmons; 'Theresa Tysiak - USPS'; Timothy Klarkowski; 'Vern Wolfley - MAG'; 'Victor.Schaum'; 'Yvonne Aguirre'

Subject: FS17-583 NWC Cotton Lane and Sweetwater Electronic Submittal

Please click the following link to download your files:

https://FTP.SURPRISEAZ.GOV:443/AHT/AHT_UI/public/index.html#/password?package=jAbHexlW%2fwnfpAZc1vSnWKucaTMWiRKVBPOco9iVkJ03E%2fbPVfOZtHoSDKkUpmgDHvVgt8rzpkliPC11KdzfgJQ%2bFlyK9QVOE%2fcnrFi4Z3Jc%3d

Attached you will find the submittal documents for the above referenced project.

Due to the file size, I will be sending this through the FTP site. I will provide you a password shortly.

If you have any questions or need clarification, please feel free to contact me.

Thank you and I hope you have a great day!

Jamie Sullivan
Planning Project Coordinator
16000 N Civic Center Plaza
Surprise, AZ 85374
623.222.3099
[*jamie.sullivan@surpriseaz.gov*](mailto:jamie.sullivan@surpriseaz.gov)

City Hall offices open at 8 a.m. and close at 5 p.m. Monday through Friday. More info at www.surpriseaz.gov.

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0.1

04 Oct 2017 17:03:53 -0000

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: Rancho Trugold

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) 11/13/17

Future Council Work Session/Meetings target dates Planning and Zoning 03/01/, City Council 04/3/18

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

A R I Z O N A

Planning & Zoning Commission

March 6, 2018

Rancho TruGold

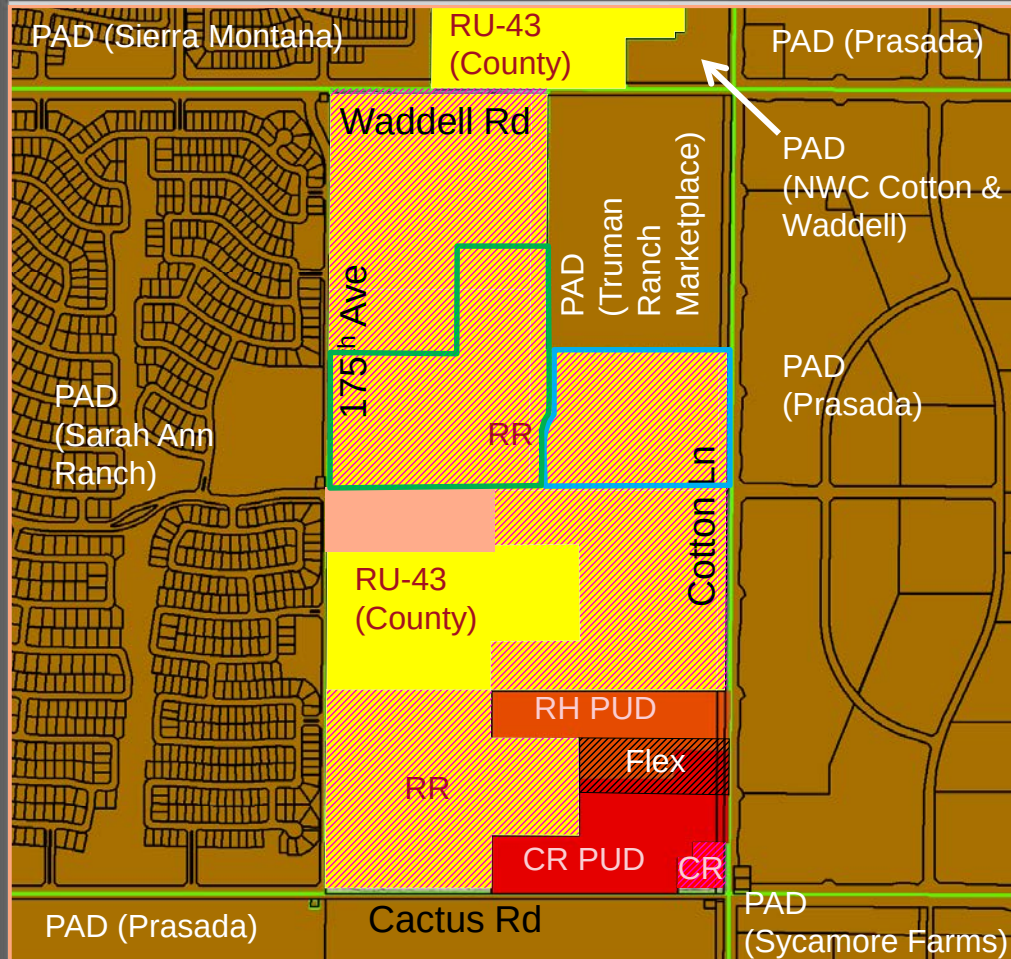
Zone Change and Preliminary Plat

FS17-583



Previously associated with the Magnolia Project



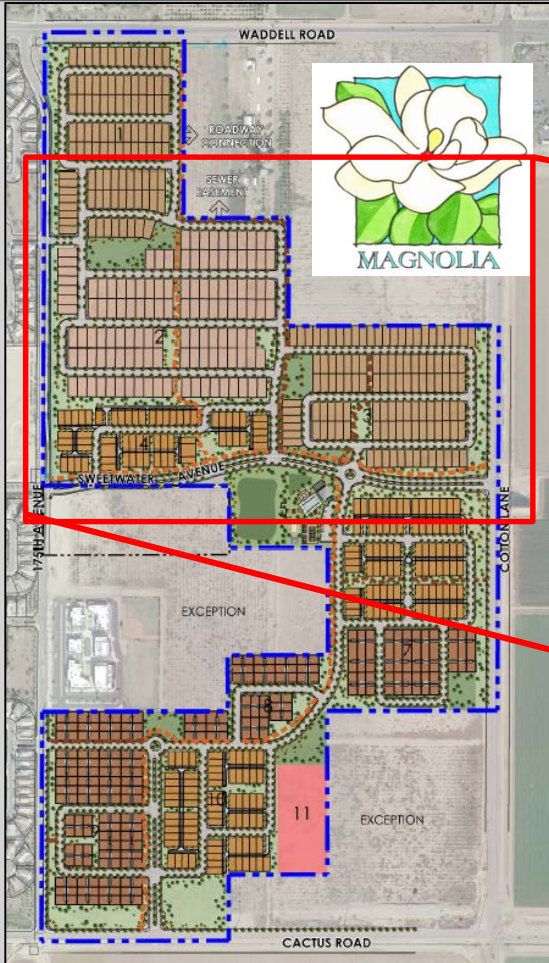


Zone Change

- Existing County RU-43 Zoning
- Existing Surprise RR Zoning*
- Existing Surprise RM-9 PUD Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise PAD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning
- Existing Surprise CR Zoning*
- Subject Property – Zone Change from RR to RM-9 PUD**
- Subject Property – Zone Change from RR to RM-6 PUD**

*Post-Annexation zoning approved as part of Annexation request under FS16-427

Original Configuration and Relationship



Zone Change

PUD OVERLAY

Zone Change

➤ Removes Community Pool requirement

“Medium density residential projects containing 60 residential units or greater shall be provided a swimming pool amenity, unless there is a community pool included as part of the overall development.” SUDC 122-137(r)

Rationale – With 20’ rear setbacks, individual yards will be large enough to accommodate private swimming pools if desired

PUD OVERLAY

➤ Adjusts Roadway Landscape Buffers

SUDC 122-137(e)(1)a requires an open space tract of not less than 60' in width adjacent to arterials and parkways. The PUD Overlay makes this 60' average width.

Rationale: The applicant proposes an average width of 60.

SUDC 122-137(e)(1)a.1 requires single-loaded streets with that houses face the 60' open space.

Rationale – There are no proposed single-loaded streets as they are not typical for the area.

Zone Change

PUD OVERLAY



Zone Change

PUD OVERLAY

Zone Change

- **Adjusts size of turf area associated with recreation field**

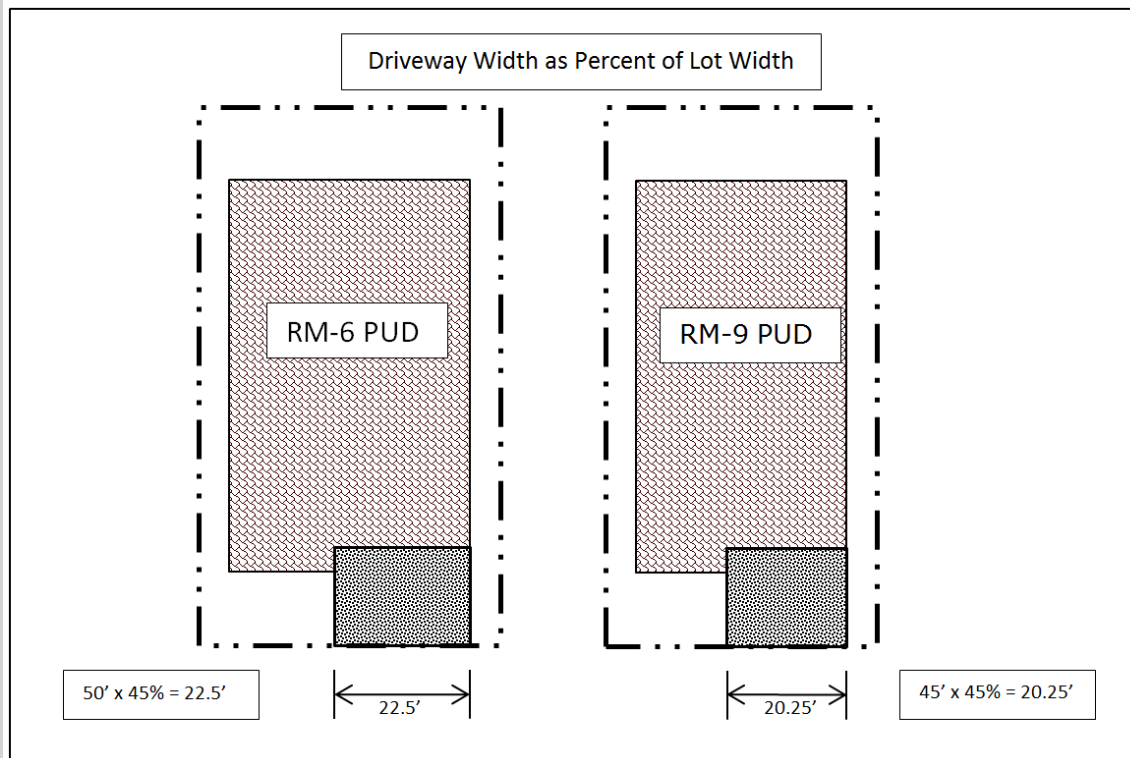
SUDC 122-137(p)(1) requires a turf recreational area of not less than 3.5 acres per 700 dwelling units.

Rationale:

- **At 252 dwelling units, this requirement is out of proportion to the community.**
- **The applicant is providing an amenitized 2.5 acre pocket park located in the center of the neighborhood that is to scale with the project.**
- **Project increases overall open space from 20% to 24%**

PUD OVERLAY

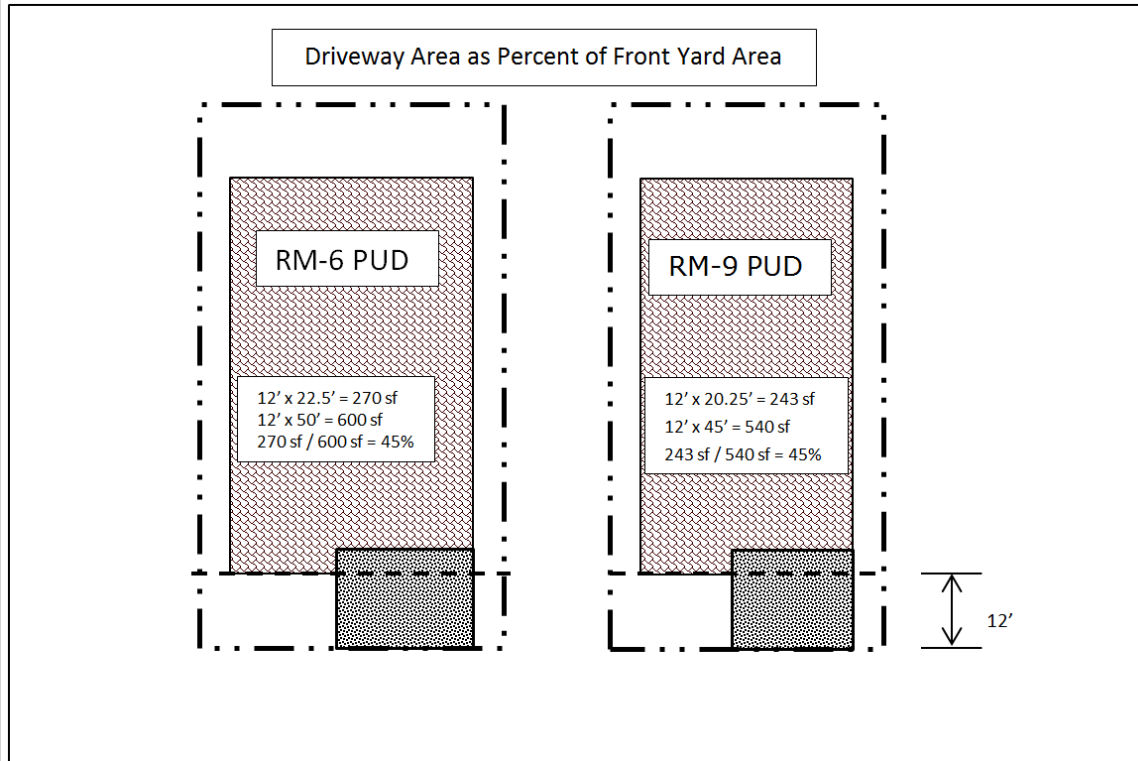
- Adjusts driveway width and area



Zone Change

PUD OVERLAY

- Adjusts driveway width and area



Zone Change

PUD OVERLAY

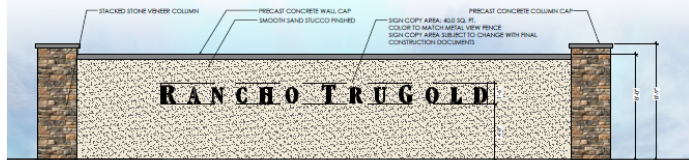
➤ Amends development standards

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

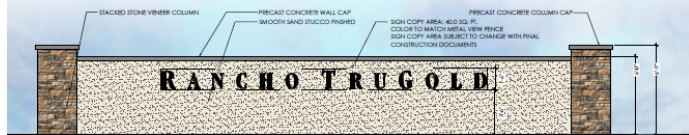
Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Density	6.0	5.0 (decrease in density)	9.0	5.0 (decrease in density)
Minimum Lot Area (sf) (1)	6,000	6,000	4,500	5,000 (increase in lot size)
Minimum Lot Width (ft)	50	50	40	45 (increase in lot width)
Minimum Lot Depth (ft)	100	100	100	100
Minimum Front Yard Setback (ft) (livable area/front-facing garage)	12/20	12/20	12/20	12/20
Minimum Side Yard Setback (ft)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft)	20	20	20	20
Maximum Building Height (ft)	35	35	35	35

Zone Change

Zone Change



4 COMMUNITY ENTRY MONUMENT
SCALE: 3/8" = 1'-0"



5 NEIGHBORHOOD ENTRY MONUMENT
SCALE: 3/8" = 1'-0"

SCALE: NTS



FIGURE 5A-COMMUNITY MONUMENTS
12/20/17



P:\2017\1705-TRUMAN-KID-CAD\PLANNING\LVA-1705-FIGURE 5-BUILD DETAILS.dwg On: 12/20/17



0' 200' 400' 800'

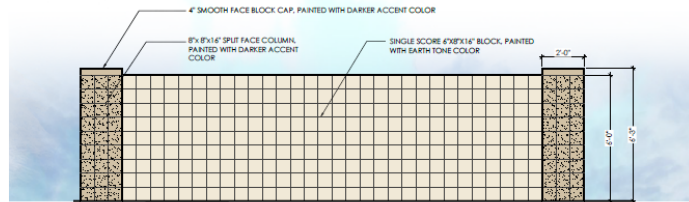


FIGURE 4-OPEN SPACE & AMENITIES PLAN
12/20/17

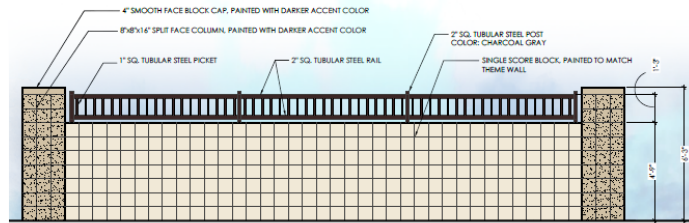


P:\2017\1705-TRUMAN-KID-CAD\PLANNING\LVA-1705-FIGURE 4-OPEN SPACE MASTER PLAN.dwg On: 12/20/17

Zone Change



1 THEME WALL/COLUMN
SCALE: 1/2" = 1'-0"



2 PARTIAL VIEW FENCE
SCALE: 1/2" = 1'-0"

SCALE: NTS



FIGURE 5-WALL DETAILS
12/20/17

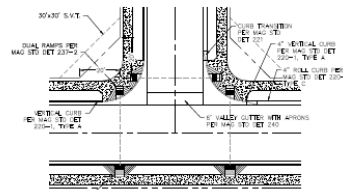
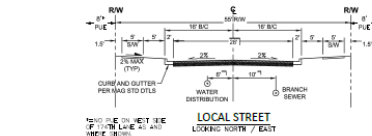


P:\2017\1705-TRUGOLD PLANNING\LVA-1705-FIGURE 5-WALL DETAILS.dwg Dec 20, 2017

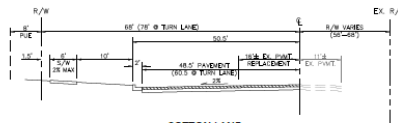
A PORTION OF THE NORTHEAST QUARTER OF SECTION 14, TOWNSHIP 3
NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER MERIDIAN, MARICOPA
COUNTY, ARIZONA

Preliminary Plat

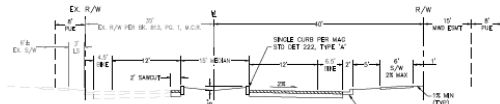
Preliminary Plat



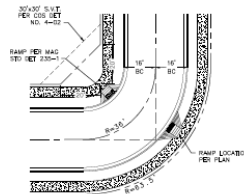
TYPICAL T-INTERSECTION GEOMETRY



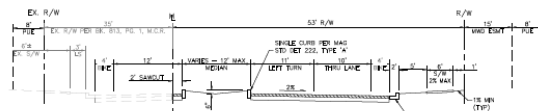
COTTON LANE
(MAJOR ARTERIAL)
LOOKING NORTH



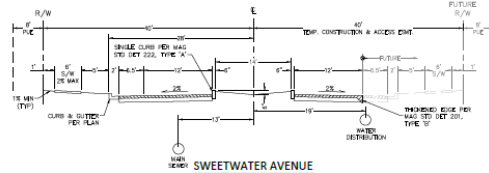
175TH AVENUE
(RESIDENTIAL COLLECTOR, TY
LOOKING NORTH



TYPICAL ELBOW GEOMETRY



175TH AVENUE
COINED RESIDENTIAL COLLECTOR,
SOUTH OF SHEETWATER AVE.)
LOOKING NORTH



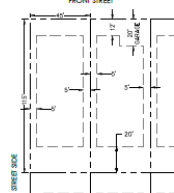
SWEETWATER AVENUE
(RESIDENTIAL COLLECTOR)
LOOKING EAST

TRACT TABLE

TRACT NAME		TRACT ROLE	
TRACT NAME	AREA (AC)	PURPOSE	
A	3.000	OPEN SPACE, DRAINAGE, WATER EXISTENT, UNDER EXISTENT, AND COMMUNITY ADJACENT	
B	0.880	OPEN SPACE, DRAINAGE, AND COMMUNITY ADJACENT	
C	0.215	OPEN SPACE AND COMMUNITY ADJACENT	
D	0.265	OPEN SPACE AND COMMUNITY ADJACENT	
E	2.254	OPEN SPACE, DRAINAGE, AND COMMUNITY ADJACENT	
F	0.048	OPEN SPACE AND COMMUNITY ADJACENT	
G	0.274	OPEN SPACE AND COMMUNITY ADJACENT	
H	0.080	OPEN SPACE AND COMMUNITY ADJACENT	
I	0.109	OPEN SPACE AND COMMUNITY ADJACENT	
J	0.052	OPEN SPACE AND COMMUNITY ADJACENT	
K	0.088	OPEN SPACE AND COMMUNITY ADJACENT	
L	0.110	OPEN SPACE AND COMMUNITY ADJACENT	
M	0.224	OPEN SPACE AND COMMUNITY ADJACENT	
N	1.124	OPEN SPACE, DRAINAGE, AND COMMUNITY ADJACENT	
O	2.084	OPEN SPACE, DRAINAGE, EXISTENT, WATER EXISTENT, AND COMMUNITY ADJACENT	
P	0.076	OPEN SPACE, DRAINAGE, AND COMMUNITY ADJACENT	
Q	0.196	OPEN SPACE, DRAINAGE, AND COMMUNITY ADJACENT	
R	0.036	OPEN SPACE AND COMMUNITY ADJACENT	
S	0.046	OPEN SPACE AND COMMUNITY ADJACENT	
T	0.038	OPEN SPACE AND COMMUNITY ADJACENT	
U	0.226	OPEN SPACE AND COMMUNITY ADJACENT	

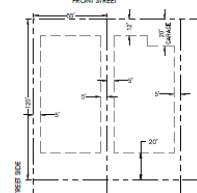
NOTE:
INDIVIDUAL LOT TABLES TO BE PROVIDED ON FINAL PLAN

45' X 115' LOT SIZE (5,157 S.F.)
RM-9 PUD
FRONT STREET



FRONT:	12'
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	20'

55' X 120' LOT SIZE (6,600 S.F.)
RM-6 PUD
FRONT STREET



FRONT:	12'
FRONT TO GARAGE DOOR:	20'
SIDE:	8'
REAR:	20'

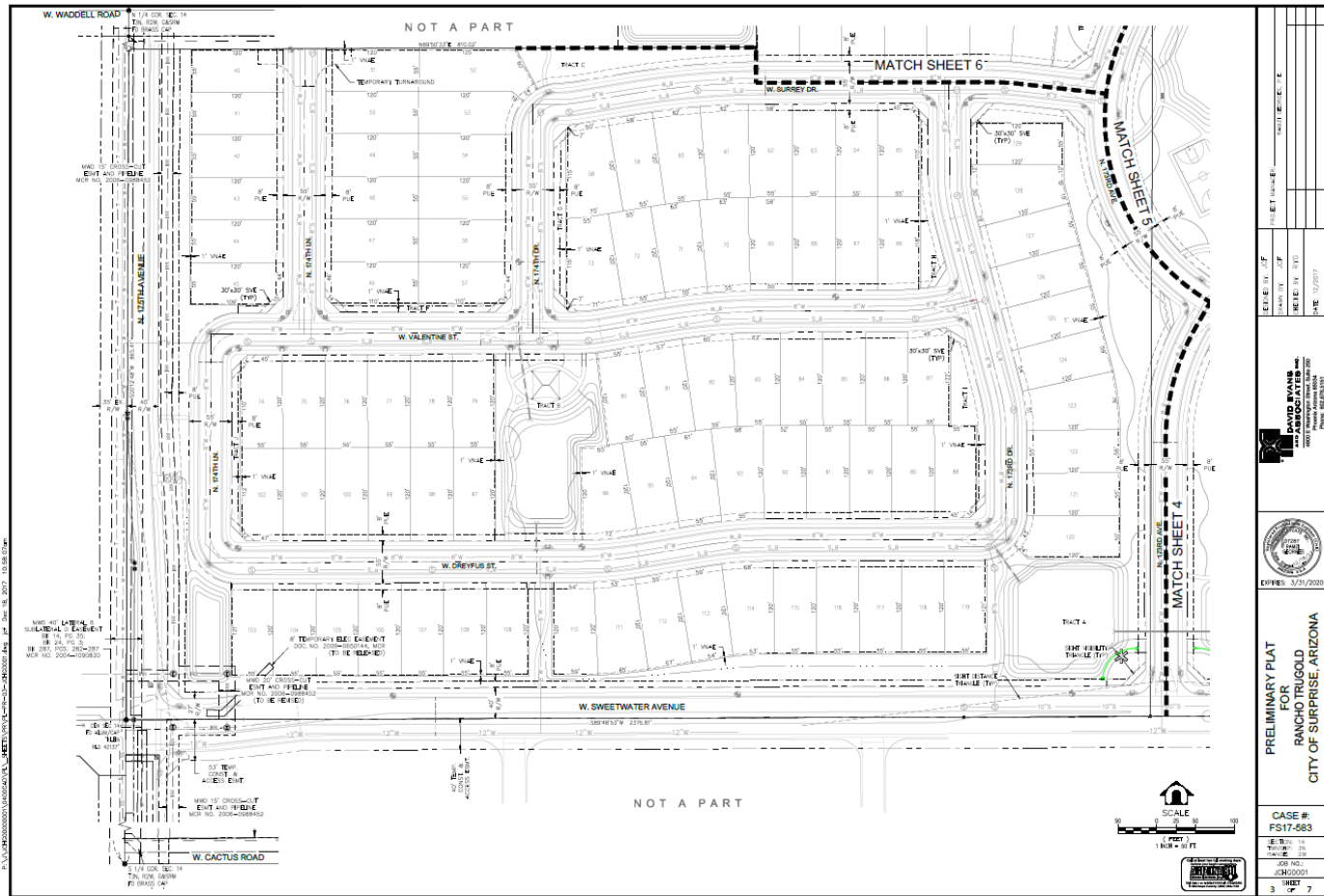
DETAILS & SECTIONS
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

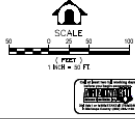
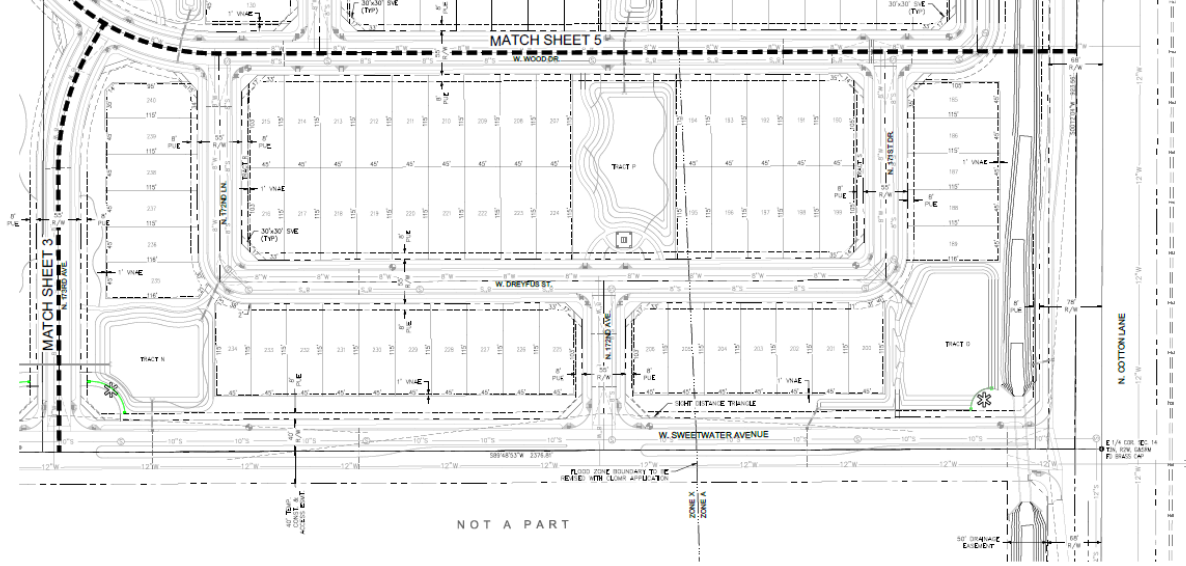
CASE #:
FS17-583

SECTION: 14
TAKING: 3N
RANGE: 2W
JOB NO.:
JCH00001
SHEET
2 OF 7



Preliminary Plat





PRELIMINARY PLAT
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

CASE #
FS17-583

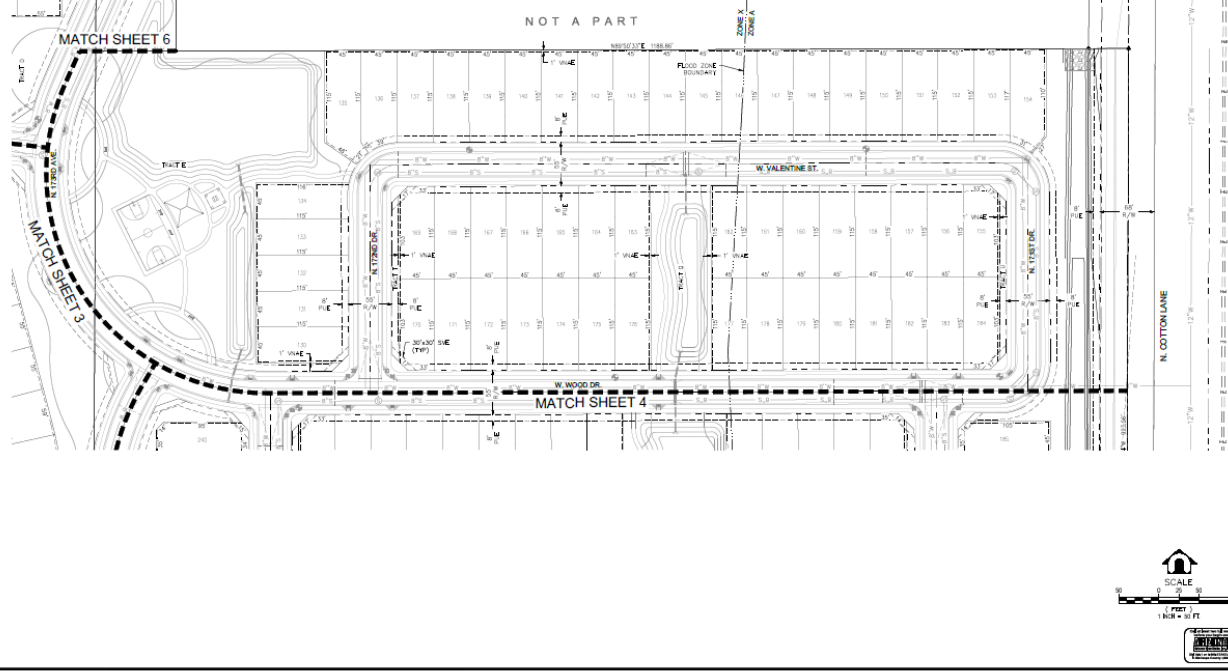
SHEET
4 OF 7

EXPIRES: 3/31/2020



DAVID R. EVANS
PROFESSIONAL ENGINEER
10001
PHOENIX, ARIZONA 85016
PHONE: 602.974.1000

DATE	12/20/20
REVIEWED BY	
DESIGNED BY	
CHECKED BY	
PROJECT NAME	
SHEET NO.	



CASE #: FS17-583	
SECTION: 14	TOWNSHIP: 3N
PLAT: 28	
JOB NO.: JCH00001	
SHEET	7

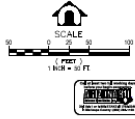
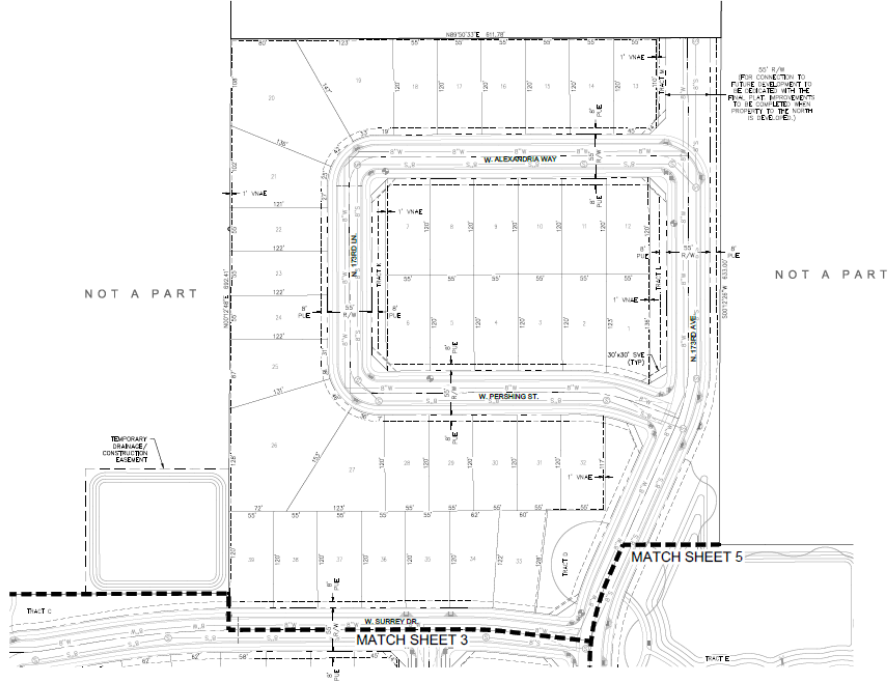
PRELIMINARY PLAT
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA



**DAVID EVANS
AND ASSOCIATES** INC.
4000 E. Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602/476-5551

DESIGNED BY: JCF
DRAWN BY: JCF
CHECKED BY: RYG
DATE: 12/2017

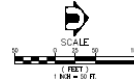
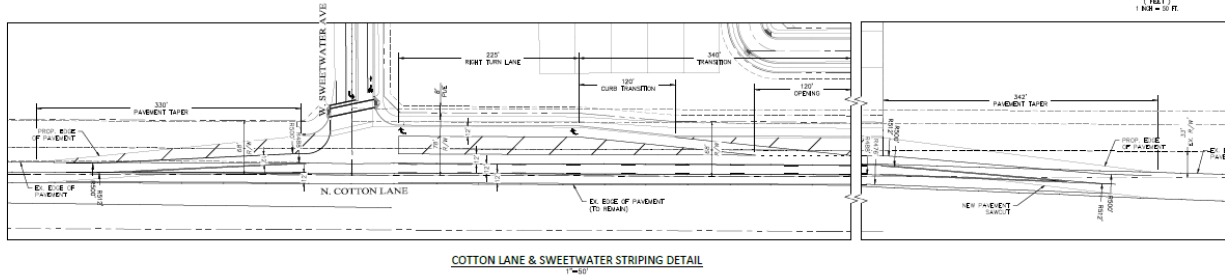
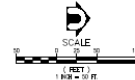
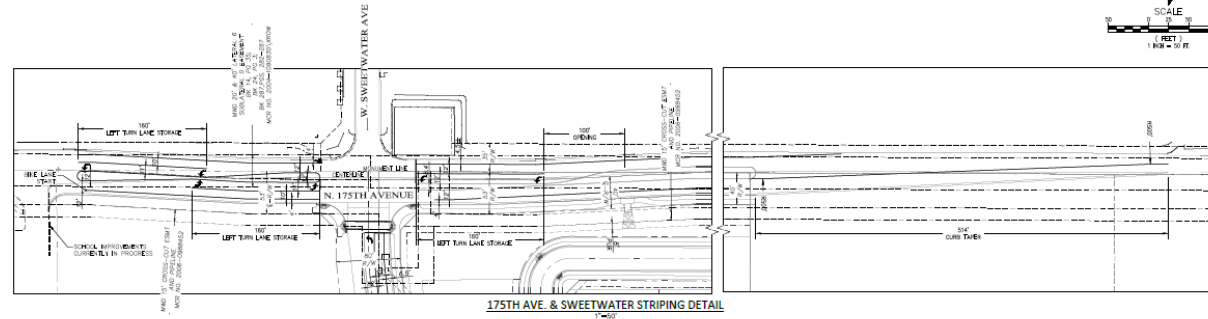
Preliminary Plat



PRELIMINARY PLAT FOR RANCHO TRUGLOD CITY OF SURPRISE, ARIZONA		CASE # FS17-583	
DATE 11/12/2017 BY JCH00001		DATE 11/12/2017 BY JCH00001	
APPROVED BY  DAVID R. BLAND REGISTERED LAND SURVEYOR 40013 Washington Street, Suite 200 Phoenix Arizona 85044		APPROVED BY  DAVID R. BLAND REGISTERED LAND SURVEYOR 40013 Washington Street, Suite 200 Phoenix Arizona 85044	
EXP. DATE 3/31/2020		EXP. DATE 3/31/2020	

Preliminary Plat

Preliminary Plat

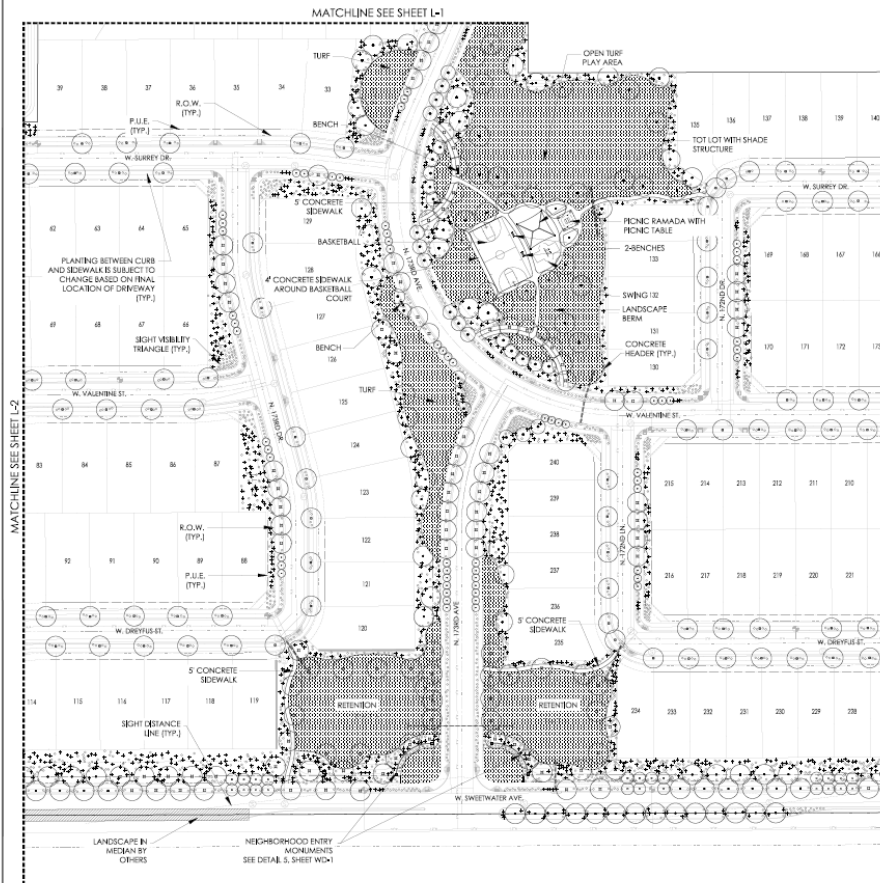


	STRIPING DETAILS FOR RANCHO TRUGOLD CITY OF SURPRISE, ARIZONA	
	CASE #	PS17-583
	DESIGNED BY	DATE
	REVIEWED BY	DATE
	PROJECT NAME	DATE
	DATE	DATE
	SHEET	7
	OF	7





Preliminary Landscape



PLANTING LEGEND

ACACIA ANUBIA*	MISGA
BAUHIA LUNARENSIS*	ANACARDIUM ORCHID
CASALPINA CALALAGO*	CASCALOTE "SMOOTH"
OLIA EUROPAEA "SWAN HIL"	"RUFFLES" OLIVE
RED PINK PINEAPPLE	CANDIDAL LINE OAK
QUERCUS VIRGINIANA*	EVERGREEN ELM
ULMUS PARVIFOLIA*	

ACACIA ANUBIA	MISGA
CHETALPA TASHENTENSIS*	CHETALPA
DAURIGRA "BLOOD"	INDIAN ROSEWOOD
BICALYPTIS MEXICANICA*	COTONWOOD TREE
FEJUS MICROCARPA	INDIAN LAUREL FIG
JACARANDA MIMOSA	JACARANDA
SOPHORA SECURIFLORA*	TEXAS MOUNTAIN LAUREL
THEVIA PERUVIANA*	YELLOW CLELANDER
VEREA AGULACASTUS	CHASTE TREE

BUXUS MICROPHYLLA JAPONICA	JAPANESE BOXWOOD
CAULENTON VINAUPE	UTILE CORN BOTTLEBRUSH
CARRISA MICROCARPA	BORWODE BEAUTY NATAL PLUM
CHRYCANTHA MEXICANA*	DAIMPTA
CHETUS MICOLAR	FORENIGHT LILY
ERITROPHYLLA MACULATA*	VALENTINE BUSH
GARDENIA JASMINEDES	GARDENIA
HIBISCUS ROSA-MIRINDIS	CHINESE HIBISCUS
HEX VOMITARIA "STONES"	SWAMP TAURON
MULBERRIGRA RESINO*	DEER GRASS
MYRTES COMMANE "COMPACTA"	HEAVENLY BAMBOO
NANDINA DOMESTICA*	CARE FLUMMAGO
PLUMARCO AUBRELIANA*	BALUBRA INDIAN HAWTHORN
RAPHANOLITE INERICA "SALLERNA"	JORDIA
SHAMONDIS CHINESE	ARBOREA YELLOW BELLS
TICOMIA STANS "ORANGE JUMPER"	ARBOREA ROSEWOOD
VAUDELIA CALIFORNICA*	

CYCAS REVOLUTA*	SAGO PALM
DIANA INCHINSE	INCHINSE REELLOSDI
HESPERALOE PARVIFLORA*	RED YUCCA
YUCCA BACATA*	BANANA YUCCA
YUCCA GLORIOSA*	SPANISH DAGGER
YUCCA REVOLUTA*	PENDULOUS YUCCA

CARRISA GRACIELORA	GREEN CARPET NATAL PLUM
CONVOLVULUS "BEDDLE"	SWAMP MORNING GLORY
GAZANIA BEERS "TUN GOLD"	SUN GOLD GAZANIA
LANTANA CAMARA "NEW GOLD"	NEW GOLD LANTANA
LANTANA MONTENIDENSIS*	PURPLE TRAILING LANTANA
LANTANA MONTENIDENSIS "WHITE"	TRAILING WHITE LANTANA
ROSAMIRIS CRISTALLINA*	PROCRISTE ROSEMARY
TRACHELOPERGUM AGARICUM	SWAMP STAR JASMINE
VERBENA SP.	VERBENA
VINCA MAJOR	VINCA MAJOR
ZEPHYRANTHES SP.	SABILLA

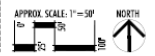
BOGARDIVILLA BRADBURY*	LA JOLLA BOGARDIVILLA
OLEANDRA SHIMPERIENSIS	CALIFORNIA JASMINE
LOMBODIA JAPONICA "SALLERNA"	HALL'S HONEYBUCKLE
ROSA BANKSII*	LADY BANKS ROSE

ACACIA ANUBIA*	SOD - HYDRIC BERNALDA
----------------	-----------------------

Notes:

1. Plant on the ADWR Low Water Use Drought Tolerant plant list.
2. Plant species that are approved for use in public right-of-way per FDOT 6-1.
3. Trees with most growth within the 10' diameter in 10 years on any sidewalk and have their main vertical leader intact and shall remain undisturbed.

KEYMAP



SCALE: N.T.S.

urban design studio
landscape architecture
interior design • landscape architecture • landscape architecture
1300 North Main Street • Suite 100 • 480.254.8854
info@urban-design-studio.com • www.urban-design-studio.com



RANCHO TRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
John C. & Helen G. Trueman, T.A.

LANDSCAPE PLAN

DATE: 09/19/17
JOB NO.: 1735
OWNER: LHA
SHEET #

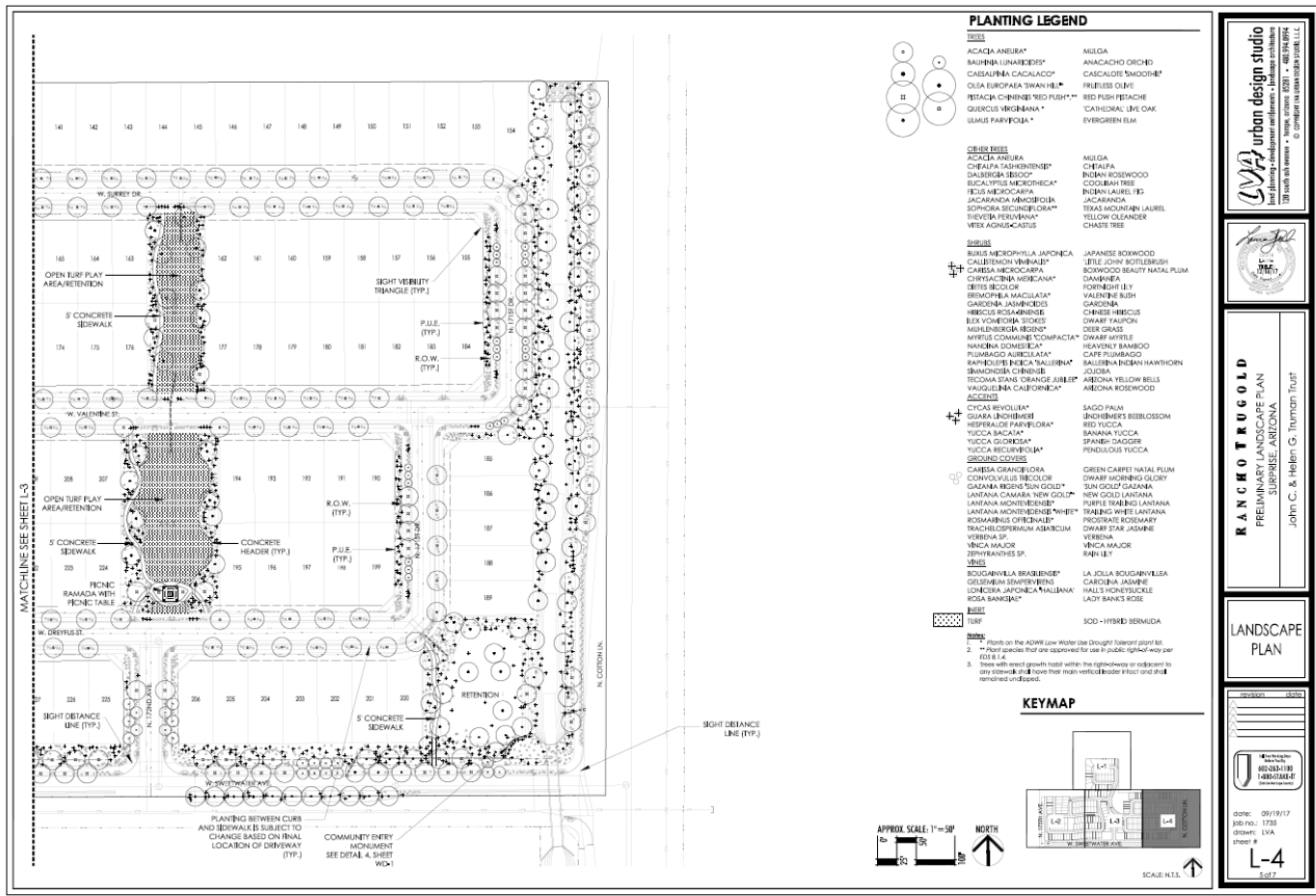
L-3
4 of 7

CITY OF SURPRISE CASE #1517-583

Preliminary Landscape

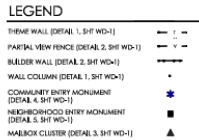


Preliminary Landscape





Preliminary Landscape



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.

LVA urban design studio
landscape planning • development entitlements • landscape architecture
120 south oak avenue • tempe, arizona 85281 • 480.994.0994
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RANCHO TRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA

John C. & Helen G. Truman Trust

WALL
PLAN

revision	date
	
date:	09/19/17
job no.:	1735
drawn:	LVA
sheet #	W-1
4 of 7	

date: 09/19/17
job no.: 1735
drawn: LVA
sheet #
W-1
6 of 7

CITY OF SURPRISE CASE #FS17-583

APPROX. SCALE: 1" = 100'

100'

50'

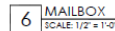
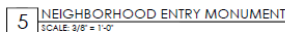
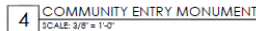
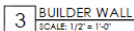
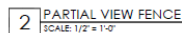
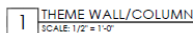
50'

200'

NORTH



Preliminary Landscape



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and planning • development of public space • landscape architecture
20 south 9th avenue • houston, tx 77001 • 713.994.0994
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LANCHOTRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA

WALL DETAILS



date: 09/19/17
job no.: 1735
drawn: LVA
sheet #
WD-
7 of 7

CITY OF SURPRISE CASE #FS17-583

Citizen Outreach:

October 19, 2017



Staff Recommendations:

Zone Change: **Approve** subject to stipulations “a” and “b”

Preliminary Plat: **Approve** subject to stipulations “a” thru “g”



SURPRISE
ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



CITY OF SURPRISE
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

Back Print

Board Meeting Date:	March 1, 2018	Contact Person:	Robert Kuhfuss - Community Development
Submitting Department:	CD Boards and Commissions	District:	3
Staff Recommendations:	Approve		

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

Agenda Wording:

Consideration and action regarding a Preliminary Plat in the RM-6 PUD and RM-9 PUD zoning districts, for Rancho TruGold, generally located along the Sweetwater Avenue Alignment between Cotton Lane and 175th Avenue

Motion:

Move to recommend approval to the City Council subject to stipulations “a” through “e” as stated in the Staff Report.

Background:

Mark Reddie of LVA Urban Design Studio, on behalf of Truman Trust seeks approval of a Preliminary Plat in the RM-6 PUD and RM-9 PUD zoning districts. The proposed Preliminary Plat will provide 117 single-family lots in the RM-9 PUD zoning district as well as 135 single-family residential lots in the RM-6 PUD zoning district. The project anticipates the development standards being amended through a related Zone Change being discussed under separate cover.

Financial Impact Statement:

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

ATTACHMENTS:

Click to download

- ☐ [00 - FS17-583 - Rancho TruGold Preliminary Plat - Staff Report](#)
- ☐ [01 - FS17-583 - Rancho TruGold Preliminary Plat - Vicinity Map](#)
- ☐ [02 - FS17-583 - Rancho TruGold Preliminary Plat - Case Map](#)
- ☐ [03 - FS17-583 - Rancho TruGold Preliminary Plat](#)

- ☐ [04 - FS17-583 - Rancho TruGold Preliminary Plat - Landscape Plan](#)
- ☐ [05 - FS17-583 - Rancho TruGold Preliminary Plat - MWD Comments](#)
- ☐ [06 - FS17-583 - Rancho TruGold Preliminary Plat - Presentation](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

Robert H. Kuhfuss, AICP

PRELIMINARY PLAT

REPORT TO THE PLANNING AND ZONING COMMISSION

Case: FS17-583

Project Name: Rancho TruGold Rezone

Council District: 3

Meeting Date: March 1, 2018

Planner: Robert H. Kuhfuss, AICP

Owner: Truman Trust

Applicant: Mark Reddie of LVA Urban Design Studio on behalf of Truman Trust

Request: Preliminary Plat in the RM-6 PUD and RM-9 PUD zoning districts

Site Location: Generally located along the Sweetwater Avenue alignment between Cotton Lane and 175th Avenue

Area and Density:

Proposed Zoning District	Lot Yield	Acreage	Gross Density
RM-6 PUD	135	37.0	3.7
RM-9 PUD	117	26.2	4.5
Total	252	63.2	4.0

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 'e'

Introduction:

Initially, the applicant sought approval of five (5) separate requests in what was then a county island located in the western portion of Surprise, near Sarah Ann Ranch. Those five requests are listed below:

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

The two Zone Change requests and their related Preliminary Plats were presented to the Planning and Zoning Commission, who made a favorable recommendation to the City Council. The City Council approved the annexation on January 17, 2017, but continued the two Zone Change requests and two Preliminary Plats to a date-certain of February 7, 2017 at the applicant's request. During the February 7, 2017 City Council meeting, the applicant informed the Council that due to contractual issues, the collective of projects could not move forward at that time. The Council then remanded two Zone Change requests and two Preliminary Plats back to the Planning and Zoning Commission until such time as the development plans could be revised. Since that time, the various owners of the previous land assemblage have been working to bring forth revised submittals independently. The subject case is one of those revised submittals. A related Preliminary Plat, also submitted under this case number, is discussed under separate cover.

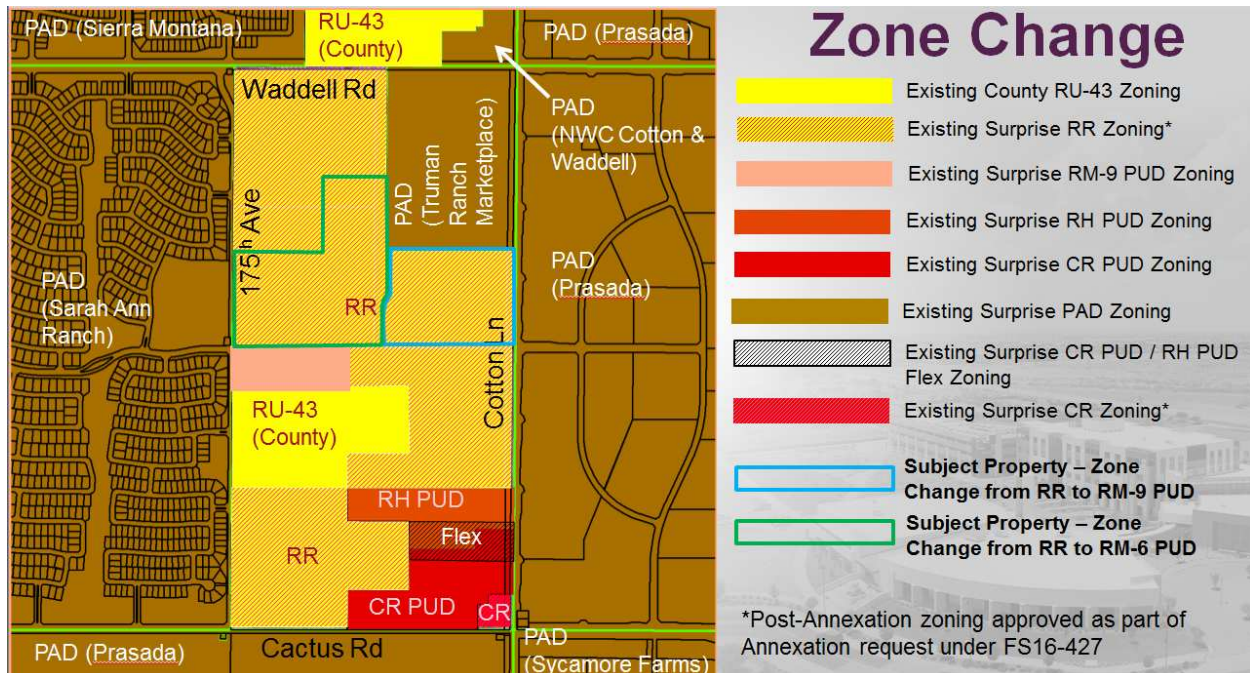
Project Description:

The subject request involves a Preliminary Plat of approximately 26.2 acres of recently incorporated land from Residential Ranch (RR) to RM-9 PUD, and approximately 37.0 acres of recently incorporated land from Residential Ranch (RR) to RM-6 PUD. Both districts include a PUD Overlay to allow modifications from the base development. These modifications relate to minimum lot width and minimum lot area, deletion of the community pool requirement, the configuration of perimeter landscaping, the reduction of turf area associated with a recreational field, as well as the area and width of residential driveways. The respective PUD Overlays will also cap the RM-9 portion to 4.47 Dwelling Units per Acre as opposed to 9 Dwelling Units per Acre, and 3.65 Dwelling Units per Acre for the RM-6 portion as opposed to 6 Dwelling Units per Acre.

[Continued following page.]

Existing Zoning:

The following map and associated chart depict the existing zoning of the subject site and its surrounds.



PAD (Sarah Ann Ranch)	Residential Ranch (RR) and PAD (Truman Ranch Marketplace)	Residential Ranch (RR)
PAD (Sarah Ann Ranch)	Residential Ranch (RR)	PAD (Prasada)
PAD (Sarah Ann Ranch)	RM-9 PUD and Residential Ranch (RR)	PAD (Prasada)

Background:

April 21, 2016: Staff discussed a proposal involving the subject property during a regularly scheduled Concept Review meeting under CR16-171.

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, 2016: The applicant held a neighborhood outreach meeting to discuss the larger Magnolia project.

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

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 15, 2016: The Commission continued FS16-391 to a date-certain of January 5, 2017 due to an advertising error.

January 5, 2017: The Planning and Zoning Commission recommended approval of the zone change requested under FS16-391 subject to staff-recommended stipulation “a” through “c”.

January 17, 2017: The City Council approved the annexation of the subject property under case FS16-427.

January 17, 2017: The City Council continued FS16-391 and FS16-392, a companion case, to a date-certain of February 7, 2017 at the applicant’s request.

February 7, 2017: The City Council remanded FS16-391 and FS16-392, to the Planning and Zoning Commission at the request of the applicant.

July 6, 2017: Staff met with the applicant to discuss the subject project during a regularly scheduled Concept Review meeting under CR17-312.

October 3, 2017: The applicant submitted a request for a Zone Change and Preliminary Plat under case FS17-583, the subject case.

October 3, 2017: The City Council approved a Zone Change for 175th and Sweetwater under case FS16-391.

November 13, 2017: The applicant held a neighborhood outreach meeting to discuss the subject request.

December 19, 2017: The City Council approved a Preliminary Plat for 175th and Sweetwater under case FS17-403.

February 1, 2018: The Commission recommended approval of the Heritage Farm Zone Change and Preliminary Plat to the City Council.

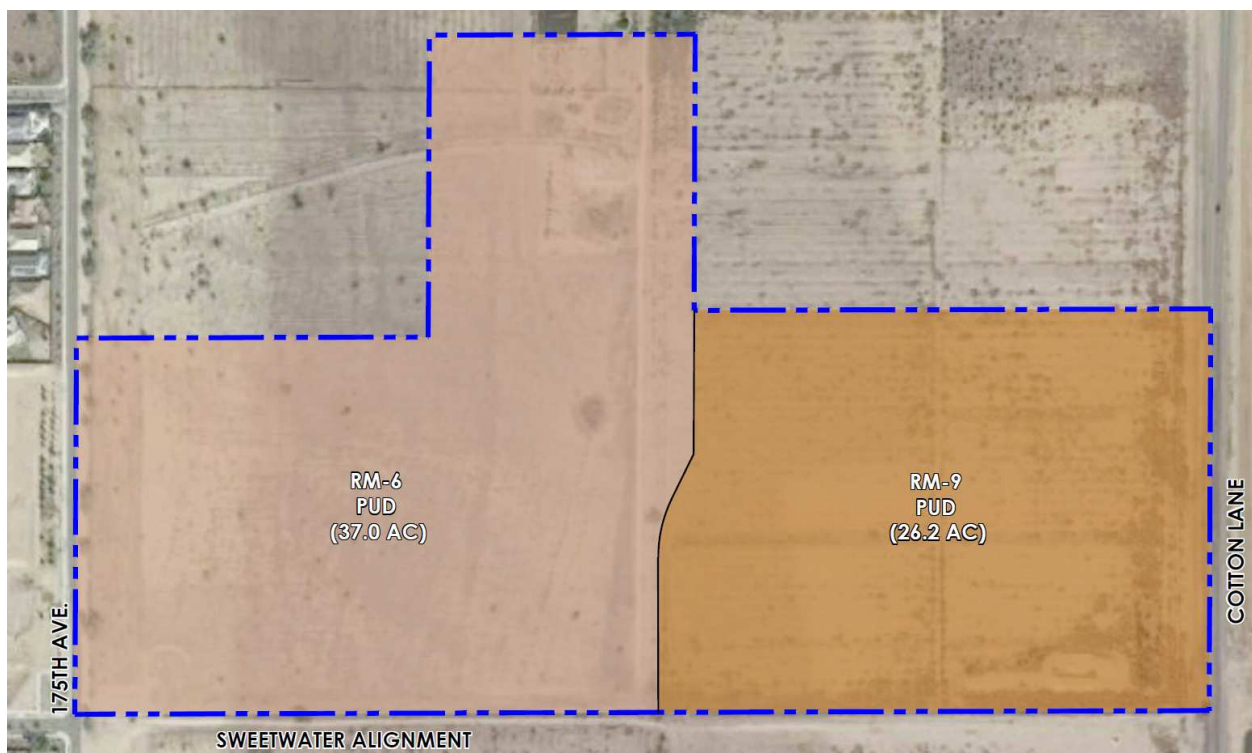
March 6, 2018: The City Council is scheduled to hear the Heritage Farm Zone Change and Preliminary Plat.

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. The applicant held a second outreach meeting on November 13, 2017, which was also well attended. The applicant received one (1) written comment relating to the need for street improvements in the area. No revisions to the proposed development plan were necessitated as a result of any feedback received.

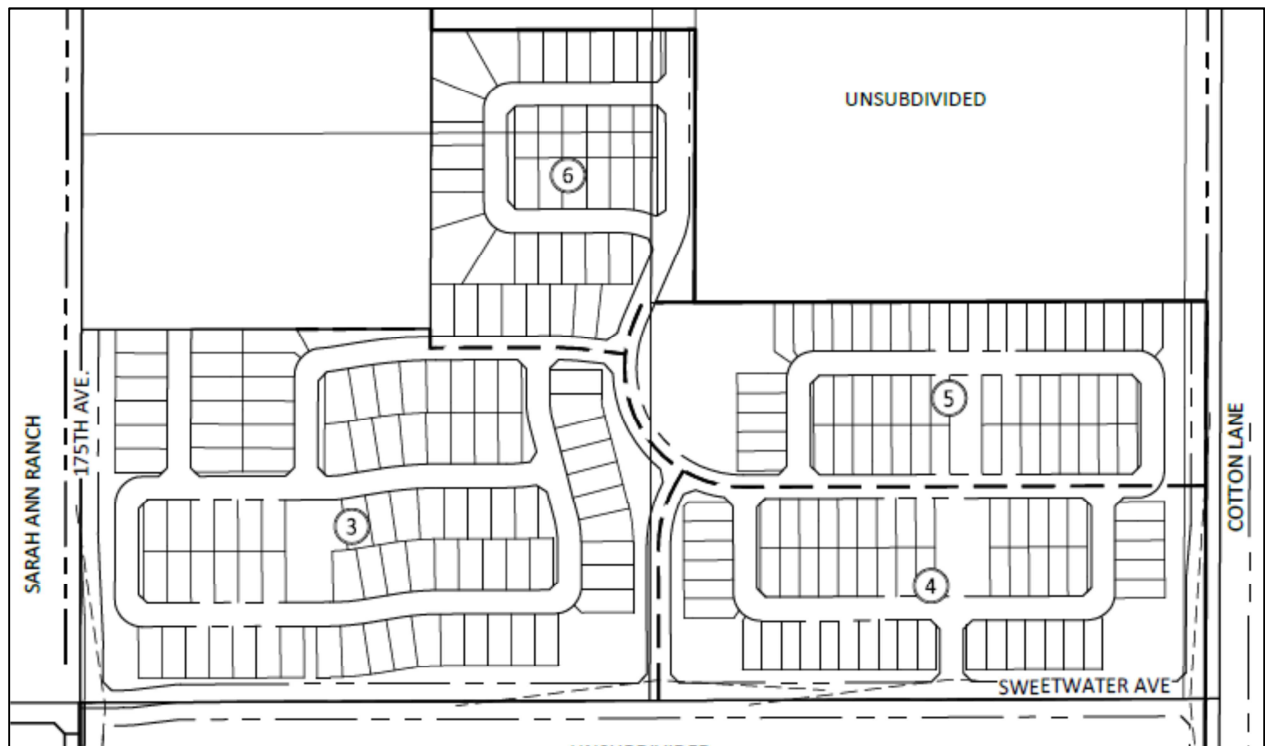
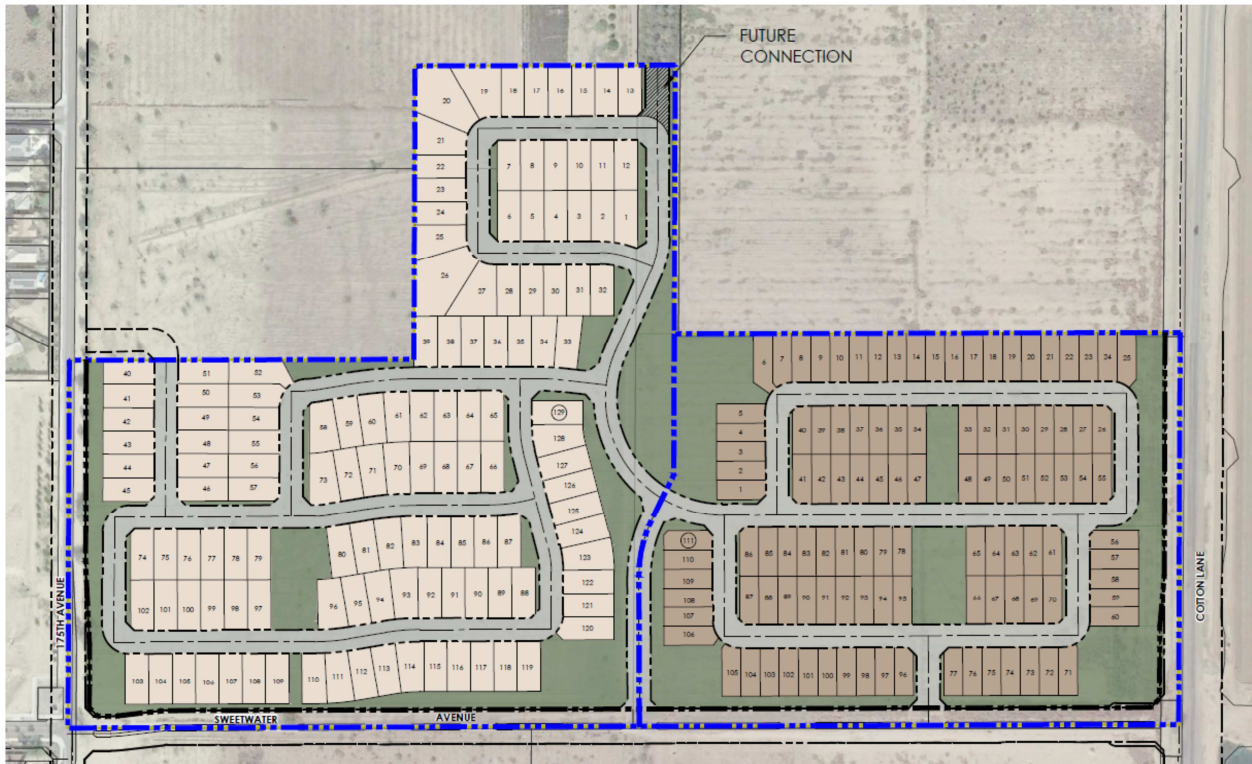
Analysis and Discussion:

The subject zone change request contemplates a change from RR to two (2) separate zoning districts, RM-6 and RM-9, each with a PUD Overlay. The following image, taken from Figure 2 of the zoning narrative, shows the proposed zoning district boundaries:



The base zoning of the western 37.0 acres will be RM-6, which would allow up to 6 Dwelling Units per Acre (DU/Ac); however, through the PUD Overlay, the developer proposes not more than 135 dwelling units for a gross density of approximately 3.65 DU/Ac. Similarly, the base zoning of the eastern 26.2 acres will be RM-9, which would allow up to 9 DU/Ac; however, the PUD Overlay also caps the lot yield to 117 lots for a density of 4.47 DU/Ac.

As noted previously, a related Zone Change is discussed under separate cover. The following image, taken from Figure 2 of the proposed zoning narrative depicts the anticipated lotting for the project. This lotting configuration is expressed in the subject Preliminary Plat which follows.



Unlike typical “PAD” zoning, the subject request falls under the current SUDC. As such, the uses associated with the proposed zoning district are per Section 122-43 of the SUDC. The proposed PUD Overlays, however, will allow certain modifications to 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.

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

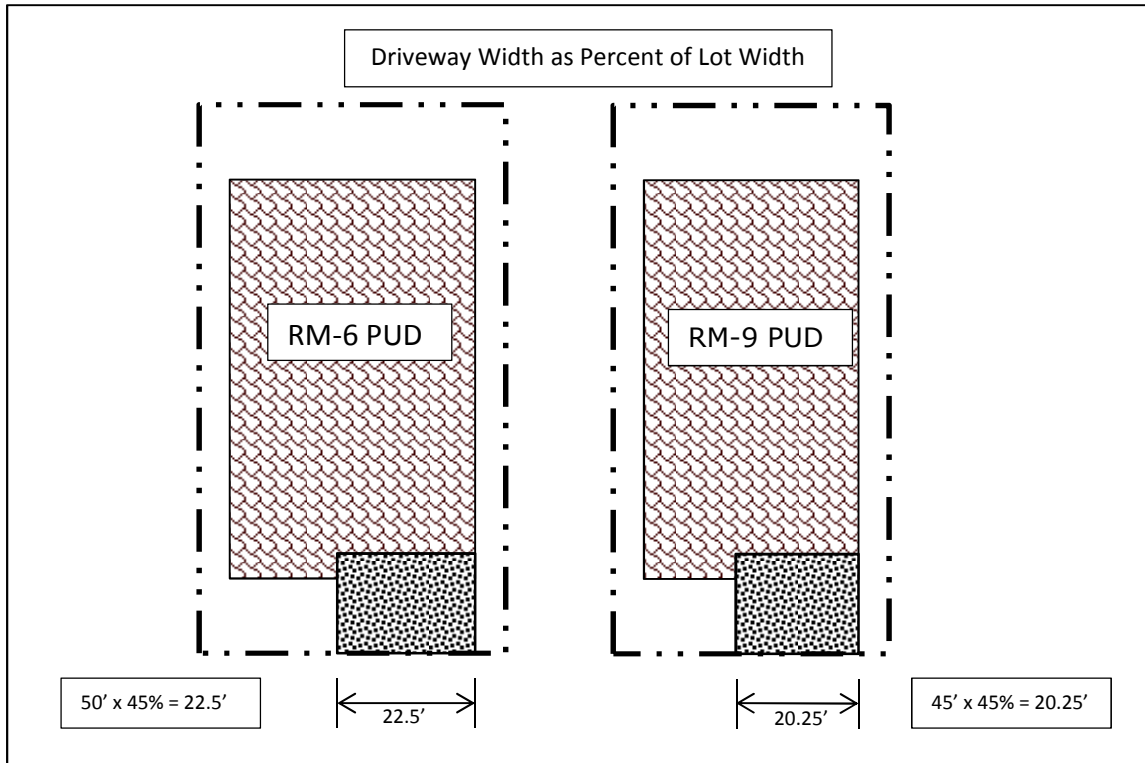
Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Density	6.0	5.0 (decrease in density)	9.0	5.0 (decrease in density)
Minimum Lot Area (sf) (1)	6,000	6,000	4,500	5,000 (increase in lot size)
Minimum Lot Width (ft)	50	50	40	45 (increase in lot width)
Minimum Lot Depth (ft)	100	100	100	100
Minimum Front Yard Setback (ft) (livable area/front-facing garage)	12/20	12/20	12/20	12/20
Minimum Side Yard Setback (ft)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft)	20	20	20	20
Maximum Building Height (ft)	35	35	35	35

As noted in the narrative, Section 122-137(r) of the SUDC requires a community swimming pool for Medium Density Residential projects of 60 or more units. The applicant proposes the deletion of this requirement through the PUD Overlay. The rationale being that as a single-family development with 20’ rear setbacks, ample space will be available on each lot to accommodate a private pool should that homeowner chose to do so. Staff does not object to the deletion of the pool requirement.

The applicant also proposes altering the perimeter open space configuration from that required by the SUDC. Section 122-137(e)(1)a requires an open space tract of not less than 60’ in width adjacent to arterials and parkways. The applicant proposes an average width of 60’, which is borne out in the associated Preliminary Plat. The applicant further proposes the deletion of the requirement to orient perimeter houses along a single-loaded street. Staff does not object to either of these provisions.

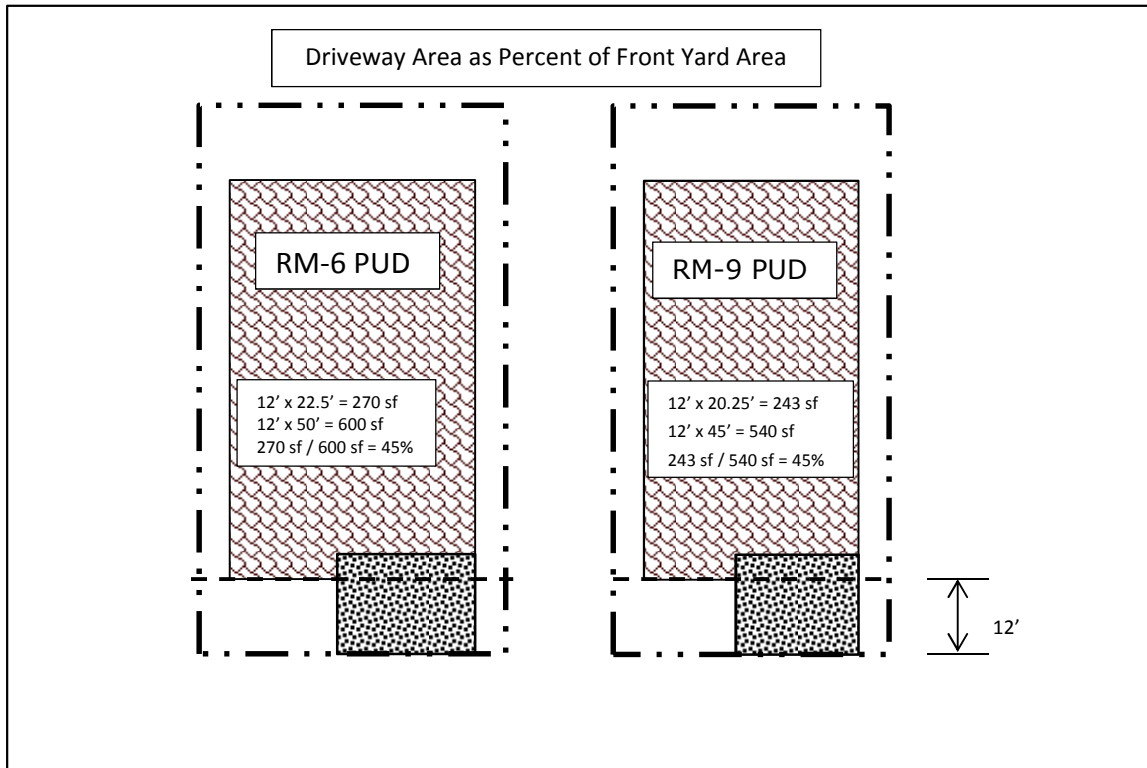
Section 122-137(p)(1) requires one (1) turf recreational field per 700 residential units, each field to have a minimum turf area of not less than 3.5 acres. The applicant proposes the removal of the 3.5 acre minimum size requirement, based on the proportional size of the field relative to the proposed development. Staff does not object to the removal of the 3.5 acre requirement.

Also, there is a provision in the current SUDC which limits the width of a residential driveway to 30% of the lot's width. The proposed minimum lot width is 50' for the RM-6 portion and 45' for the RM-9 portion. If limited to 30%, the driveways would only be 15' and 13.6' wide, respectively. Since a typical garage is 20' wide, increasing the allowable driveway width from 30% to some higher number make sense. The applicant proposes 45%, which would allow for a 22.5' wide driveway in the RM-6 portion, and 20.25' in the RM-9 portion.



There is also a provision in the current SUDC which limits the area of a residential driveway to 30% of the required front yard area, which is that area located between the front setback line and the front lot line. Again, the proposed minimum lot widths are 50' and 45', while the proposed minimum front setback is 12'. 30% of the resulting area will not accommodate a driveway; however, increasing to 45% will accommodate the proposed driveway widths.

[Continued following page.]



235
236

237 The SUDC requires that not less than 20% of the “net residential acreage” be set aside as open
 238 space. The net residential acreage is essentially the total amount of land taken up by the individual
 239 lots combined with the total open space. The applicant proposes an increase to 24% of the net
 240 residential area as open space overall, which exceeds the 20% requirement set forth in the SUDC.
 241 Within that open space will be a pocket park with tot-lot, ramada, picnic area, turf play area, and
 242 landscaping.

243

244 **Utility and Services Table:**

245

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

246
247
248
249
250
251

[Continued following page.]

252 **Conformance with Adopted Plans:**

253
254 **Surprise General Plan 2035:** The Surprise General Plan 2035 shows the subject property as lying
255 within the Neighborhood Character Area, which supports residential development of up to 8 DU/Ac
256 or more, provided appropriate transitions are made between the various Neighborhood types
257 included within the character area. The subject proposal contemplates up to 252 dwelling units,
258 which equates to 4.0 DU/Ac overall. As such the proposed zoning most closely aligns with the
259 Suburban Neighborhood type and is consistent with the General Plan.

260
261 **Reviewing Agencies:**

262
263 **Luke Air Force Base (LAFB):** In a letter dated October 12, 2017, LAFB indicated the proposed
264 development met their Graduated Density Concept and would not interfere with flight operations,
265 but requested a robust notification program.

266
267 **Arizona Department of Transportation (ADOT):** In an email dated October 4, 2017, ADOT
268 indicated no concerns.

269
270 **Maricopa Water District (MWD):** In an email dated October 4, 2017 (attached), MWD indicated
271 the proposed development would impact their facilities. Stipulations to address these concerns are
272 included in the associated Preliminary Plat approval, discussed under separate cover.

273
274 **Summary:**

275
276 The applicant seeks a Zone Change over the subject property, and seeks relief from certain aspects
277 of the SUDC through the PUD Overlay. Said Zone Change is consistent with the Surprise General
278 Plan and the rationale for the granting of the PUD Overlay stems from the developer's commitment
279 to provide not less than 24% open space, which exceeds the minimum requirement of 20%. The
280 proposed development is compatible with the neighboring land uses and the amenities included
281 within the open space will provide recreational opportunities for the neighborhood residents.
282 Further, much needed infrastructure will be constructed as part of this development.

283
284 **Findings:**

- 285
- 286 • The proposed zone change is consistent with the Surprise General Plan 2035.
 - 287 • The proposed development standards will allow the property to be reasonably developed.
 - 288 • There are no objections to the request.
- 289
290
291
292

293 [Continued following page.]

Recommendation:

Based on the findings noted above, staff recommends the Commission move to recommend **approval** of the subject rezone request to the City Council, subject to stipulations 'a' and 'b' as outlined below:

- a. Development and use of the site shall be consistent with the Preliminary Plat entitled "Rancho TruGold Preliminary Plat" consisting of seven (7) sheets prepared by David Evans & Associates, Inc. dated December 18, 2017 and stamped received December 21, 2017.
- b. Landscaping of the development shall be consistent with the Preliminary Landscape Plans entitled "Rancho TruGold Preliminary Landscape Plan", consisting of seven (7) sheets prepared by LVA Urban Design Studio, dated December 18, 2017 and stamped received December 21, 2017.
- c. The applicant shall construct full roadway improvements adjacent to their property including curb, gutter, sidewalk and raised landscape medians. This requires off-site transition tapers from the existing roadway to the newly widened 175th Avenue. Since there is no right-of-way adjacent to the Heritage Farm parcel, the applicant is required to pay all costs associated with obtaining the necessary right-of-way for the 175th Avenue off-site tapers via dedication, condemnation, or construction easements.
- d. Prior to Final Plat approval, the developer shall provide written evidence of an executed Development Agreement between the developer and the Maricopa Water District relating to the subject property and shall obtain approval from the Maricopa Water District with respect to the development's effect on MWD facilities.
- e. 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.

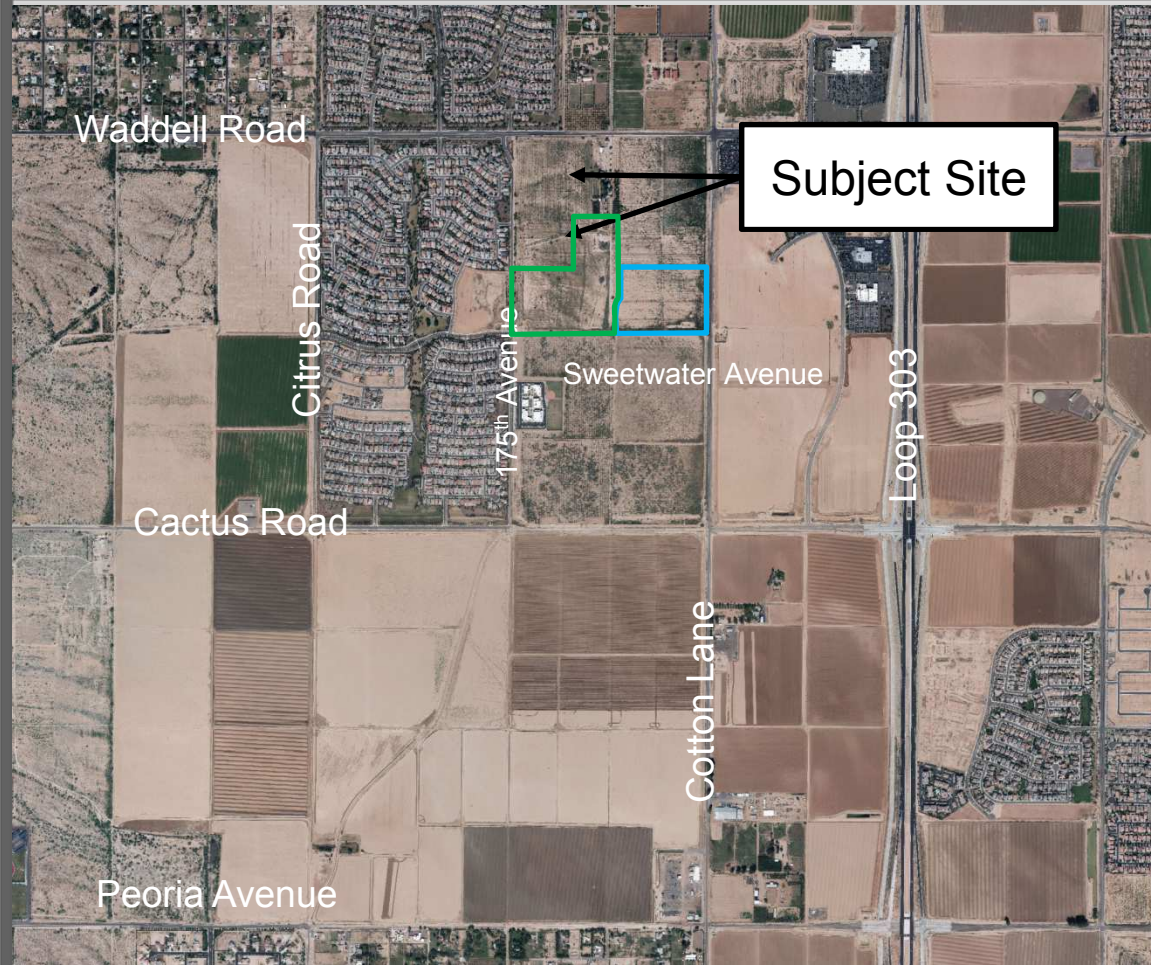
However, should the Commission wish to recommend denial of the request, the Commission should make its own findings and base its decision on those alternative findings.

Attachments:

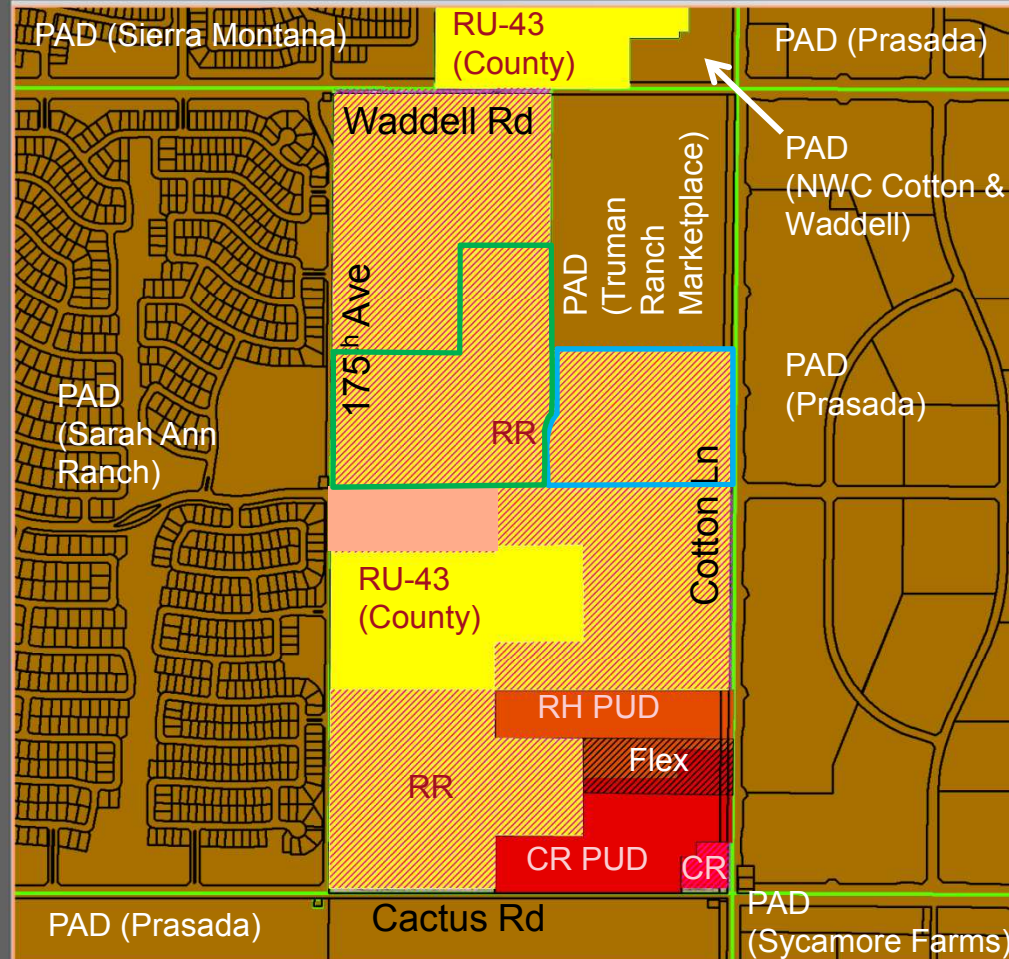
- 01 Vicinity Map
- 02 Case Map
- 03 Preliminary Plat
- 04 Preliminary Landscape Plans
- 05 MWD comments

Heritage Farm

Vicinity Map



Zone Change



- Existing County RU-43 Zoning
- Existing Surprise RR Zoning*
- Existing Surprise RM-9 PUD Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise PAD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning
- Existing Surprise CR Zoning*
- Subject Property – Zone Change from RR to RM-9 PUD**
- Subject Property – Zone Change from RR to RM-6 PUD**

*Post-Annexation zoning approved as part of Annexation request under FS16-427

RANCHO TRUGOLD
PRELIMINARY PLAT
SURPRISE, ARIZONA

A PORTION OF THE NORTHEAST QUARTER OF SECTION 14, TOWNSHIP 3
NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER MERIDIAN, MARICOPA
COUNTY, ARIZONA.

LEGAL DESCRIPTION

PARCEL NO. 1:

A PORTION OF THE EAST HALF OF THE NORTHEAST QUARTER OF SECTION 14, TOWNSHIP 3
NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY,
ARIZONA;

EXCEPT THE NORTH 1715.99 FEET THEREOF; AND

EXCEPT THE EAST 83 FEET THEREOF.

PARCEL NO 2:

THE WEST 100 FEET OF THE NORTH 1715.99 FEET OF THE EAST HALF OF THE NORTHEAST
QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER
BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA;

EXCEPT THE NORTH 1083 FEET THEREOF.

PARCEL NO. 3:

THE SOUTH HALF OF THE WEST HALF OF THE NORTHEAST QUARTER OF SECTION 14, TOWNSHIP
3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA
COUNTY, ARIZONA;

EXCEPT ANY PORTION LYING WITHIN PARCEL NO. 4, DESCRIBED BELOW; AND

EXCEPT THE WEST 810 FEET OF THE NORTH 1,775.40 FEET OF THE NORTHEAST QUARTER OF
SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND
MERIDIAN, MARICOPA COUNTY, ARIZONA;

EXCEPT THE NORTH HALF OF THE WEST HALF OF THE NORTHEAST QUARTER OF SAID SECTION
14.

PARCEL NO. 4:

A PORTION OF THE EAST HALF OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE
GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA COUNTY, ARIZONA, MORE PARTICULARLY
DESCRIBED AS FOLLOWS:

COMMENCING AT THE NORTH QUARTER CORNER OF SAID SECTION 14, MONUMENTED BY A 3
INCH MARICOPA COUNTY HIGHWAY DEPARTMENT BRASS CAP FLUSH, STAMPED WITH AN "X", FROM
WHICH THE SOUTH QUARTER CORNER OF SAID SECTION 14, MONUMENTED BY A 1 INCH IRON
BAR BEARS, AS A BASIS OF BEARINGS, SOUTH 00 DEGREES 23 MINUTES 49 SECONDS WEST, A
DISTANCE OF 5,281.13 FEET;

THENCE SOUTH 00 DEGREES 23 MINUTES 49 SECONDS WEST ALONG THE NORTH-SOUTH
MID-SECTION LINE OF SAID SECTION 14, A DISTANCE OF 2,244.32 FEET TO THE TRUE POINT OF
BEGINNING, SAID POINT ALSO BEING THE BEGINNING OF A TANGENT CURVE, CONCAVE EASTERLY,
WHOSE RADIUS POINT BEARS SOUTH 89 DEGREES 36 MINUTES 11 SECONDS EAST, A DISTANCE
OF 150.00 FEET;

THENCE SOUTHERLY ALONG SAID CURVE TO THE LEFT, THROUGH A CENTRAL ANGLE OF 02
DEGREES 57 MINUTES 02 SECONDS, AN ARC DISTANCE OF 7.72 FEET TO A POINT OF TANGENCY;

THENCE SOUTH 02 DEGREES 33 MINUTES 13 SECONDS EAST, A DISTANCE OF 186.53 FEET TO
THE BEGINNING OF A TANGENT URVE, CONCAVE WESTERLY, WHOSE RADIUS POINT BEARS SOUTH
87 DEGREES 26 MINUTES 47 SECONDS WEST, A DISTANCE OF 150.00 FEET;

THENCE SOUTHERLY ALONG SAID CURVE TO THE RIGHT, THROUGH A CENTRAL ANGLE OF 02
DEGREES 57 MINUTES 02 SECONDS, AN ARC DISTANCE OF 7.72 FEET TO A POINT OF TANGENCY
ON A LINE PARALLEL WITH AND 10.00 FEET EASTERLY OF THE NORTH-SOUTH MID-SECTION LINE
OF SAID SECTION 14;

THENCE SOUTH 00 DEGREES 23 MINUTES 49 SECONDS WEST ALONG SAID PARALLEL LINE, A
DISTANCE OF 194.79 FEET TO A POINT ON THE EAST-WEST MID-SECTION LINE OF SAID SECTION
14;

THENCE SOUTH 89 DEGREES 59 MINUTES 54 SECONDS WEST ALONG SAID EAST-WEST
MID-SECTION LINE, A DISTANCE OF 10.00 FEET TO A POINT ON THE NORTH-SOUTH MID-SECTION
LINE OF SAID SECTION 14;

THENCE NORTH 00 DEGREES 23 MINUTES 49 SECONDS EAST ALONG SAID NORTH-SOUTH
MID-SECTION LINE, A DISTANCE OF 396.59 FEET TO THE TRUE POINT OF BEGINNING.

PARCEL NO. 5:

THE NORTH HALF OF THE WEST HALF OF THE NORTHEAST QUARTER OF SECTION 14, TOWNSHIP
3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN, MARICOPA
COUNTY, ARIZONA;

EXCEPT THE WEST 810 FEET THE NORTH HALF OF THE WEST HALF OF THE NORTHEAST
QUARTER OF SECTION 14, TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER
BASE AND MERIDIAN, MARICOPA COUNTY,
ARIZONA;

EXCEPT THE NORTH 1083 FEET THEREOF.

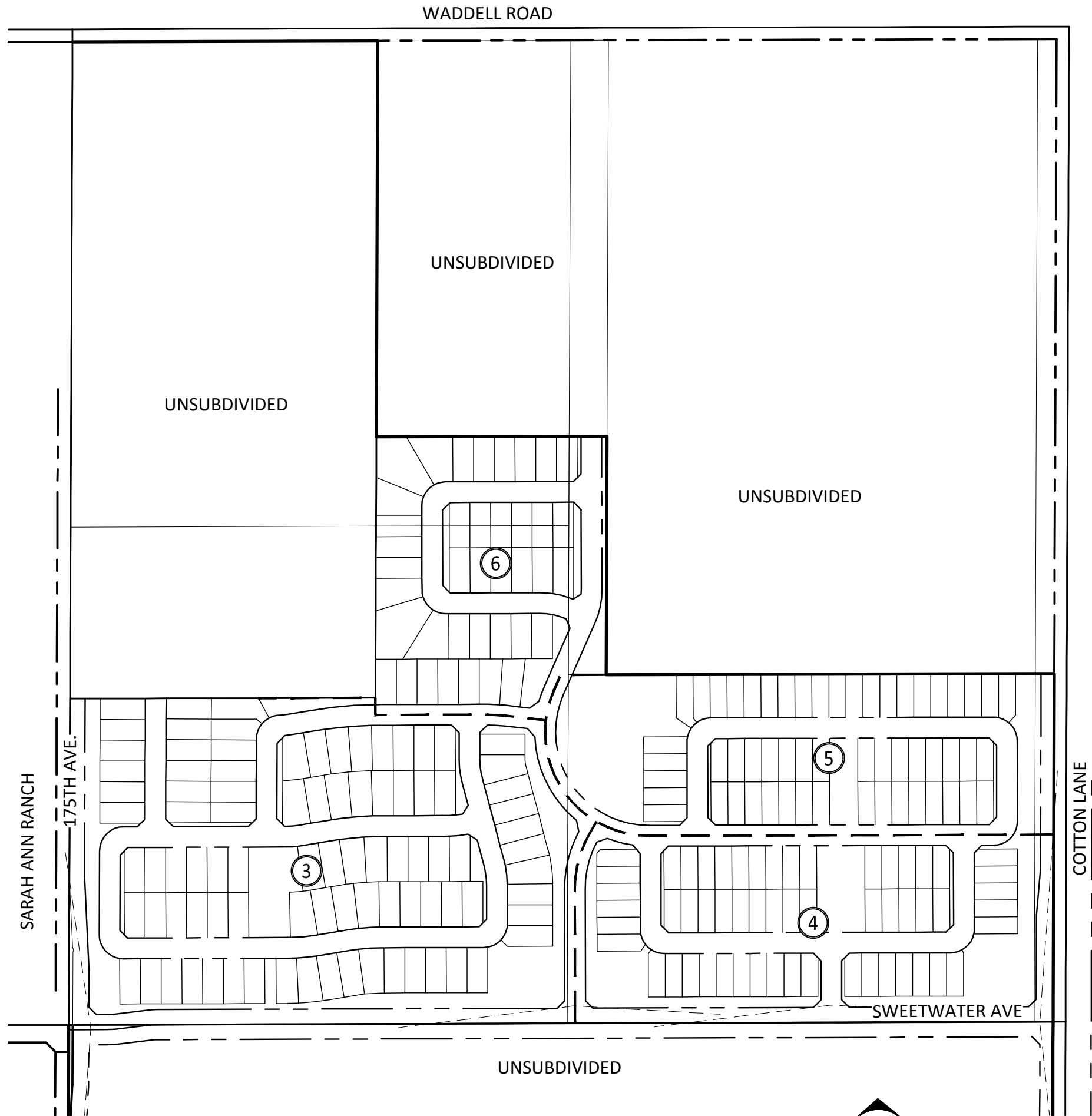
LEGAL DESCRIPTION (CONTINUED)

PARCEL NO. 6:

THAT CERTAIN PARCEL RECORDED IN DOCUMENT 2007-0615471 OF M.C.R., BEING A 50.00 FOOT
WIDE STRIP SITUATED IN THE EAST HALF OF THE NORTHEAST QUARTER OF SECTION 14,
TOWNSHIP 3 NORTH, RANGE 2 WEST OF THE GILA AND SALT RIVER BASE AND MERIDIAN,
MARICOPA COUNTY, ARIZONA;

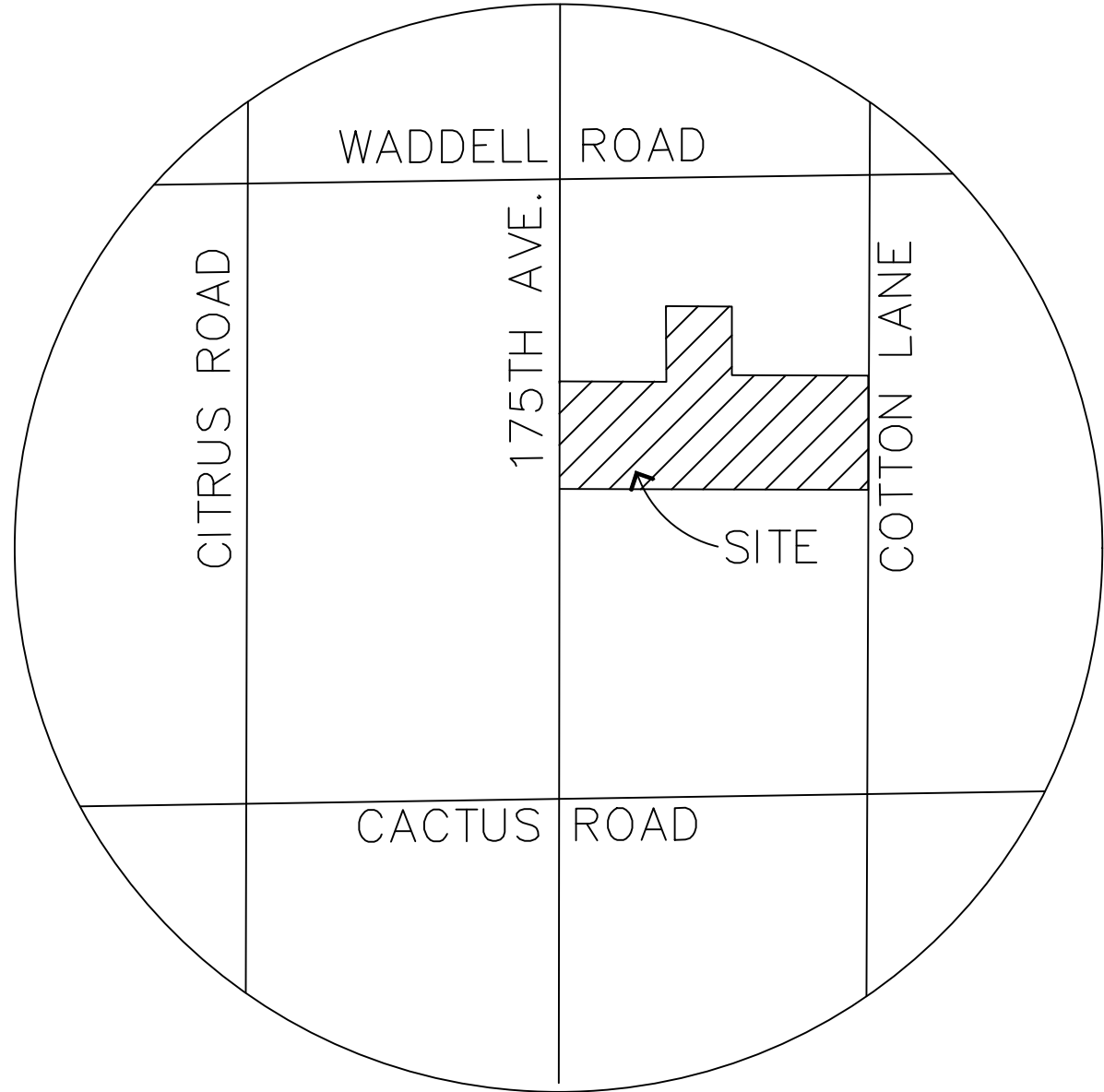
EXCEPT THE NORTH 1,715.99 FEET; AND ALSO

EXCEPTING AND RESERVING, UNTO THE GRANTOR, ITS SUCCESSORS AND ASSIGNS, ALL OF THE
COAL, OIL,
GAS, CASING-HEAD GAS AND ALL ORES AND MINERALS OF EVERY KIND AND NATURE, INCLUDING
SAND AND
GRAVEL UNDERLYING THE SURFACE OF THE PROPERTY, TOGETHER WITH THE FULL RIGHT,
PRIVILEGE AND LICENSE AT
ANY AND ALL TIMES TO EXPLORE, OR DRILL FOR AND TO PROTECT, CONSERVE, MINE, TAKE,
REMOVE AND MARKET
ANY AND ALL SUCH PRODUCTS IN ANY MANNER WHICH WILL NOT DAMAGE STRUCTURES ON THE
SURFACE OF THE
PROPERTY, PROVIDED, HOWEVER, THAT GRANTOR EXPRESSLY WAIVES ANY RIGHT TO USE THE
SURFACE OR THE
FIRST ONE HUNDRED (100) FEET OF THE SUBSURFACE OF THE PROPERTY TO EXPLORE FOR THE
MINERALS HEREIN
RESERVED.



KEY MAP

SCALE: 1"=300'



VICINITY MAP

SECTION 14, T3N, R2W
NTS

SITE DATA

EXISTING ZONING: RR
PROPOSED ZONING: RM-6 PUD, RM-9 PUD
GROSS AREA: 63.18 AC
NET AREA: 59.22 AC
LOT COUNT: 240 LOTS
GROSS DENSITY: 3.8 DU/AC
RM-6 PUD DENSITY: 3.65 DU/AC
RM-9 PUD DENSITY: 4.47 DU/AC
OPEN SPACE AREA: 11.77 AC

Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Density	6.0	5.0 (decrease in density)	9.0	5.0 (decrease in density)
Minimum Lot Area (sf) (1)	6,000	6,000	4,500	5,000 (increase in lot size)
Minimum Lot Width (ft)	50	50	40	45 (increase in lot width)
Minimum Lot Depth (ft)	100	100	100	100
Minimum Front Yard Setback (ft) (livable area/ front-facing garage)	12/20	12/20	12/20	12/20
Minimum Side Yard Setback (ft)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft)	20	20	20	20
Maximum Building Height (ft)	35	35	35	35

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.

OWNER

JOHN C. AND HELEN G. TRUMAN TRUST
PO BOX 145
WADDELL, AZ 85355
CONTACT: JAMES S. TRUMAN
PHONE: (602) 320-3355

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 DETAILS AND SECTIONS
3-6 PRELIMINARY PLAT
7 STRIPING DETAILS

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
--- ELECTRICAL
--- GAS
--- SANITARY SEWER
--- TELEPHONE
--- WATER
--- OVERHEAD ELECTRIC
--- FLOW LINE
--- STORM DRAIN
--- SEWER MANHOLE
--- UTILITY POLE / RISER
--- CATCH BASIN
--- STORM DRAIN MANHOLE
--- SIGN
--- FIRE HYDRANT
--- GRADE BREAK
--- SVE SIGHT VISIBILITY EASEMENT
--- SDE SIGHT DISTANCE EASEMENT
--- PUE PUBLIC UTILITY EASEMENT
--- MATCH LINE

DESIGNED BY: JCF
DRAWN BY: JCF
CHECKED BY: RYG
DATE: 12/2017

PROJECT MANAGER: RAMZI GEORGES, P.E.

DAVID EVANS AND ASSOCIATES INC.
4600 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

REGISTERED PROFESSIONAL ENGINEER
No. 37287
RAMZI GEORGES
Signed 12/18/17
Arizona U.S.A.

EXPIRES: 3/31/2020

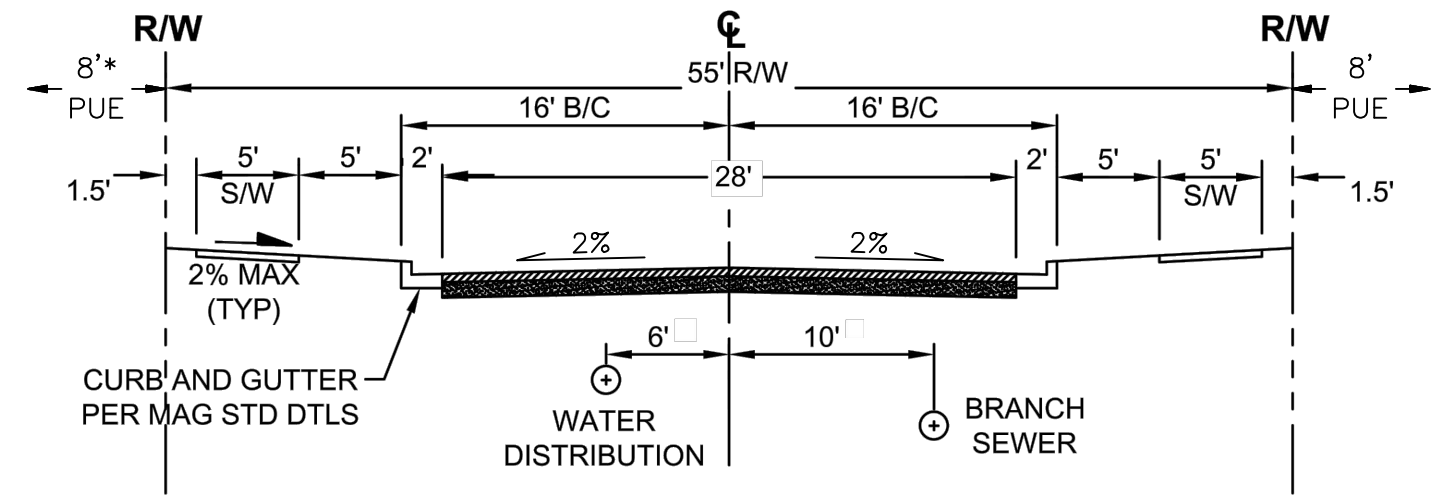
PRELIMINARY PLAT
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

CASE #:
FS17-583

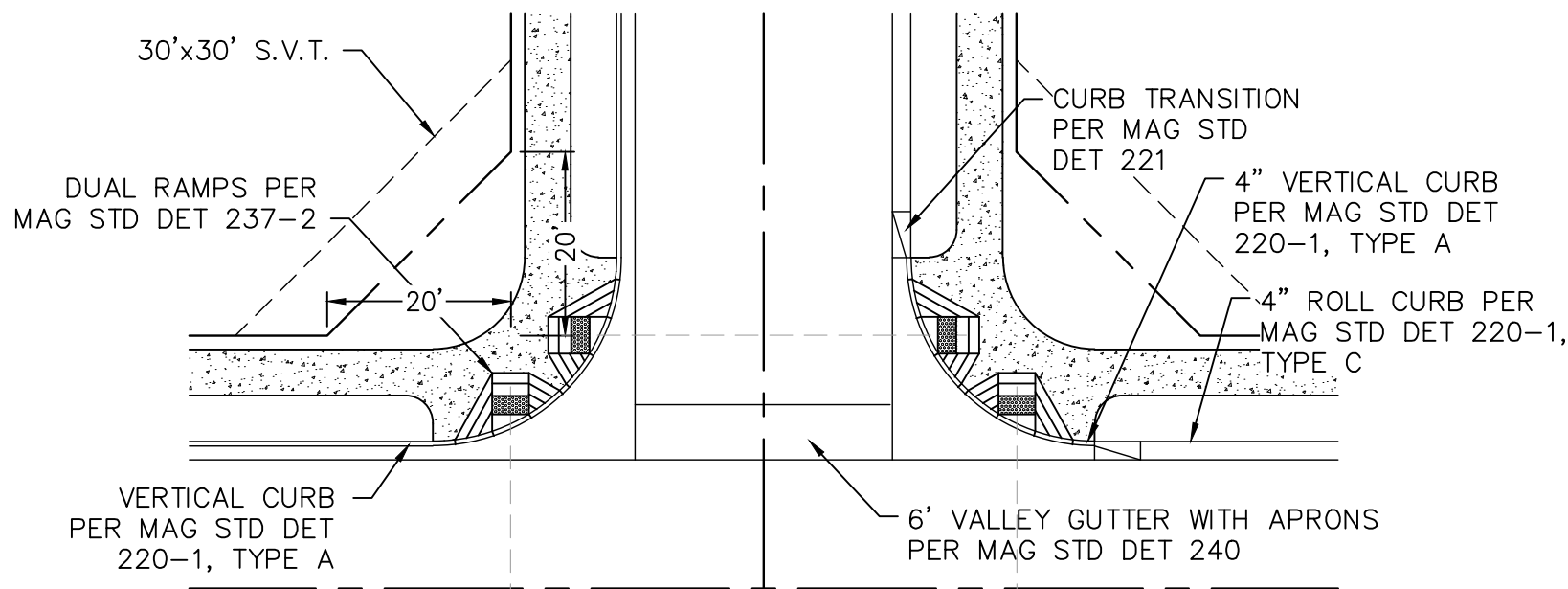
SECTION: 14
TWNSHP: 3N
RANGE: 2W

JOB NO.:
JCHG0001

SHEET
1 OF 7

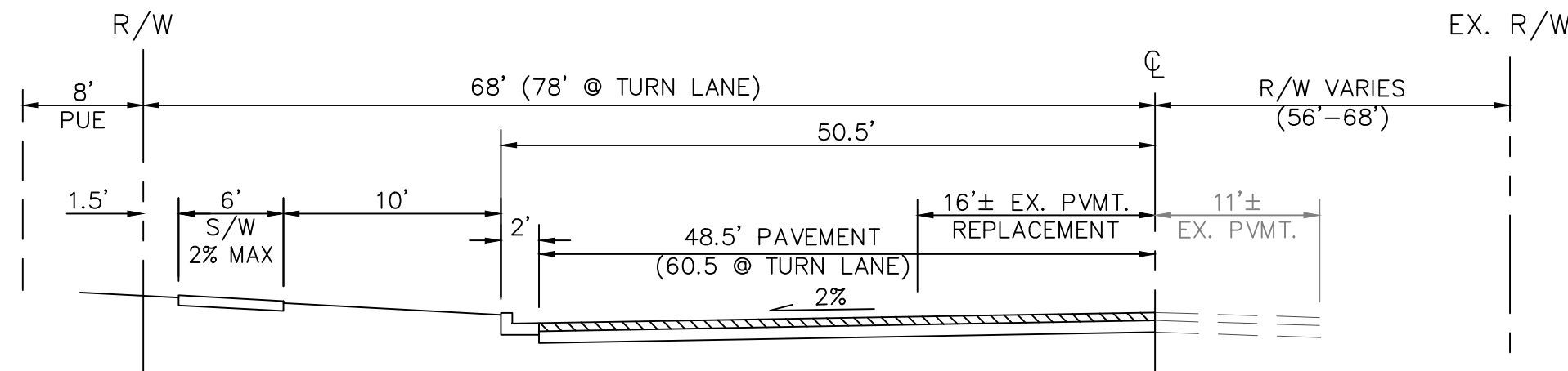


LOCAL STREET
LOOKING NORTH / EAST

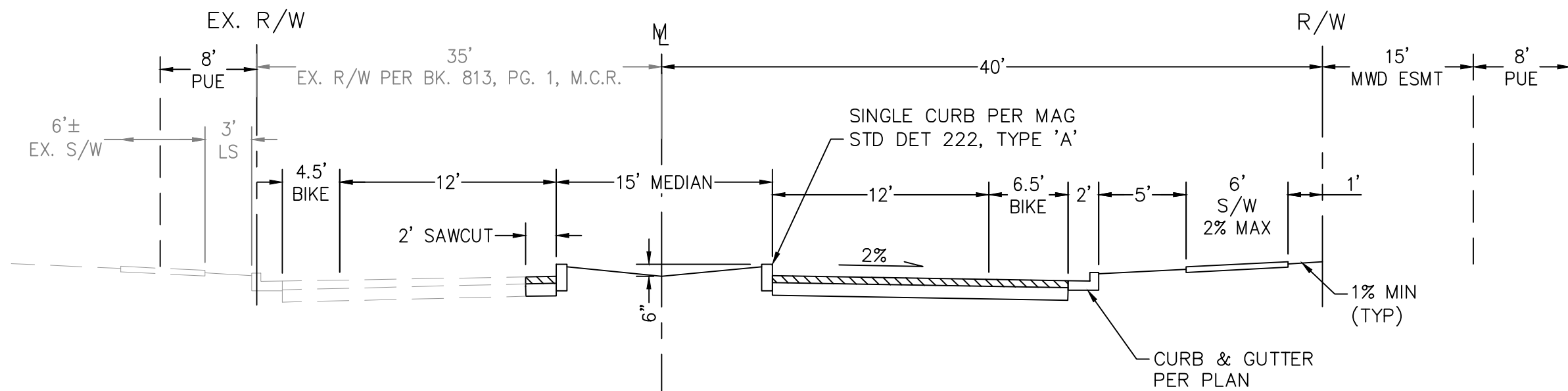


TYPICAL T-INTERSECTION GEOMETRY

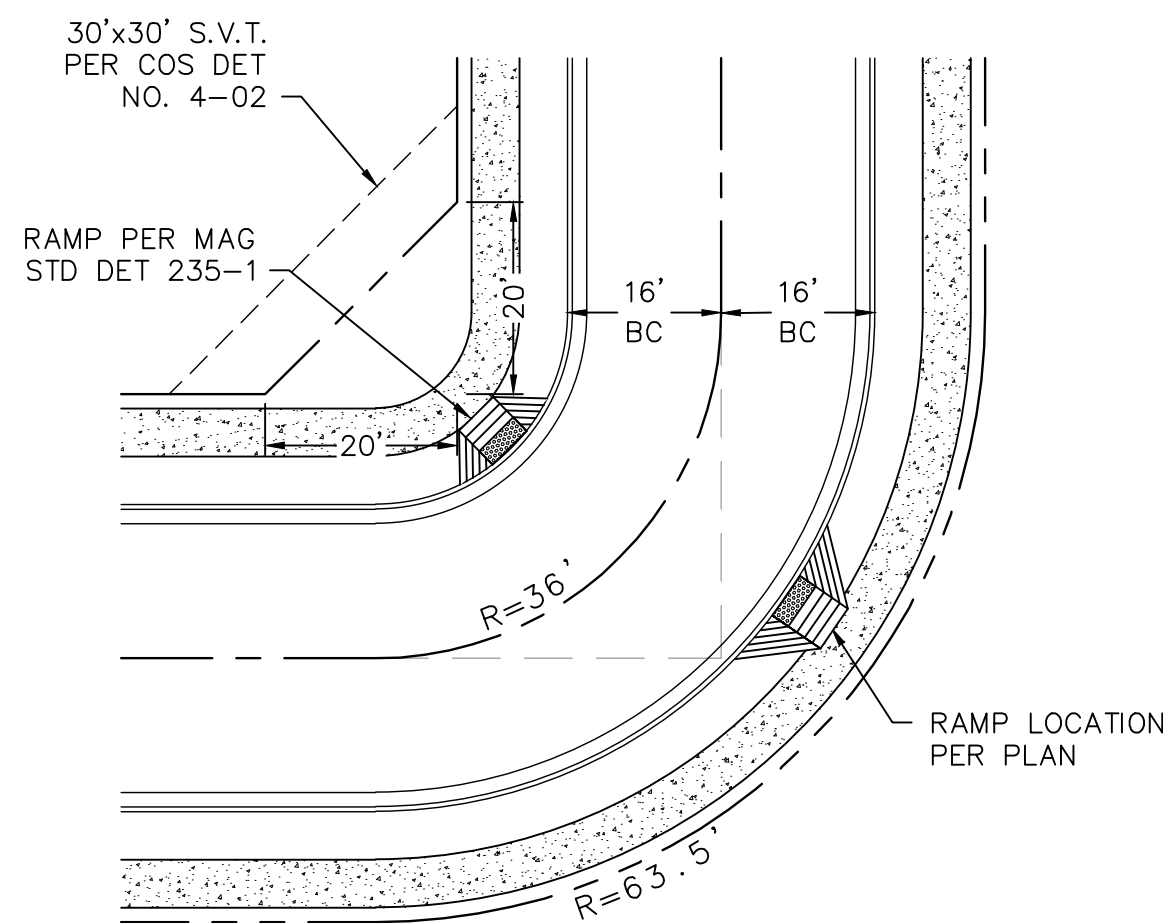
LOCAL RESIDENTIAL STREETS
1"=20'



COTTON LANE
(MAJOR ARTERIAL)
LOOKING NORTH

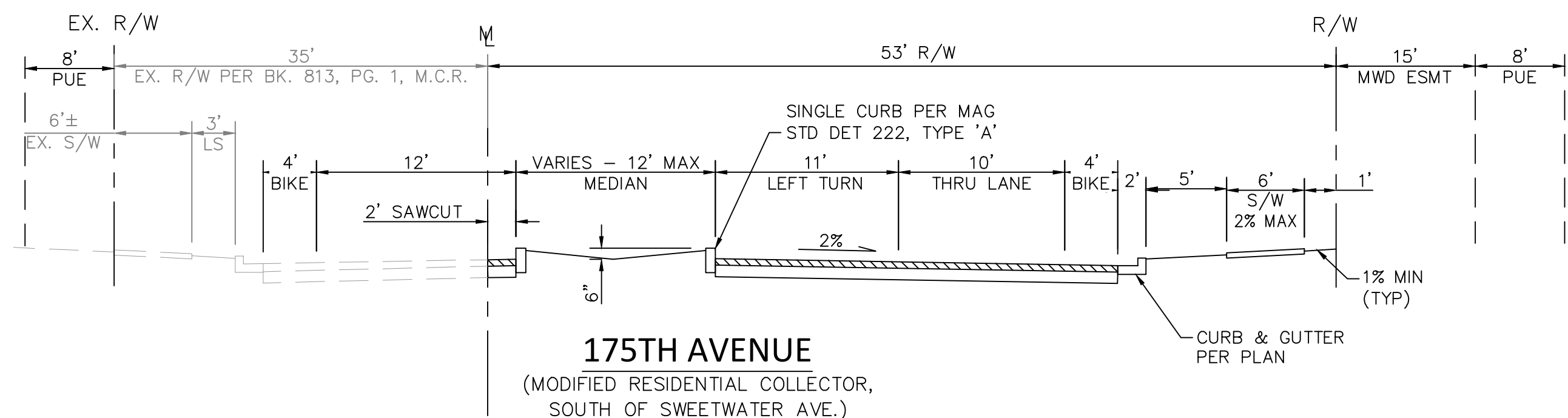


175TH AVENUE
(RESIDENTIAL COLLECTOR, TYPICAL)
LOOKING NORTH

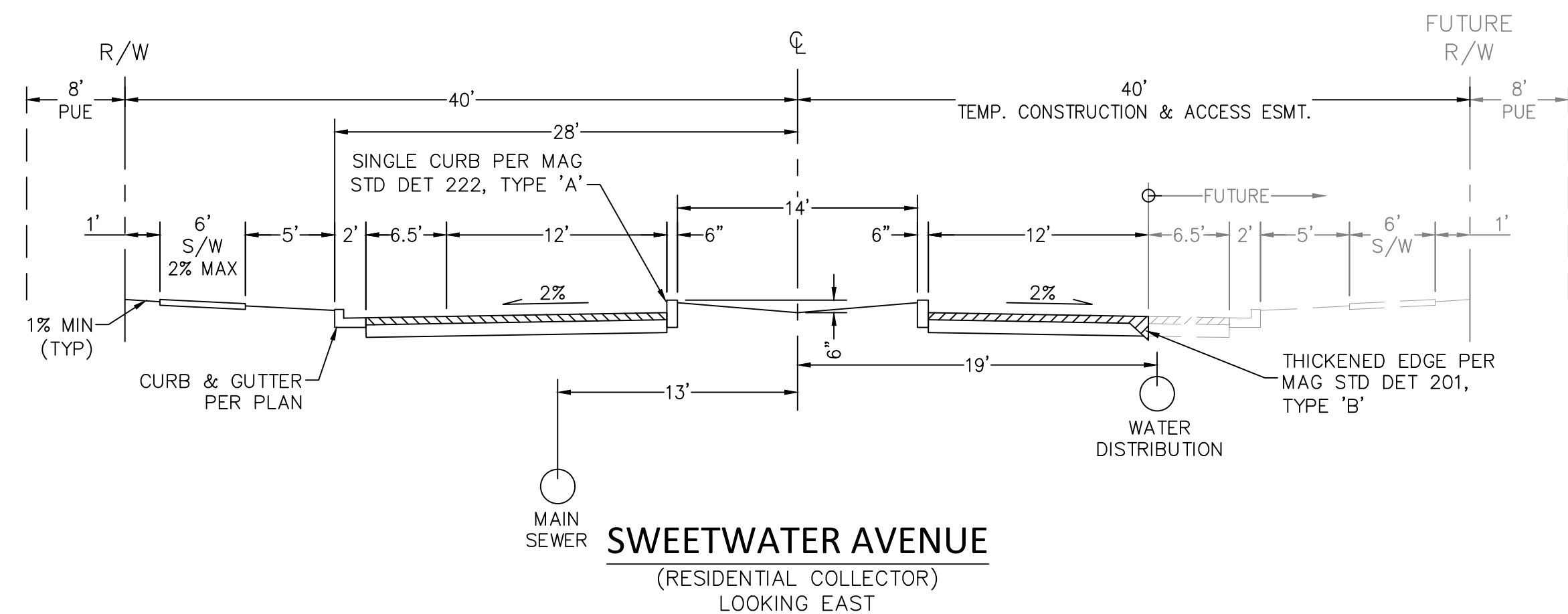


TYPICAL ELBOW GEOMETRY

1"=20'



175TH AVENUE
(MODIFIED RESIDENTIAL COLLECTOR,
SOUTH OF SWEETWATER AVE.)
LOOKING NORTH



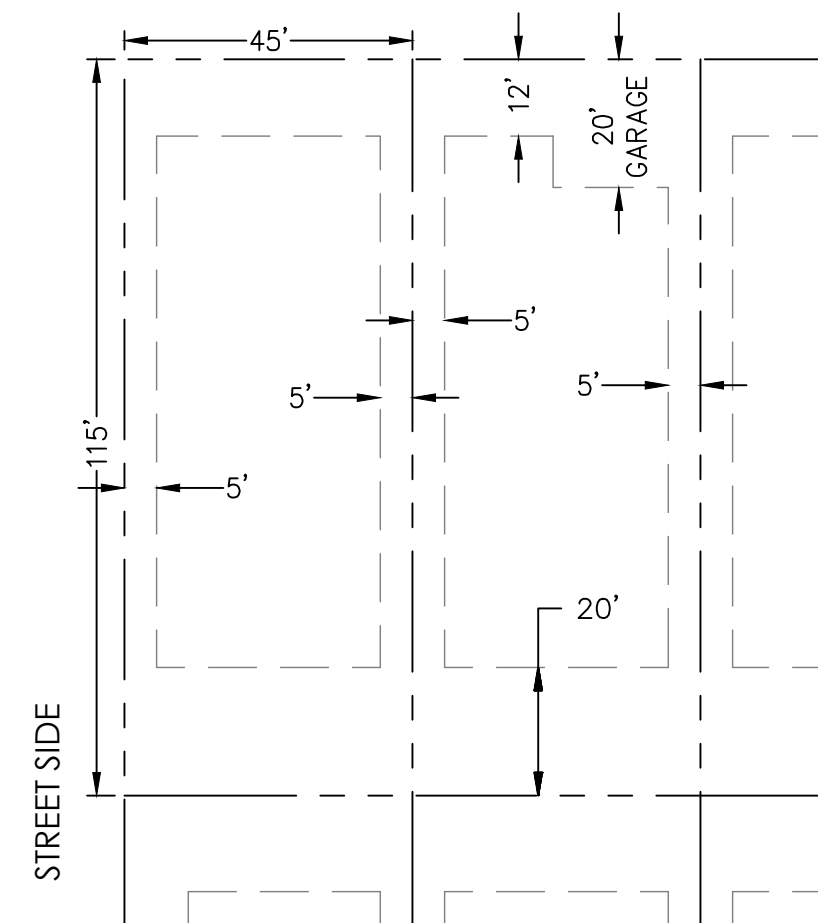
SWEETWATER AVENUE
(RESIDENTIAL COLLECTOR)
LOOKING EAST

TRACT TABLE

TRACT TABLE		
TRACT NAME	AREA (AC)	PURPOSE
A	3.050	OPEN SPACE, DRAINAGE, WATER EASEMENT, SEWER EASEMENT, AND COMMUNITY AMENITIES
B	0.680	OPEN SPACE, DRAINAGE, AND COMMUNITY AMENITIES
C	0.215	OPEN SPACE AND COMMUNITY AMENITIES
D	0.265	OPEN SPACE AND COMMUNITY AMENITIES
E	2.514	OPEN SPACE, DRAINAGE, AND COMMUNITY AMENITIES
F	0.048	OPEN SPACE AND COMMUNITY AMENITIES
G	0.074	OPEN SPACE AND COMMUNITY AMENITIES
H	0.085	OPEN SPACE AND COMMUNITY AMENITIES
I	0.109	OPEN SPACE AND COMMUNITY AMENITIES
J	0.052	OPEN SPACE AND COMMUNITY AMENITIES
K	0.088	OPEN SPACE AND COMMUNITY AMENITIES
L	0.110	OPEN SPACE AND COMMUNITY AMENITIES
M	0.024	OPEN SPACE AND COMMUNITY AMENITIES
N	1.124	OPEN SPACE, DRAINAGE, AND COMMUNITY AMENITIES
O	2.084	OPEN SPACE, DRAINAGE EASEMENT, WATER EASEMENT, AND COMMUNITY AMENITIES
P	0.676	OPEN SPACE, DRAINAGE, AND COMMUNITY AMENITIES
Q	0.396	OPEN SPACE, DRAINAGE, AND COMMUNITY AMENITIES
R	0.036	OPEN SPACE AND COMMUNITY AMENITIES
S	0.046	OPEN SPACE AND COMMUNITY AMENITIES
T	0.036	OPEN SPACE AND COMMUNITY AMENITIES
U	0.036	OPEN SPACE AND COMMUNITY AMENITIES

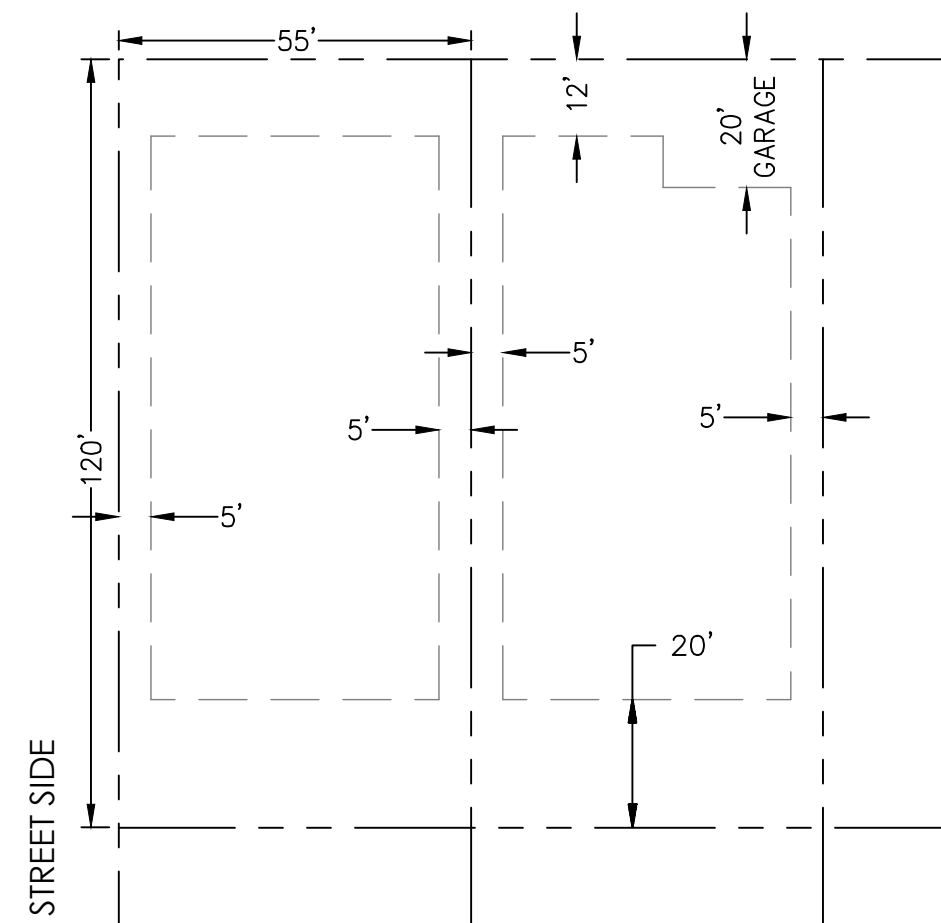
NOTE:
INDIVIDUAL LOT TABLES TO BE PROVIDED ON FINAL PLAT.

45' X 115' LOT SIZE (5,157 S.F.)
RM-9 PUD
FRONT STREET



FRONT:	12'
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	20'

55' X 120' LOT SIZE (6,600 S.F.)
RM-6 PUD
FRONT STREET



FRONT:	12'
FRONT TO GARAGE DOOR:	20'
SIDE:	5'
REAR:	20'

PROJECT MANAGER: RAMZI GEORGES, P.E.

DESIGNED BY: JCF
DRAWN BY: JCF
CHECKED BY: RYG
DATE: 12/2017

**DAVID EVANS
AND ASSOCIATES INC.**
4600 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602/6151511

DETAILS & SECTIONS
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

CASE #:
FS17-583

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W

JOB NO.:
JCHG0001

SHEET
2 OF 7



P:\CHG00000001\0400CAD\PL\CHG000001.dwg jcf Dec 18, 2017 10:58:07am

W. WADDELL ROAD

N 1/4 COR. SEC. 14
T3N, R2W, G&SRM
FD BRASS CAP

NOT A PART

MATCH SHEET 6

MATCH SHEET 5

MATCH SHEET 4

NOT A PART

MWD 15' CROSS-CUT
ESMT AND PIPELINE
MCR NO. 2006-0988452

N. 175TH AVENUE

N. 174TH LN.

N. 174TH LN.

N. 174TH LN.

N. 174TH LN.

N. 174TH LN.

N. 174TH LN.

N. 174TH LN.

MWD 40' LATERAL 6
SUBLATERAL D EASEMENT
BK 14, PG 35;
BK 24, PG 3;
BK 287, PGS. 282-287
MCR NO. 2004-1090830

MWD 20' CROSS-CUT
ESMT AND PIPELINE
MCR NO. 2006-0988452
(TO BE REVISED)

53' TEMP.
CONST. &
ACCESS ESMT.

MWD 15' CROSS-CUT
ESMT AND PIPELINE
MCR NO. 2006-0988452

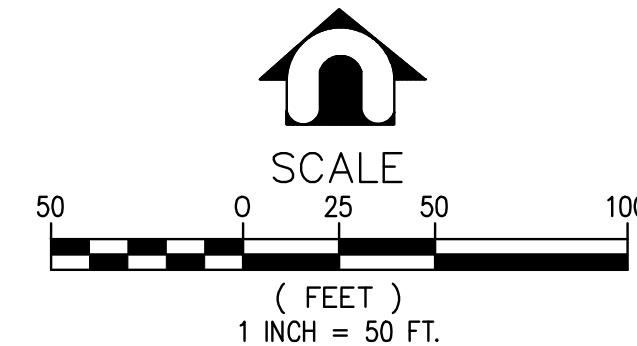
W. CACTUS ROAD

S 1/4 COR. SEC. 14
T3N, R2W, G&SRM
FD BRASS CAP

8' TEMPORARY ELEC EASEMENT
DOC. NO. 2009-0650144, MCR
(TO BE RELEASED)

W. SWEETWATER AVENUE

589°48'53"W 2376.81'



PRELIMINARY PLAT

FOR

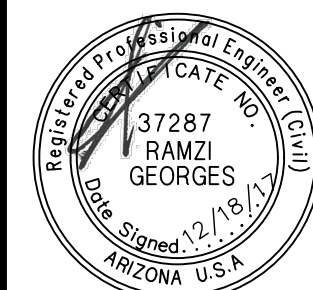
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

CASE #:
FS17-583

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W

JOB NO.:
JCHG0001

SHEET
3 OF 7



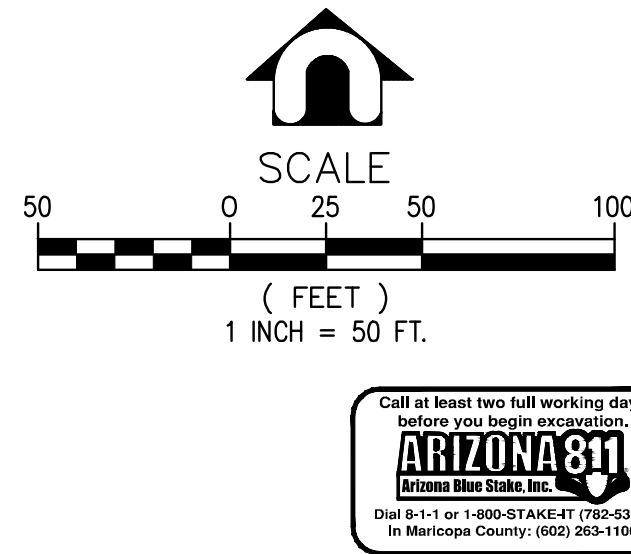
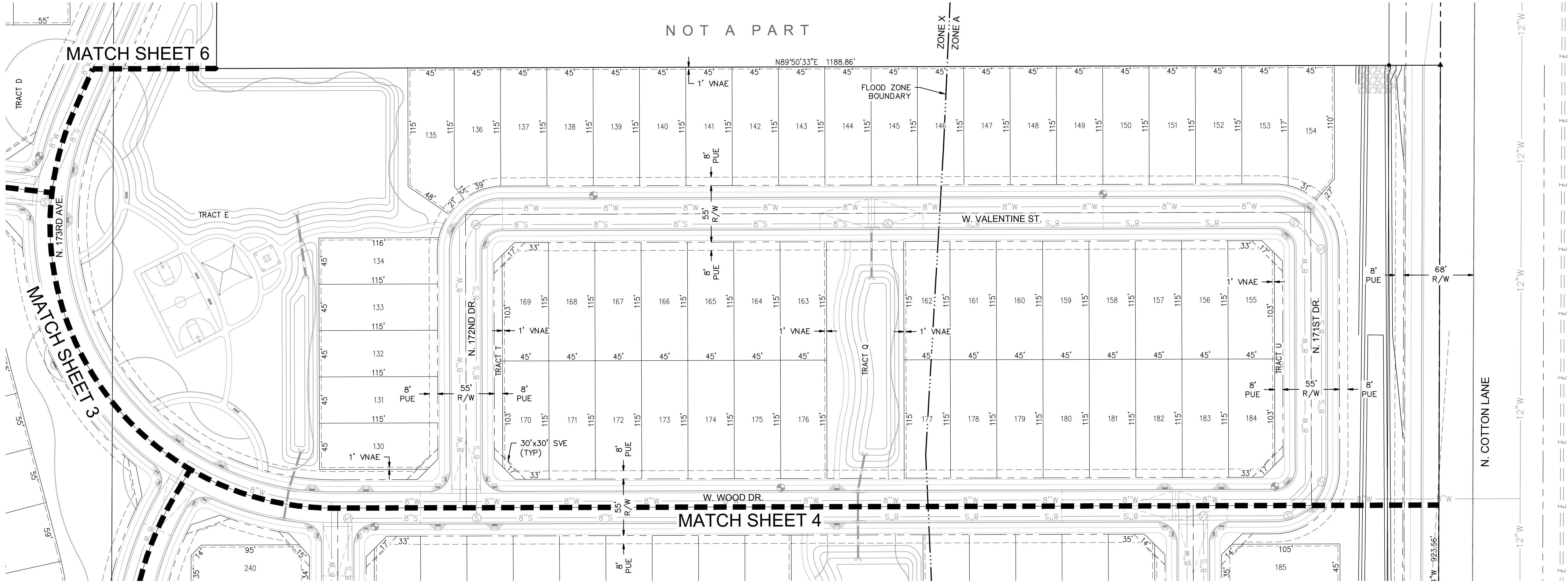
EXPIRES: 3/31/2020

DAVID EVANS, INC.
AND ASSOCIATES, INC.
4600 E Washington Street, Suite 250
Phoenix, Arizona 85034
Phone: 602.678.5151

DESIGNED BY: JCF
DRAWN BY: JCF
CHECKED BY: RYC
DATE: 12/2017

PROJECT MANAGER:
RAMZI GEORGES, P.E.

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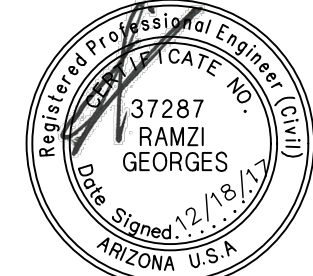
PRELIMINARY PLAT
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

CASE #:
FS17-583

SECTION: 14
TOWNSHIP: 3N
RANGE: 2W

JOB NO.:
JCHG0001

SHEET
5 OF 7



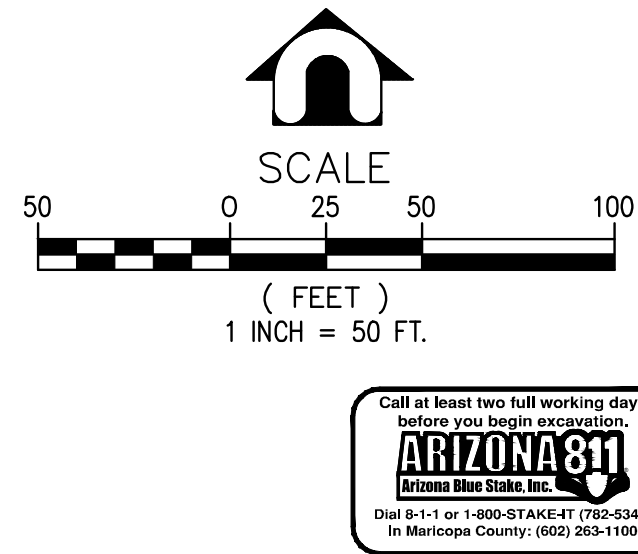
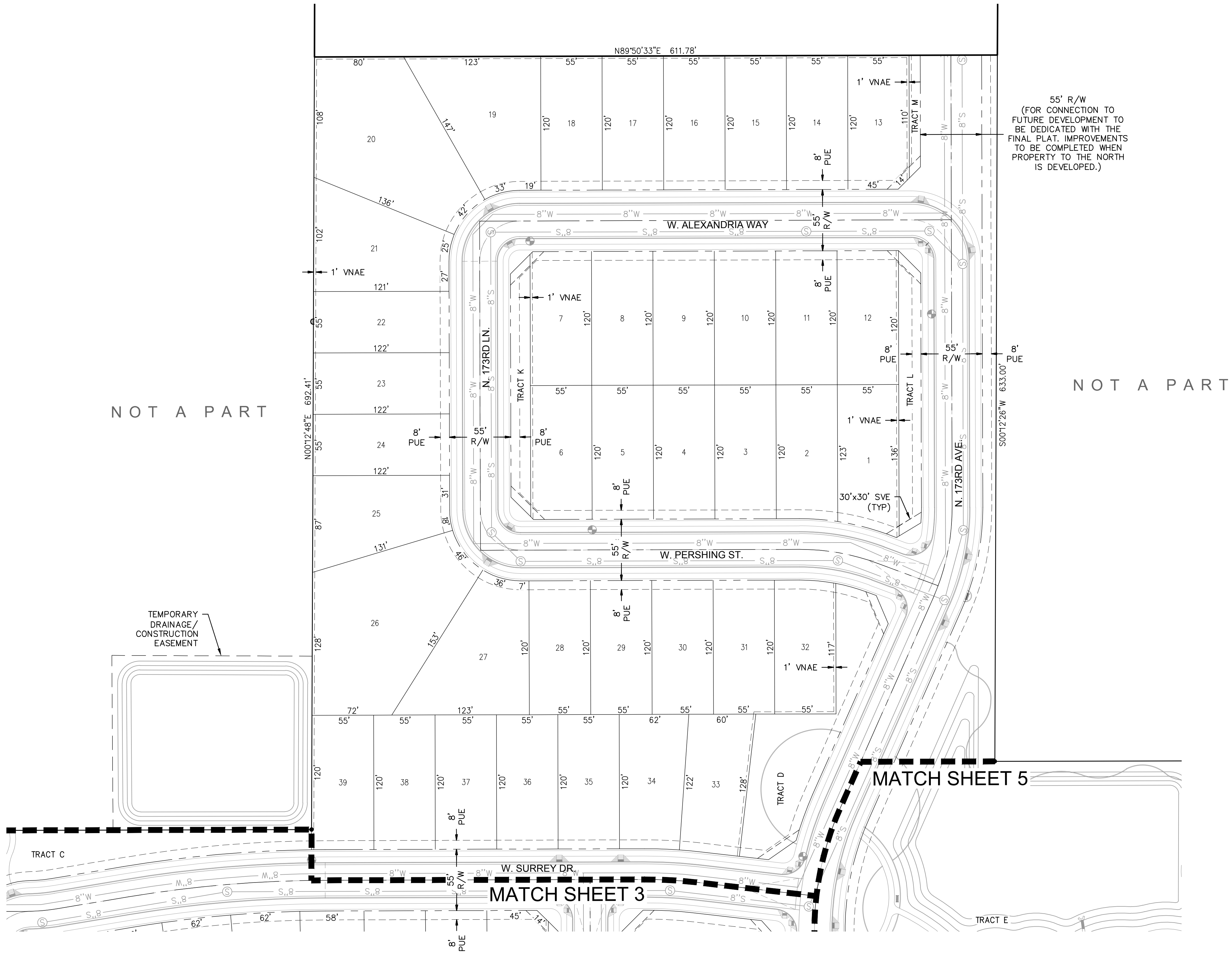
EXPIRES: 3/31/2020

DAVID EVANS INC. AND ASSOCIATES INC.
4600 E Washington Street, Suite 250
Phoenix Arizona 85034
Phone: 602.678.5151

DESIGNED BY: JCF
DRAWN BY: JCF
CHECKED BY: RYC
DATE: 12/2017

PROJECT MANAGER: RAMZI GEORGES, P.E.

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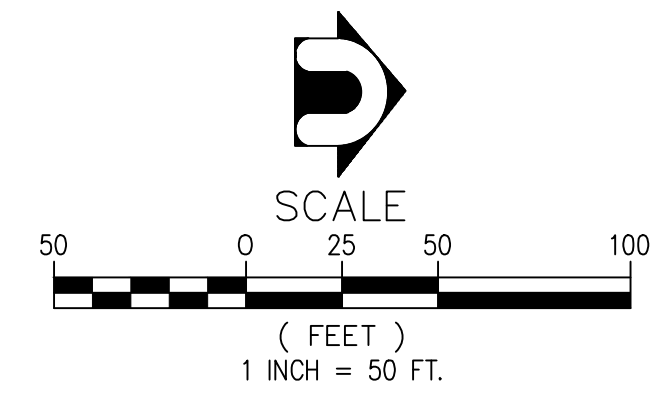
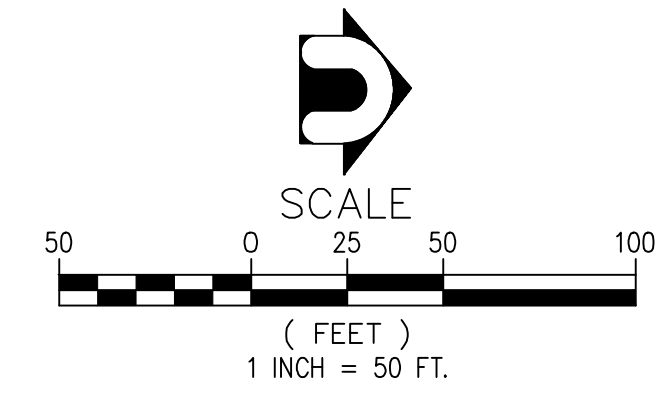
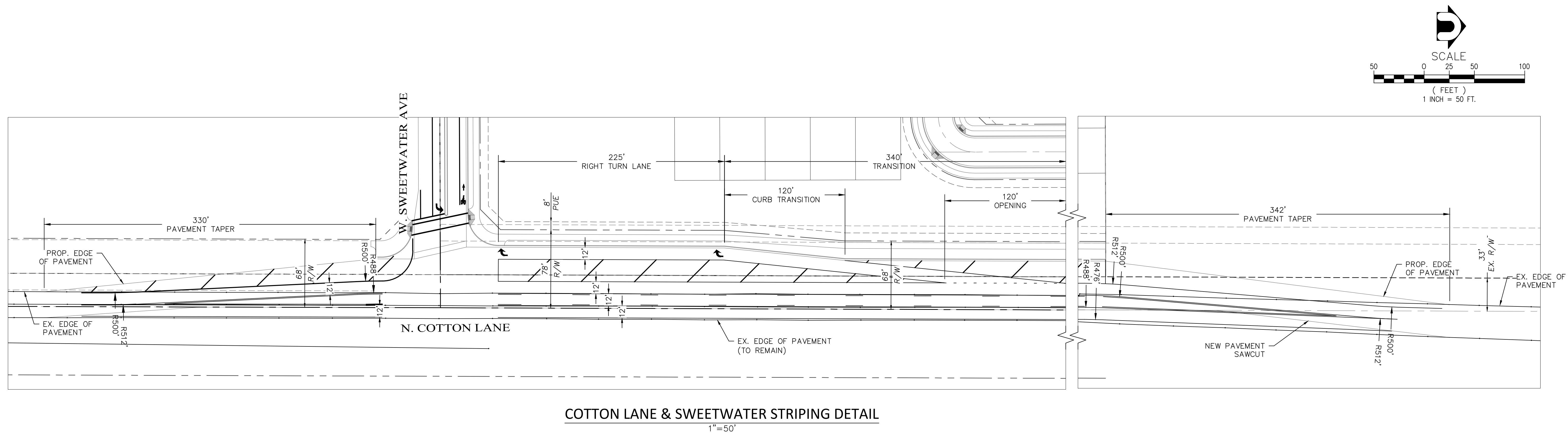
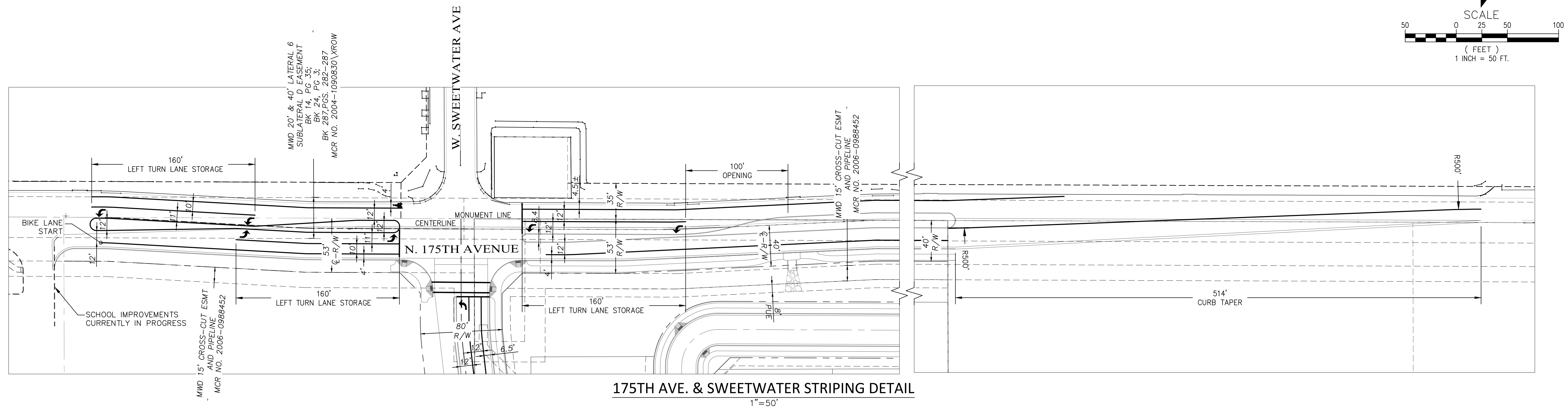


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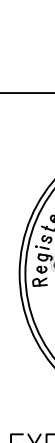
MWD 20' & 40' LATERAL 6
SUBLATERAL D EASEMENT
BK 14, PG 35;
BK 24, PG 3;
BK 287, PGS. 282-287
MCR NO. 2004-1090830\XROW

MWD 15" CROSS-CUT ESMT
AND PIPELINE

MWD 15' CROSS-CUT ESMT
AND PIPELINE
MCR NO. 2006-0988452

STRIPING DETAILS FOR RANCHO TRUGOLD CITY OF SURPRISE, ARIZONA	CASE #: FS17-583	
	SECTION: 14 TWSHP: 3N RANGE: 2W	
	JOB NO.: JCHG0001	
	SHEET	
	OF	
	7	

	DESIGNED BY: JCF
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	CHECKED BY: RYG
	DATE: 12 / 2017



EXPIRES: 3/31/2020

37287
RAMZI
GEORGES

RANCHO TRUGOLD

PRELIMINARY LANDSCAPE PLAN SURPRISE, ARIZONA

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.
- OAK AND ELM TREES INSTALLED WITHIN THE PUBLIC RIGHT-OF-WAY SHALL HAVE THEIR MAIN LEADER INTACT.
- TREES PLACED WITHIN THREE (3) FEET OF ANY SIDEWALK, CURB, PAVEMENT OR WALL WILL HAVE A ROOT BARRIER PER EDS 8-14.

CITY OF SURPRISE NOTES

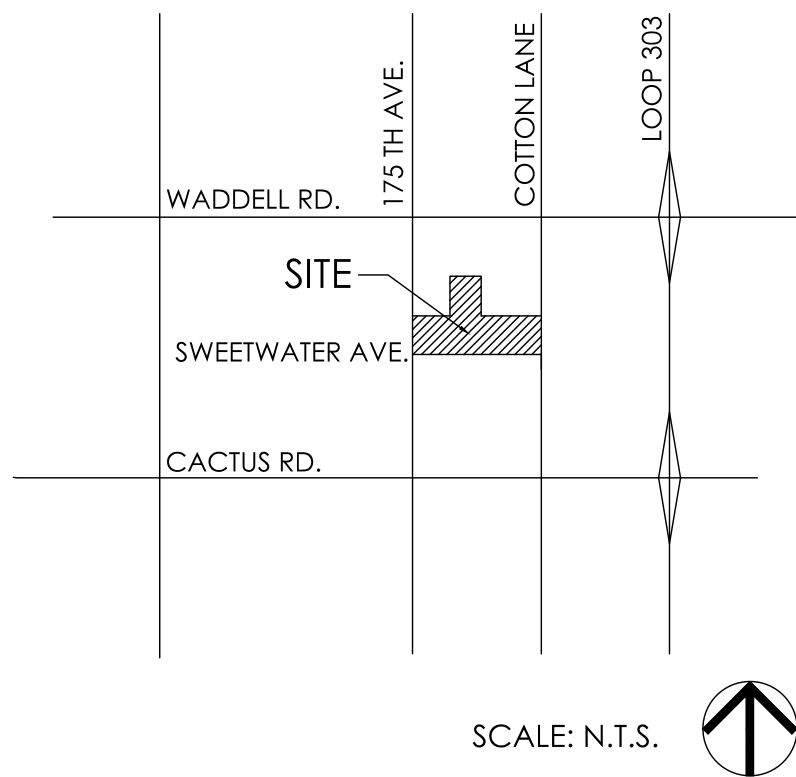
- ALL CHANGES TO BE APPROVED BY THE CITY OF SURPRISE PLANNING DEPARTMENT.
- SIGNS REQUIRE A SEPARATE PERMIT.
- ALL UTILITY BOXES AND STRUCTURES ARE TO BE SCREENED FROM VIEW.
- PLANT MATERIAL IS NOT TO BE LOCATED WITHIN 3 FEET OF ANY FIRE HYDRANT OR FIRE DEPARTMENT CONNECTION.
- ROOT BARRIER PER CITY 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

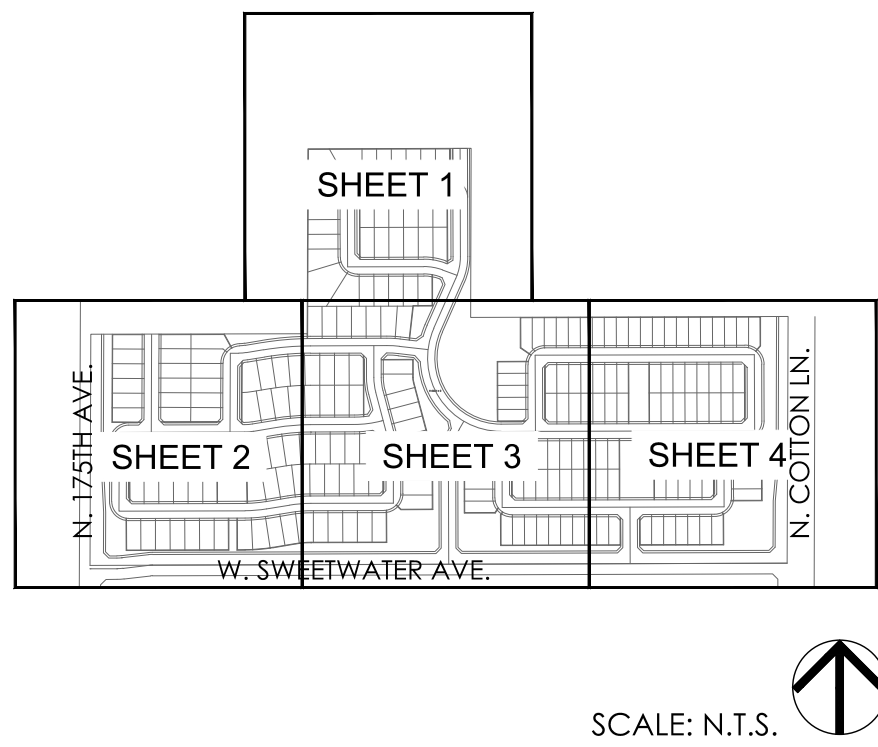
CURRENT ZONING:	RR
PROPOSED ZONING:	RM-6 PUD, RM-9 PUD
GROSS AREA:	63.18 AC.
NET DEVELOPABLE AREA:	45.62 AC.
OPEN SPACE REQUIRED:	24.0% (10.95 AC.)
OPEN SPACE PROVIDED:	25.8% (11.77 AC.)

FOR TRACT TABLE SEE PRELIMINARY PLAT, BY
DAVID EVANS AND ASSOCIATES.

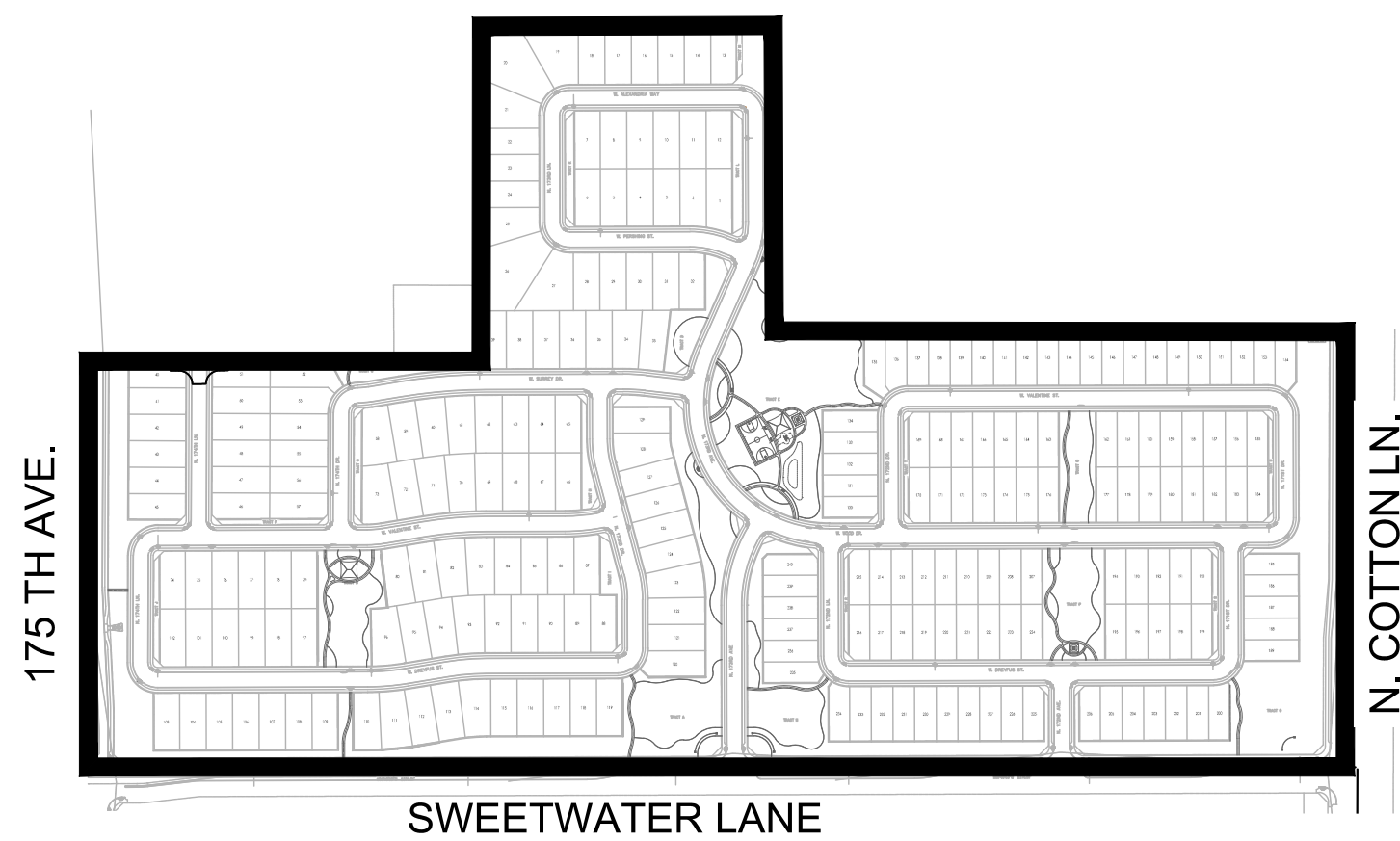
VICINITY MAP



KEYMAP



OVERALL PARCEL PLAN



PLANTING LEGEND

TREES

ACACIA ANEURA*	MULGA
BAUHINIA LUNARIOIDES*	ANACACHO ORCHID
CAESALPINIA CACALACO*	CASCALOTE 'SMOOTHIE'
OLEA EUROPAEA 'SWAN HILL'*	FRUITLESS OLIVE
PISTACIA CHINENSIS 'RED PUSH'**,**	RED PUSH PISTACHE
QUERCUS VIRGINIANA *	'CATHEDRAL' LIVE OAK
ULMUS PARVIFOLIA *	EVERGREEN ELM

OTHER TREES

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CHITALPA TASHKENTENSIS*	CHITALPA
DALBERGIA SISSOO*	INDIAN ROSEWOOD
EUCALYPTUS MICROTHECA*	COOLIBAH TREE
FICUS MICROCARPA	INDIAN LAUREL FIG
JACARANDA MIMOSIFOLIA	JACARANDA
SOPHORA SECUNDIFLORA**	TEXAS MOUNTAIN LAUREL
THEVETIA PERUVIANA*	YELLOW OLEANDER
VITEX AGNUS-CASTUS	CHASTE TREE

SHRUBS

BUXUS MICROPHYLLA JAPONICA	JAPANESE BOXWOOD
CALLISTEMON VIMINALIS*	'LITTLE JOHN' BOTTLEBRUSH
CARISSA MICROCARPA	BOXWOOD BEAUTY NATAL PLUM
CHRYSACTINIA MEXICANA*	DAMIANITA
DIETES BICOLOR	FORTNIGHT LILY
EREMOPHILA MACULATA*	VALENTINE BUSH
GARDENIA JASMINOIDES	GARDENIA
HIBISCUS ROSA-SINENSIS	CHINESE HIBISCUS
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MUHLENBERGIA RIGENS*	DEER GRASS
MYRTUS COMMUNIS 'COMPACTA'*	DWARF MYRTLE
NANDINA DOMESTICA*	HEAVENLY BAMBOO
PLUMBAGO AURICULATA*	CAPE PLUMBAGO
RAPHIOLEPIS INDICA 'BALLERINA'	BALLERINA INDIAN HAWTHORN
SIMMONDSIA CHINENSIS	JOJOBA
TECOMA STANS 'ORANGE JUBILEE'	ARIZONA YELLOW BELLS
VAUQUELINIA CALIFORNICA*	ARIZONA ROSEWOOD

ACCENTS

CYCAS REVOLUTA*	SAGO PALM
GUARA LINDHEIMERI	LINDHEIMER'S BEEBLOSSOM
HESPERALOE PARVIFLORA*	RED YUCCA
YUCCA BACATA*	BANANA YUCCA
YUCCA GLORIOSA*	SPANISH DAGGER
YUCCA RECURVIFOLIA*	PENDULOUS YUCCA

GROUND COVERS

CARISSA GRANDIFLORA	GREEN CARPET NATAL PLUM
CONVOLVULUS TRICOLOR	DWARF MORNING GLORY
GAZANIA RIGENS 'SUN GOLD'*	'SUN GOLD' GAZANIA
LANTANA CAMARA 'NEW GOLD'*	NEW GOLD LANTANA
LANTANA MONTEVIDENSIS*	PURPLE TRAILING LANTANA
LANTANA MONTEVIDENSIS 'WHITE'*	TRAILING WHITE LANTANA
ROSMARINUS OFFICINALIS*	PROSTRATE ROSEMARY
TRACHELOSPERMUM ASIATICUM	DWARF STAR JASMINE
VERBENA SP.	VERBENA
VINCA MAJOR	VINCA MAJOR
ZEPHYRANTHES SP.	RAIN LILY

VINES

BOUGAINVILLEA BRASILIENSIS*	LA JOLLA BOUGAINVILLEA
GELSEMIUM SEMPERVIRENS	CAROLINA JASMINE
LONICERA JAPONICA 'HALLIANA'	HALL'S HONEYSUCKLE
ROSA BANKSIAE*	LADY BANK'S ROSE

INERT

TURF	SOD - HYBRID BERMUDA
------	----------------------

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.
- 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 to L-4	2 - 5	LANDSCAPE PLAN
W-1	6	WALL & MAILBOX PLAN
WD-1	7	WALL DETAILS

PROJECT TEAM

Discipline	Company Contact Info.
Client	John C. and Helen G. Truman Trust James S. Truman P.O. Box 145 Waddell, AZ 85355 (602)-320-3355 jstruman@msn.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

Tract A: Turf retention basin / Pedestrian walkway

Tract B: Picnic Ramada / Turf

Tract C: Pedestrian Walkway / Open space

Tract D: Open space / Turf

Tract E: Turf retention basin / Picnic Ramada / Tot Lot / Sports court

Tract N: Turf retention basin / Pedestrian Walkway

Tract O: Open Space Retention / Pedestrian Walkway

Tract P: Turf Retention Basin / Picnic Ramada

Tract Q: Turf / Pedestrian Walkway

LVA urban design studio
land planning • development entitlements • landscape architecture
120 south ash avenue • tempe, arizona 85281 • 480-994-0994
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RANCHO TRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA

John C. & Helen G. Truman Trust

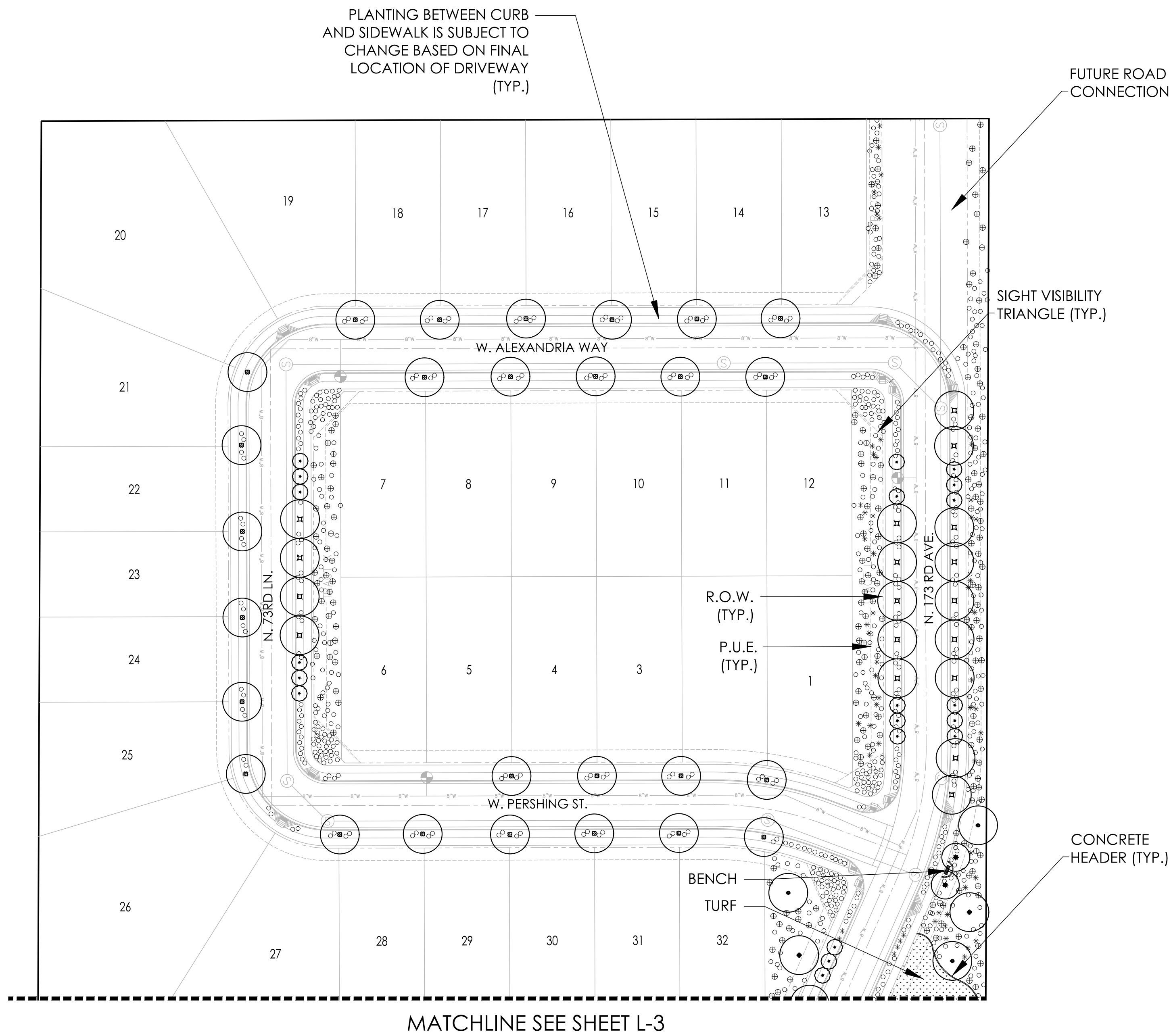
COVER
SHEET

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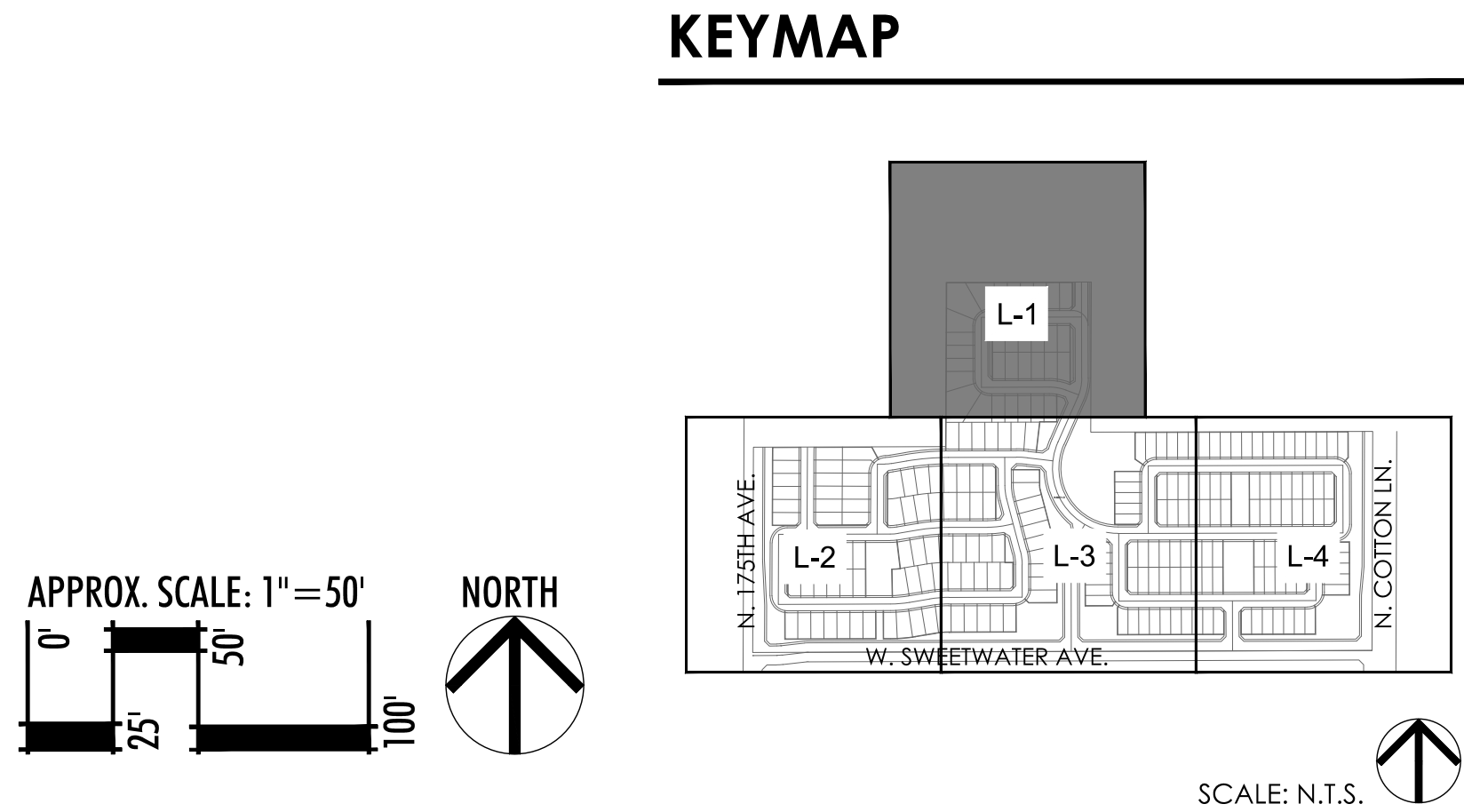
Call Your Working Days
Before You Dig
602-263-1100
1-800-STAKE-IT
(Outside Maricopa County)

date: 09/19/17
job no.: 1735
drawn: LVA
sheet #

C-1
1 of 7



PLANTING LEGEND		
TREES		
ACACIA ANEURA*	MULGA	
BAUHINIA LUNARIOIDES*	ANACACHO ORCHID	
CAESALPINIA CACALACO*	CASCALOTE 'SMOOTHIE'	
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TURF	SOD - HYBRID BERMUDA	
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1. * Plants on the ADWR Low Water Use Drought Tolerant plant list.		
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PLANTING BETWEEN CURB
AND SIDEWALK IS SUBJECT TO
CHANGE BASED ON FINAL
LOCATION OF DRIVEWAY
(TYP.)

TREES HAVE BEEN
LEFT OUT OF MWD
EASEMENT

5' CONCRETE
SIDEWALK

LANDSCAPING IN
MEDIAN TO BE
DETERMINED AT A
LATER DATE

SIGHT DISTANCE
LINE (TYP.)

LANDSCAPE IN
MEDIAN BY OTHERS

5' CONCRETE
SIDEWALK

R.O.W.
(TYP.)

P.U.E.
(TYP.)

TOT LOT
WITH SHADE
STRUCTURE

OPEN TURF
PLAY
AREA/RETENTION

5' CONCRETE
SIDEWALK

CONCRETE
HEADER (TYP.)

5' CONCRETE
SIDEWALK

MATCHLINE SEE SHEET L-3

PLANTING LEGEND

TREES

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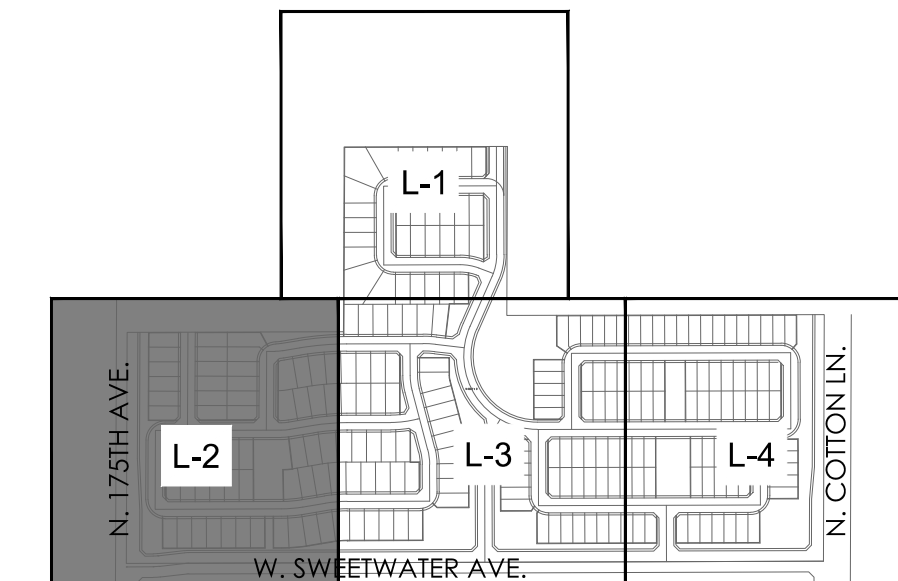
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- Trees with erect growth habit within the right-of-way or adjacent to any sidewalk shall have their main vertical leader intact and shall remained unclipped.

KEYMAP

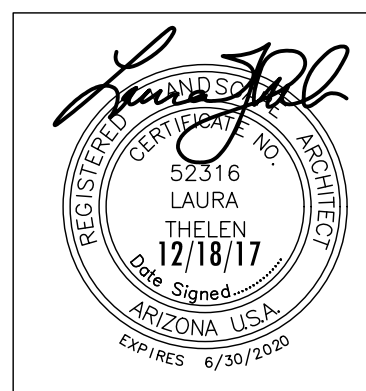


APPROX. SCALE: 1"=50'



SCALE: N.T.S.

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RANCHO TRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA

John C. & Helen G. Truman Trust

**LANDSCAPE
PLAN**

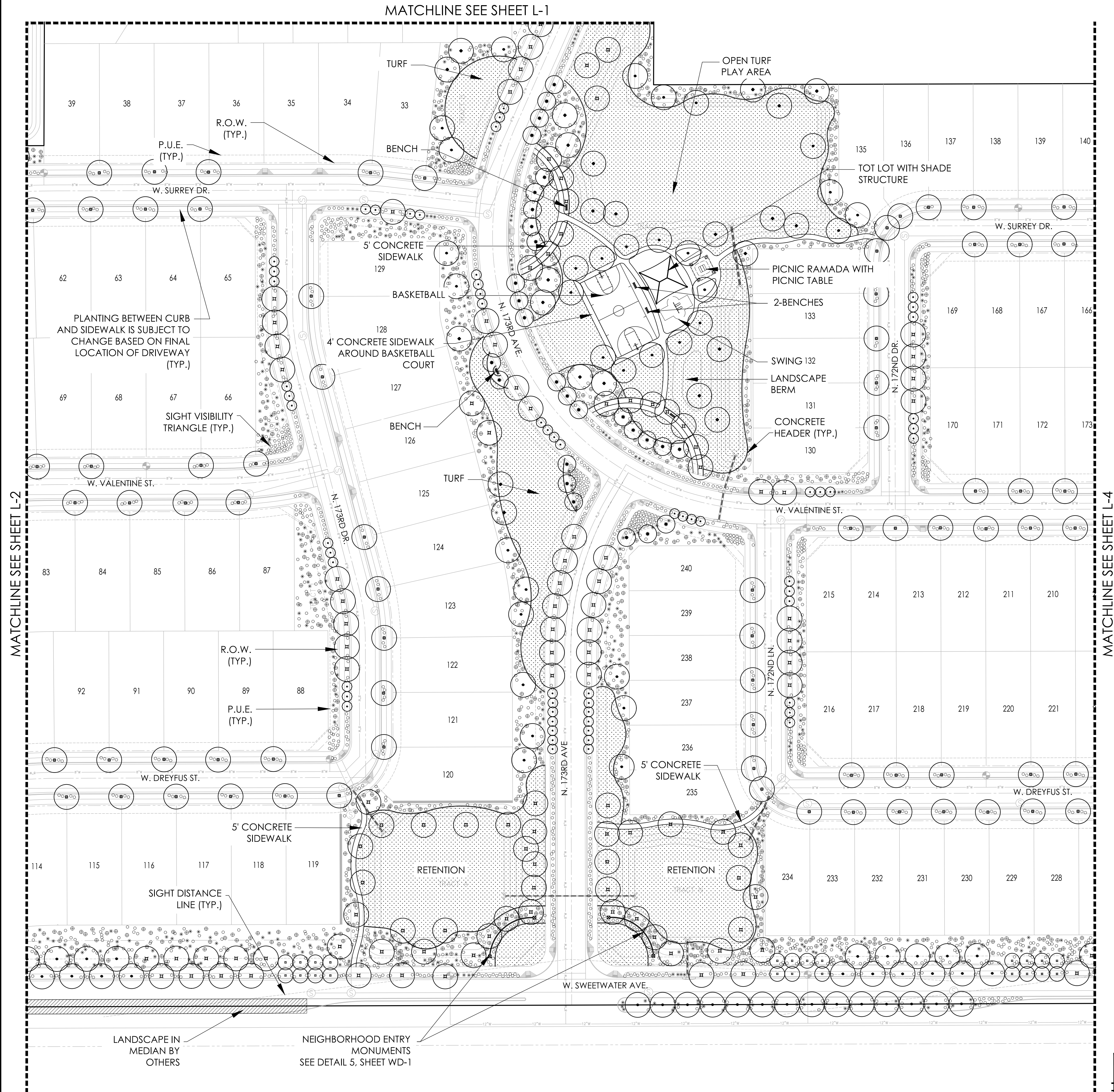
revision	date



date: 09/19/17
job no.: 1735
drawn: LVA
sheet #

L-2
3 of 7

CITY OF SURPRISE CASE #FS17-583



PLANTING LEGEND

TREES

ACACIA ANEURA*	MULGA
BAUHINIA LUNARIOIDES*	ANACACHO ORCHID
CAESALPINIA CACALACO*	CASCALOTE 'SMOOTHIE'
OLEA EUROPAEA 'SWAN HILL'	FRUITLESS OLIVE
PISTACIA CHINENSIS 'RED PUSH'**,**	RED PUSH PISTACHE
QUERCUS VIRGINIANA *	'CATHEDRAL' LIVE OAK
ULMUS PARVIFOLIA *	EVERGREEN ELM

OTHER TREES

ACACIA ANEURA	MULGA
CHITALPA TASHKENTENSIS*	CHITALPA
DALBERGIA SISSOO*	INDIAN ROSEWOOD
EUCALYPTUS MICROTHECA*	COOLBAH TREE
FICUS MICROCARPA	INDIAN LAUREL FIG
JACARANDA MIMOSIFOLIA	JACARANDA
SOPHORA SECUNDIFLORA**	TEXAS MOUNTAIN LAUREL
THEVETIA PERUVIANA*	YELLOW OLEANDER
VITEX AGNUS-CASTUS	CHASTE TREE

SHRUBS

BUXUS MICROPHYLLA JAPONICA	JAPANESE BOXWOOD
CALLISTEMON VIMINALIS*	'LITTLE JOHN' BOTTLEBRUSH
CARISSA MICROCARPA	BOXWOOD BEAUTY NATAL PLUM
CHRYSACTINIA MEXICANA*	DAMIANITA
DIETES BICOLOR	FORTNIGHT LILY
EREMOPHILA MACULATA*	VALENTINE BUSH
GARDENIA JASMINOIDES	GARDENIA
HIBISCUS ROSA-SINENSIS	CHINESE HIBISCUS
ILEX VOMITORIA 'STOKES'	DWARF YAUPON
MUHLBERGIA RIGENS*	DEER GRASS
MYRTUS COMMUNIS 'COMPACTA'*	DWARF MYRTLE
NANDINA DOMESTICA*	HEAVENLY BAMBOO
PLUMBAGO AURICULATA*	CAPE PLUMBAGO
RAPHIOLEPIS INDICA 'BALLERINA'	BALLERINA INDIAN HAWTHORN
SIMMONDSIA CHINENSIS	JOJOBA
TECOMA STANS 'ORANGE JUBILEE'	ARIZONA YELLOW BELLS
VAUQUELINIA CALIFORNICA*	ARIZONA ROSEWOOD
ACCENTS	

CYCAS REVOLUTA*	SAGO PALM
GUARA LINDHEIMERI	LINDHEIMER'S BEEBLOSSOM
HESPERALOE PARVIFLORA*	RED YUCCA
YUCCA BACATA*	BANANA YUCCA
YUCCA GLORIOSA*	SPANISH DAGGER
YUCCA RECURVIFOLIA*	PENDULOUS YUCCA

GROUND COVERS

CARISSA GRANDIFLORA	GREEN CARPET NATAL PLUM
CONVOLVULUS TRICOLOR	DWARF MORNING GLORY
GAZANIA RIGENS 'SUN GOLD'*	'SUN GOLD' GAZANIA
LANTANA CAMARA 'NEW GOLD'*	NEW GOLD LANTANA
LANTANA MONTEVIDENSIS*	PURPLE TRAILING LANTANA
LANTANA MONTEVIDENSIS 'WHITE'	TRAILING WHITE LANTANA
ROSMARINUS OFFICINALIS*	PROSTRATE ROSEMARY
TRACHELOSPERMUM ASIATICUM	DWARF STAR JASMINE
VERBENA SP.	VERBENA
VINCA MAJOR	VINCA MAJOR
ZEPHYRANTHES SP.	RAIN LILY

VINES

BOUGAINVILLEA BRASILIENSIS*	LA JOLLA BOUGAINVILLEA
GELSEMIUM SEMPERVIRENS	CAROLINA JASMINE
LONICERA JAPONICA 'HALLIANA'	HALL'S HONEYSUCKLE
ROSA BANKSIAE*	LADY BANK'S ROSE

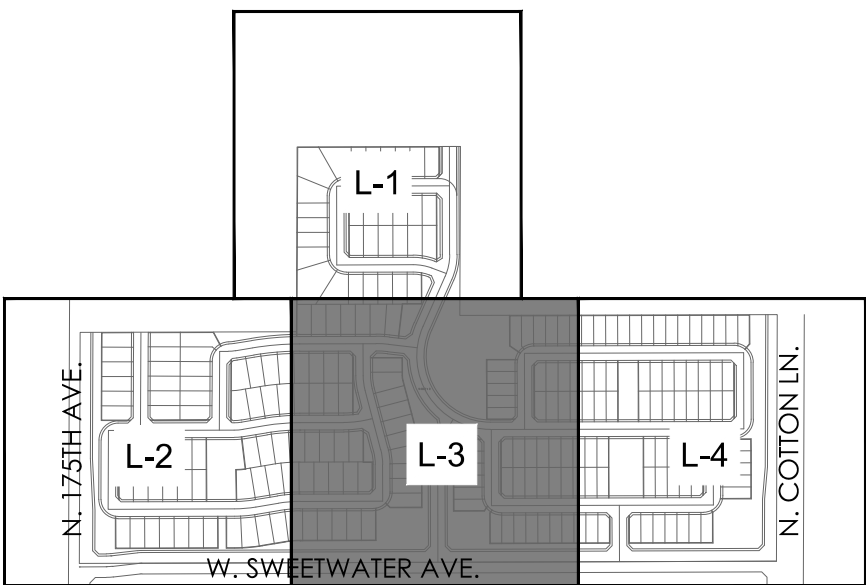
INERT

TURF	SOD - HYBRID BERMUDA
------	----------------------

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.
- 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.

KEYMAP



APPROX. SCALE: 1"=50'

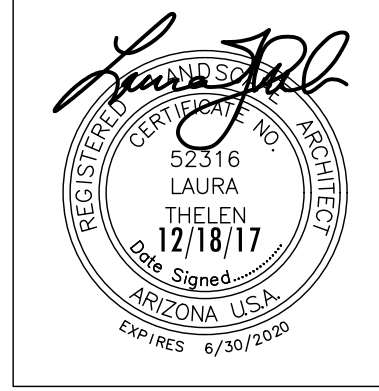


NORTH



SCALE: N.T.S.

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RANCHO TRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
John C. & Helen G. Truman Trust

LANDSCAPE PLAN

revision	date

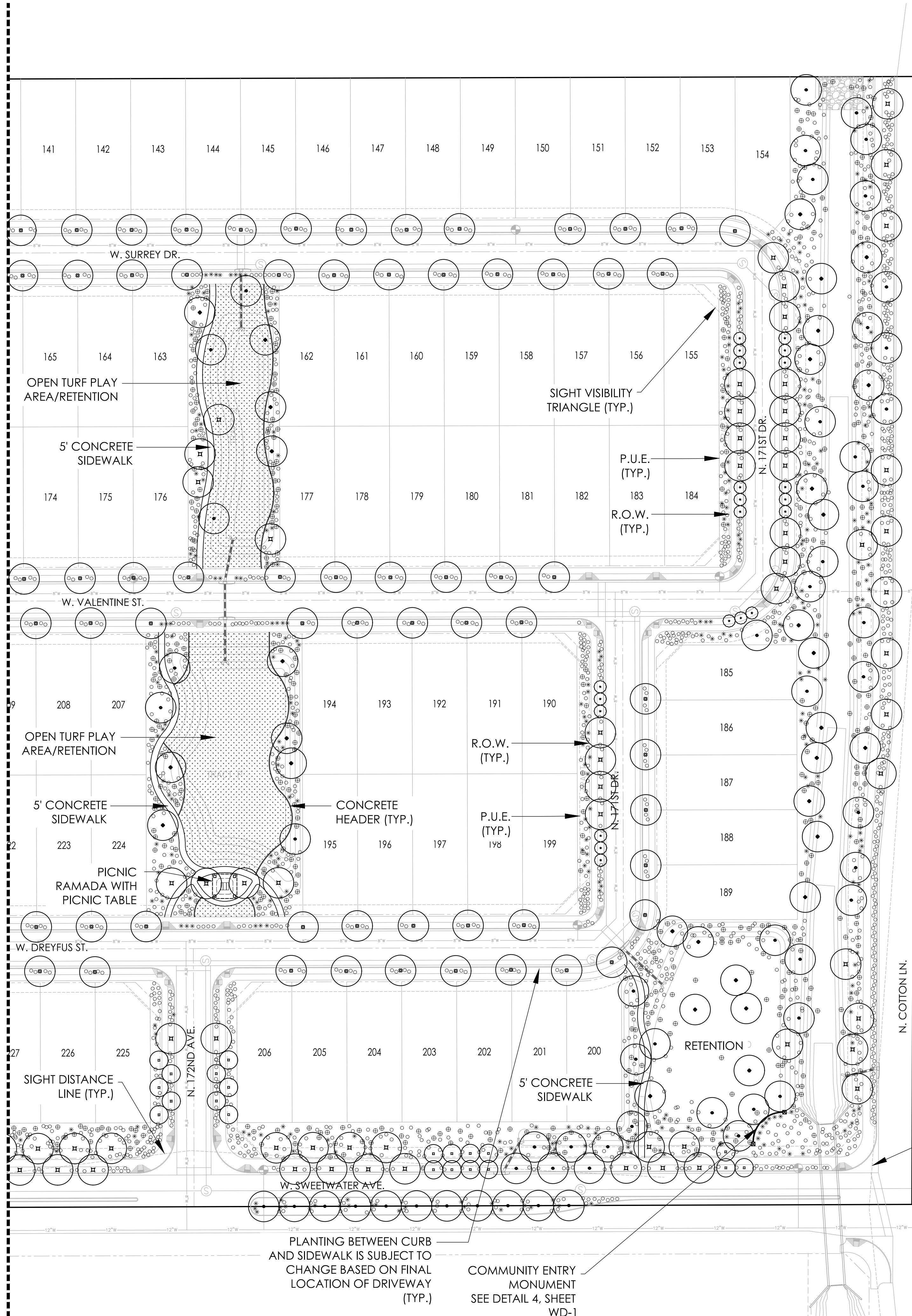
Call Your Working Days Before You Dig
602-263-1100
1-800-STAKE-IT
(Outside Maricopa County)

date: 09/19/17
job no.: 1735
drawn: LVA
sheet #

L-3
4 of 7

CITY OF SURPRISE CASE #FS17-583

MATCHLINE SEE SHEET L-3



PLANTING BETWEEN CURB AND SIDEWALK IS SUBJECT TO CHANGE BASED ON FINAL LOCATION OF DRIVEWAY (TYP.)

COMMUNITY ENTRY MONUMENT SEE DETAIL 4, SHEET WD-1

PLANTING LEGEND

TREES

ACACIA ANEURA*	MULGA
BAUHINIA LUNARIOIDES*	ANACACHO ORCHID
CAESALPINIA CACALACO*	CASCALOTE 'SMOOTHIE'
OLEA EUROPAEA 'SWAN HILL'	FRUITLESS OLIVE
PISTACIA CHINENSIS 'RED PUSH'**,**	RED PUSH PISTACHE
QUERCUS VIRGINIANA *	'CATHEDRAL' LIVE OAK
ULMUS PARVIFOLIA *	EVERGREEN ELM

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FICUS MICROCARPA	INDIAN LAUREL FIG
JACARANDA MIMOSIFOLIA	JACARANDA
SOPHORA SECUNDIFLORA**	TEXAS MOUNTAIN LAUREL
THEVETIA PERUVIANA*	YELLOW OLEANDER
VITEX AGNUS-CASTUS	CHASTE TREE

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BUXUS MICROPHYLLA JAPONICA	JAPANESE BOXWOOD
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RAPHIOLEPIS INDICA 'BALLERINA'	BALLERINA INDIAN HAWTHORN
SIMMONDSIA CHINENSIS	JOJOBA
TECOMA STANS 'ORANGE JUBILEE'	ARIZONA YELLOW BELLS
VAUQUELINIA CALIFORNICA*	ARIZONA ROSEWOOD
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CYCAS REVOLUTA*	SAGO PALM
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VINES

BOUGAINVILLEA BRASILIENSIS*	LA JOLLA BOUGAINVILLEA
GELSEMIUM SEMPERVIRENS	CAROLINA JASMINE
LONICERA JAPONICA 'HALLIANA'	HALL'S HONEYSUCKLE
ROSA BANKSIAE*	LADY BANK'S ROSE

INERT

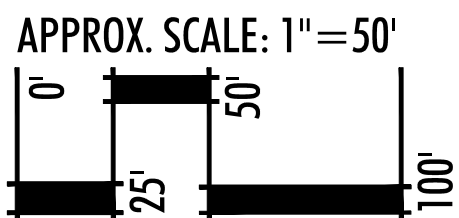
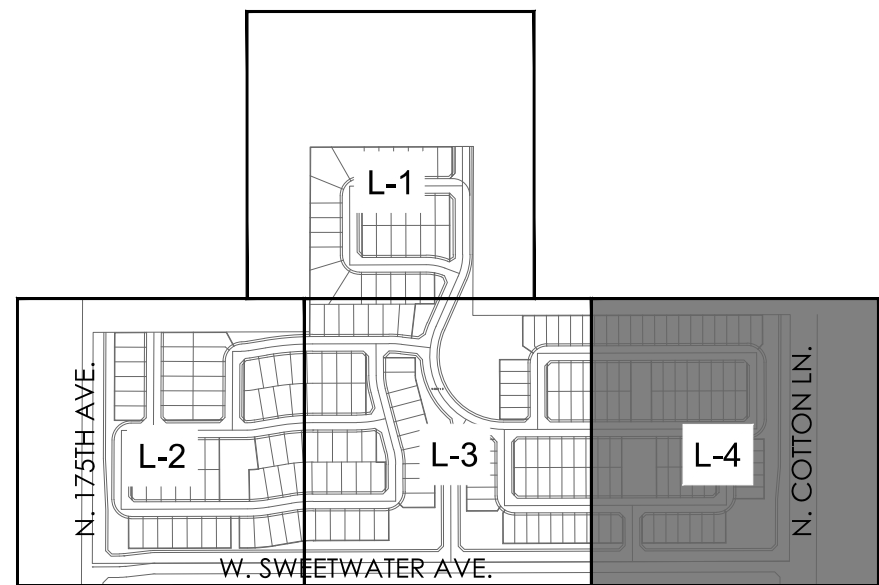
TURF

SOD - HYBRID BERMUDA

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.
- 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.

KEYMAP



SCALE: N.T.S.

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RANCHO TRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA

John C. & Helen G. Truman Trust

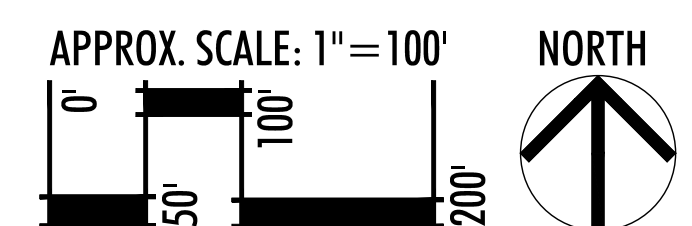
LANDSCAPE PLAN

revision	date



date: 09/19/17
job no.: 1735
drawn: LVA
sheet #

L-4
5 of 7

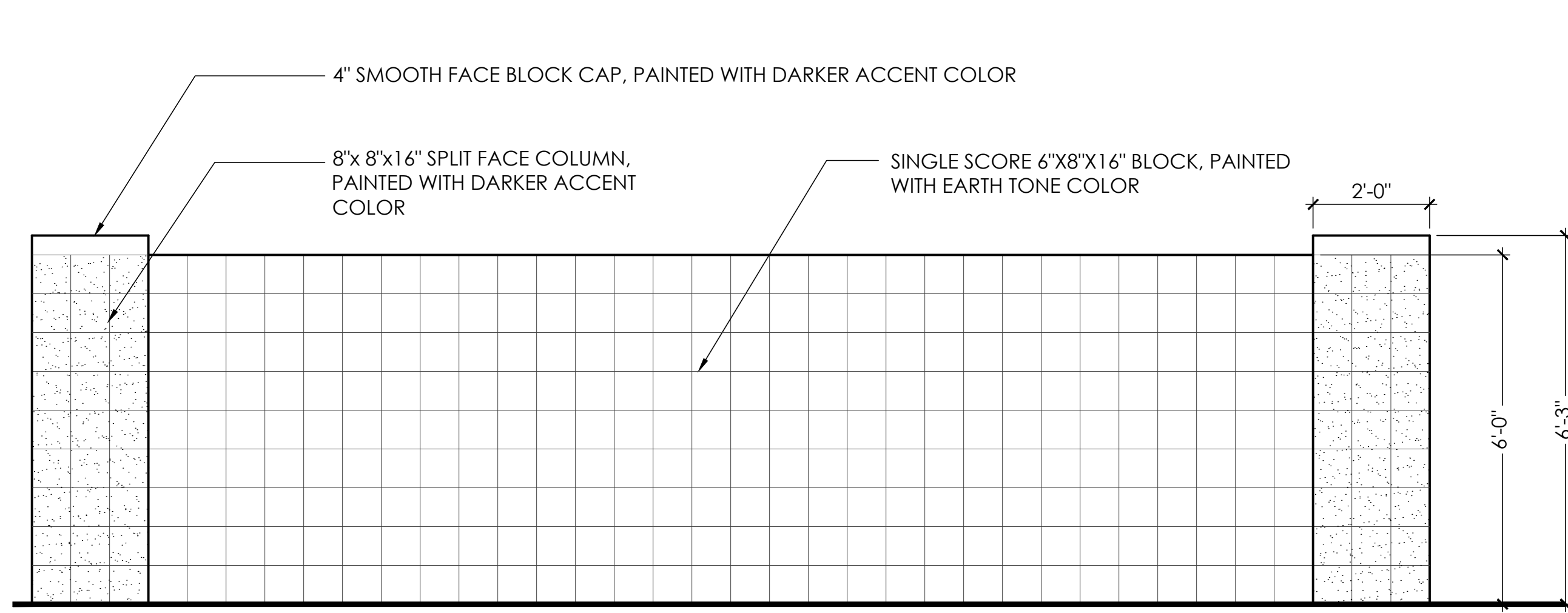


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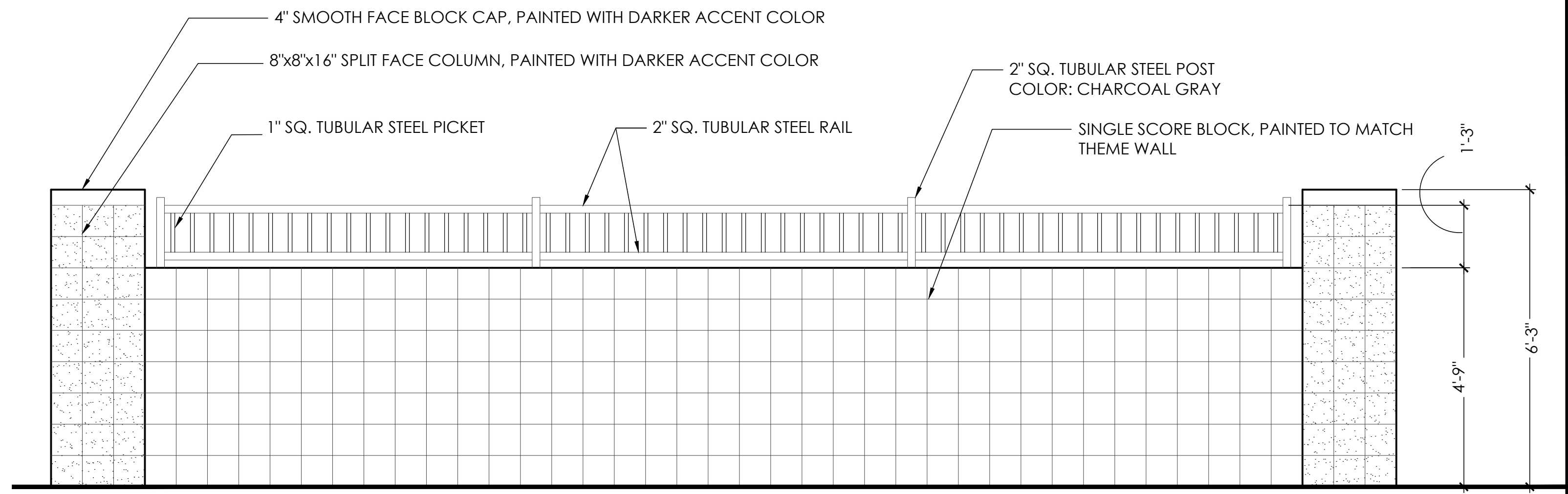
1. ALL MAILBOX LOCATIONS AND SIZES ARE PRELIMINARY AND ARE SUBJECT TO FINAL APPROVAL BY THE U.S.P.S.
2. ADEQUATE LIGHTING FIXTURES WILL BE PROVIDED IN MAILBOX LOCATIONS. DETAILS TO BE PROVIDED WITH FINAL PLANS.

WALL
PLAN

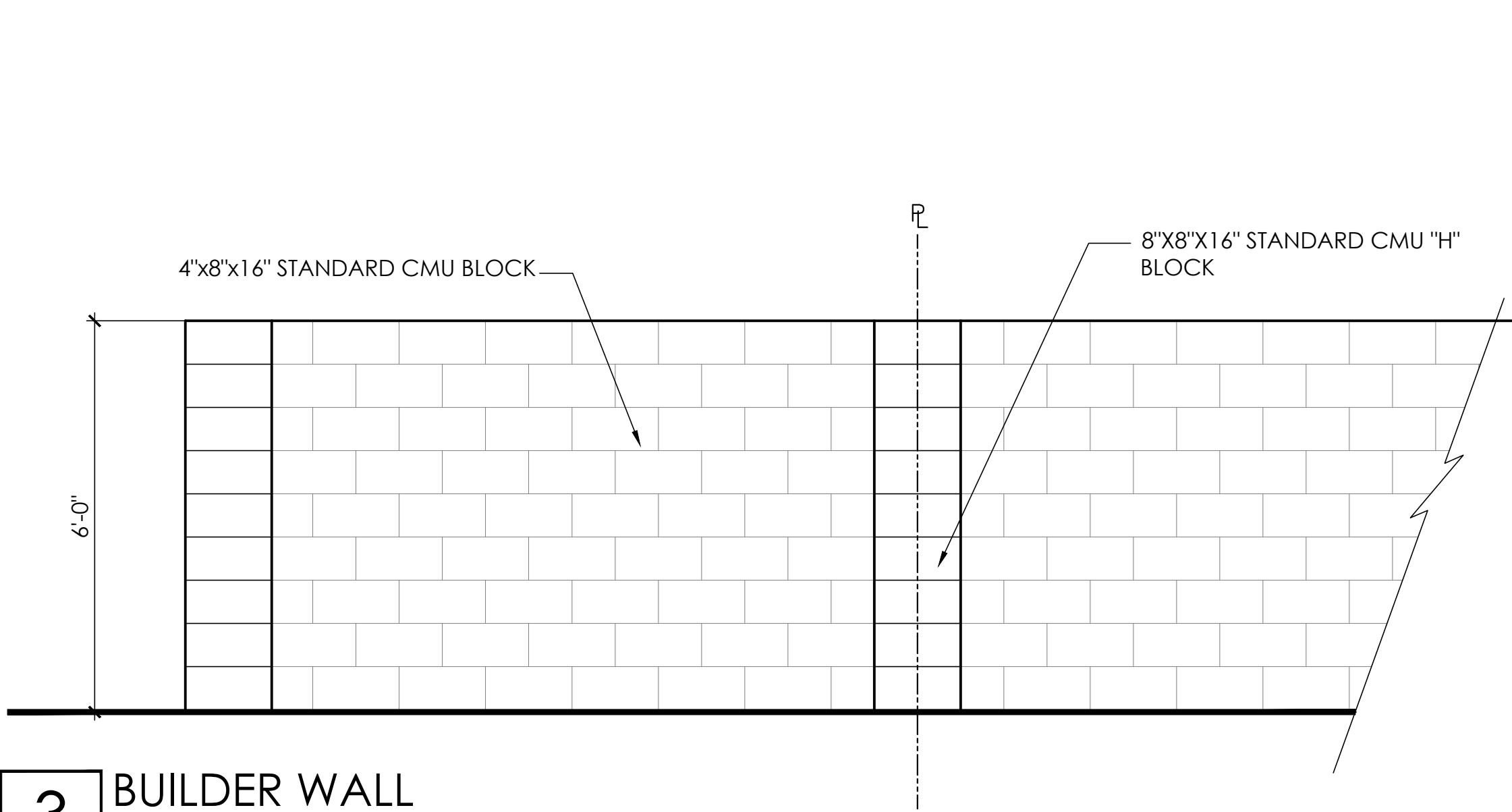
W-1
6 of 7



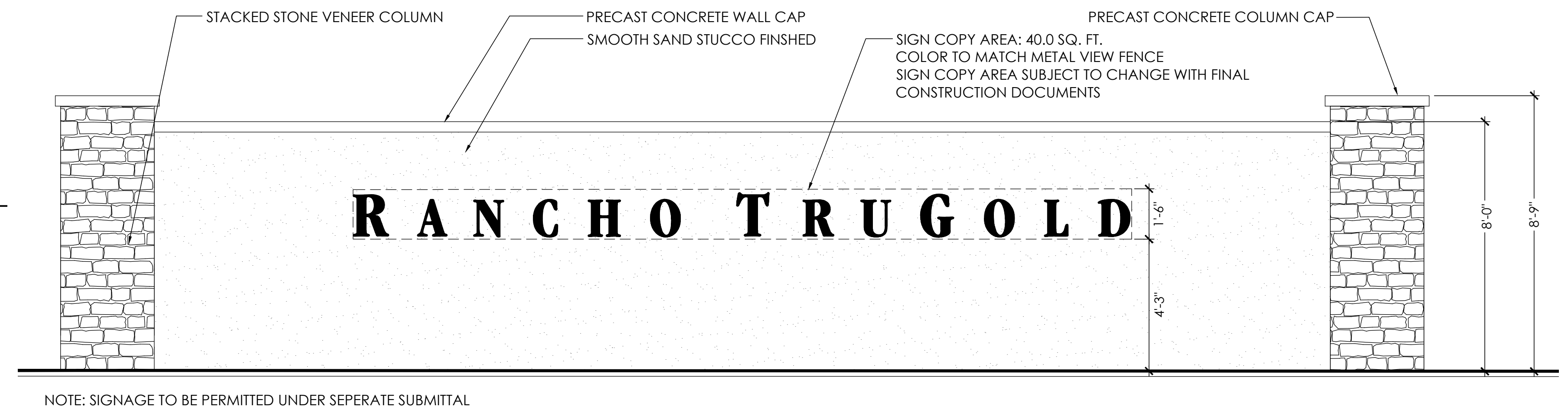
1 THEME WALL/COLUMN
SCALE: 1/2" = 1'-0"



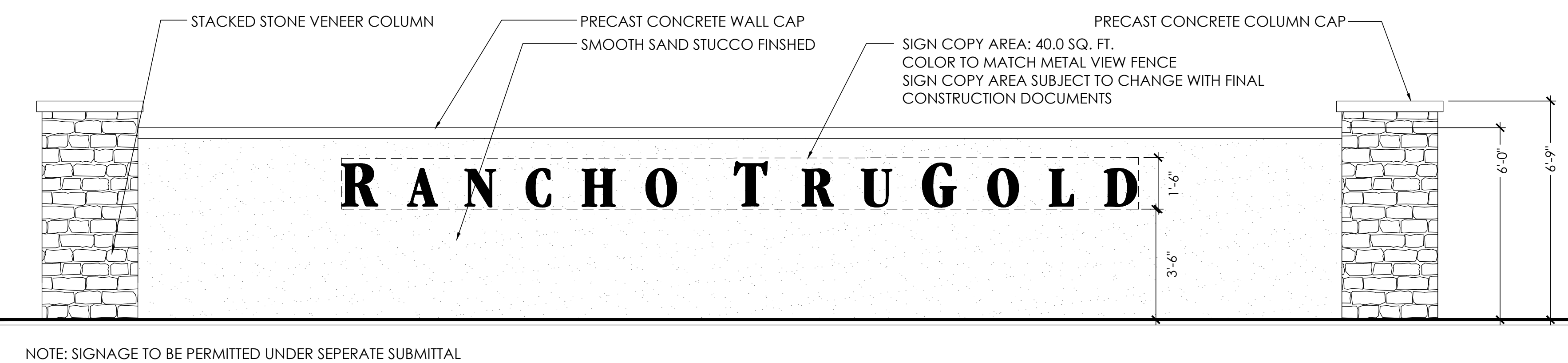
2 PARTIAL VIEW FENCE
SCALE: 1/2" = 1'-0"



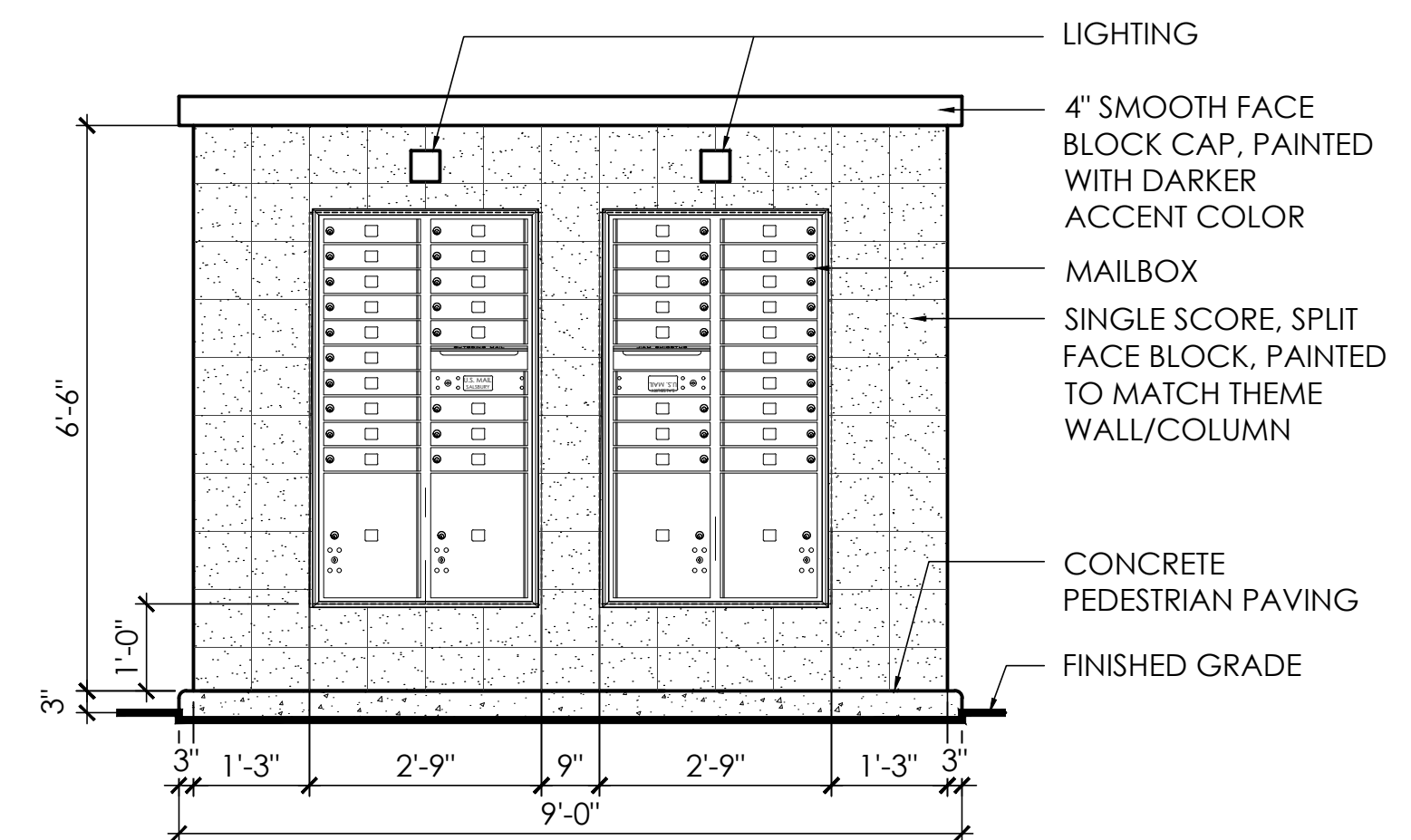
3 BUILDER WALL
SCALE: 1/2" = 1'-0"



4 COMMUNITY ENTRY MONUMENT
SCALE: 3/8" = 1'-0"



5 NEIGHBORHOOD ENTRY MONUMENT
SCALE: 3/8" = 1'-0"



6 MAILBOX
SCALE: 1/2" = 1'-0"

Robert Kuhfuss

From: Debbie Trasancos <DebbieT@mwdaz.com>
Sent: Wednesday, October 04, 2017 10:48 AM
To: Jamie Sullivan
Cc: Chris Cain; Leslie Jarrell
Subject: MWD - FS17-583 NWC Cotton Lane and Sweetwater Electronic Submittal
Attachments: MWD Fees & Payment Schedule 2017.pdf; MWD Drawing Requirements.pdf

Thank you for providing the electronic submittal for Cotton Lane and Sweetwater Ave (CR17-312).

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

From: Jamie Sullivan [<mailto:Jamie.Sullivan@surpriseaz.gov>]
Sent: Wednesday, October 04, 2017 10:04 AM
To: Barbara Plante - Luke <barbara.plante@us.af.mil>; Brad Finke - EPCOR <bfinke@epcor.com>; Chris Cain <ChrisC@mwdaz.com>; Christina Betz <Christina.Betz@surpriseaz.gov>; Debbie Trasancos <DebbieT@mwdaz.com>; Denise Lacey <deniselacey@mail.maricopa.gov>; Donna Miller <Donna.Miller@surpriseaz.gov>; Jack Eaton <jack.eaton@dysart.org>; Kevin Shipman <kevin.shipman@dysart.org>; Leslie Jarrell <LeslieJ@mwdaz.com>; Mark Frago <fragom@mail.maricopa.gov>; Paul Jackson <paul.j.jackson@usps.gov>; Project Coordinator <redletter@azdot.gov>; Richard Hammitt <Richard.Hammitt@aps.com>; Sandy Simmons <Sandy.Simmons@surpriseaz.gov>; Theresa Tysiak - USPS <theresa.a.tysiak@usps.gov>; Timothy Klarkowski <Timothy.Klarkowski@surpriseaz.gov>; Vern Wolfley - MAG <vwolfley@azmag.gov>; Victor.Schaum <Victor.Schaum@cox.com>; Yvonne Aguirre <yvonne.aguirre@swgas.com>
Subject: RE: FS17-583 NWC Cotton Lane and Sweetwater Electronic Submittal

See password below.

A8PTXKB

From: Jamie Sullivan
Sent: Wednesday, October 04, 2017 10:01 AM
To: 'Barbara Plante - Luke'; 'Brad Finke - EPCOR'; 'Chris Cain - MWD'; Christina Betz; 'Debbie Trasancos - MWD'; 'Denise

Lacey'; 'Donna Miller'; 'Jack Eaton'; 'Kevin Shipman'; 'Leslie - MWD'; 'Mark Frago'; 'Paul Jackson'; 'Project Coordinator'; 'Richard Hammitt'; Sandy Simmons; 'Theresa Tysiak - USPS'; Timothy Klarkowski; 'Vern Wolfley - MAG'; 'Victor.Schaum'; 'Yvonne Aguirre'

Subject: FS17-583 NWC Cotton Lane and Sweetwater Electronic Submittal

Please click the following link to download your files:

https://FTP.SURPRISEAZ.GOV:443/AHT/AHT_UI/public/index.html#/password?package=jAbHexlW%2fwnfpAZc1vSnWKucaTMWiRKVBPOco9iVvK03E%2fbPVfOZtHoSDKkUpmgDHvVgt8rzpkliPC11KdzfgJQ%2bFlyK9QVOE%2fcnrFi4Z3Jc%3d

Attached you will find the submittal documents for the above referenced project.

Due to the file size, I will be sending this through the FTP site. I will provide you a password shortly.

If you have any questions or need clarification, please feel free to contact me.

Thank you and I hope you have a great day!

Jamie Sullivan
Planning Project Coordinator
16000 N Civic Center Plaza
Surprise, AZ 85374
623.222.3099
[*jamie.sullivan@surpriseaz.gov*](mailto:jamie.sullivan@surpriseaz.gov)

City Hall offices open at 8 a.m. and close at 5 p.m. Monday through Friday. More info at www.surpriseaz.gov.

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04 Oct 2017 17:03:53 -0000



S U R P R I S E

A R I Z O N A

Planning & Zoning Commission

March 6, 2018

Rancho TruGold

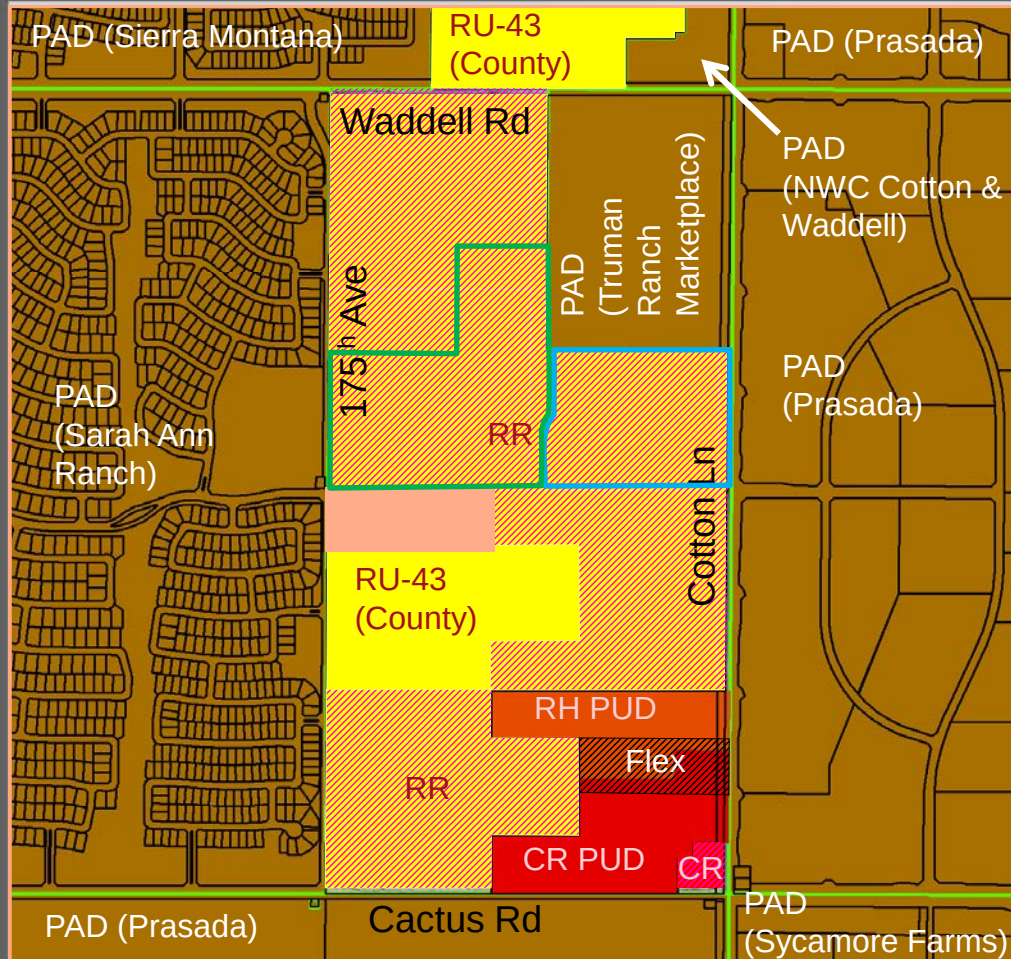
Zone Change and Preliminary Plat

FS17-583



Previously associated with the Magnolia Project



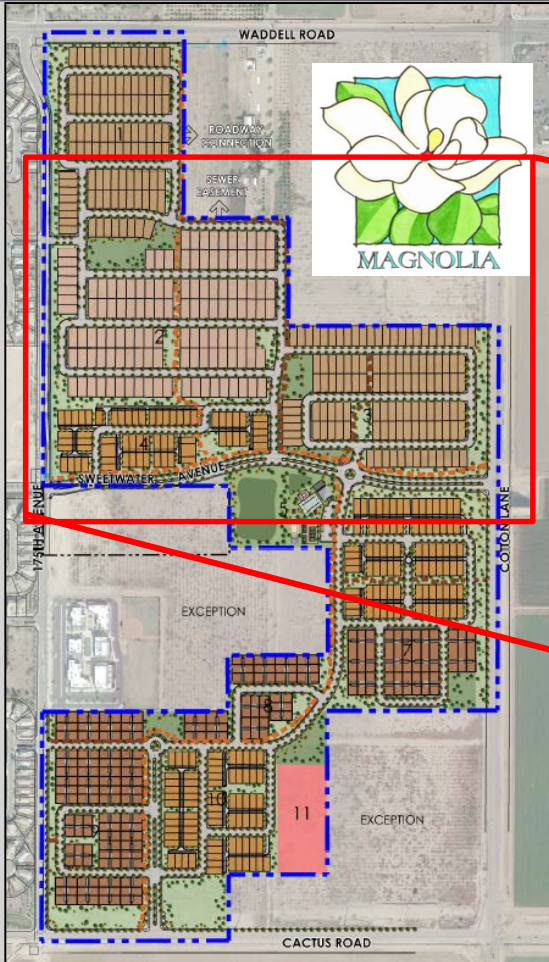


Zone Change

- Existing County RU-43 Zoning
- Existing Surprise RR Zoning*
- Existing Surprise RM-9 PUD Zoning
- Existing Surprise RH PUD Zoning
- Existing Surprise CR PUD Zoning
- Existing Surprise PAD Zoning
- Existing Surprise CR PUD / RH PUD Flex Zoning
- Existing Surprise CR Zoning*
- Subject Property – Zone Change from RR to RM-9 PUD**
- Subject Property – Zone Change from RR to RM-6 PUD**

*Post-Annexation zoning approved as part of Annexation request under FS16-427

Original Configuration and Relationship



Zone Change

PUD OVERLAY

Zone Change

➤ Removes Community Pool requirement

“Medium density residential projects containing 60 residential units or greater shall be provided a swimming pool amenity, unless there is a community pool included as part of the overall development.” SUDC 122-137(r)

Rationale – With 20’ rear setbacks, individual yards will be large enough to accommodate private swimming pools if desired

PUD OVERLAY

➤ Adjusts Roadway Landscape Buffers

SUDC 122-137(e)(1)a requires an open space tract of not less than 60' in width adjacent to arterials and parkways. The PUD Overlay makes this 60' average width.

Rationale: The applicant proposes an average width of 60.

SUDC 122-137(e)(1)a.1 requires single-loaded streets with that houses face the 60' open space.

Rationale – There are no proposed single-loaded streets as they are not typical for the area.

Zone Change

PUD OVERLAY



Zone Change

PUD OVERLAY

Zone Change

- **Adjusts size of turf area associated with recreation field**

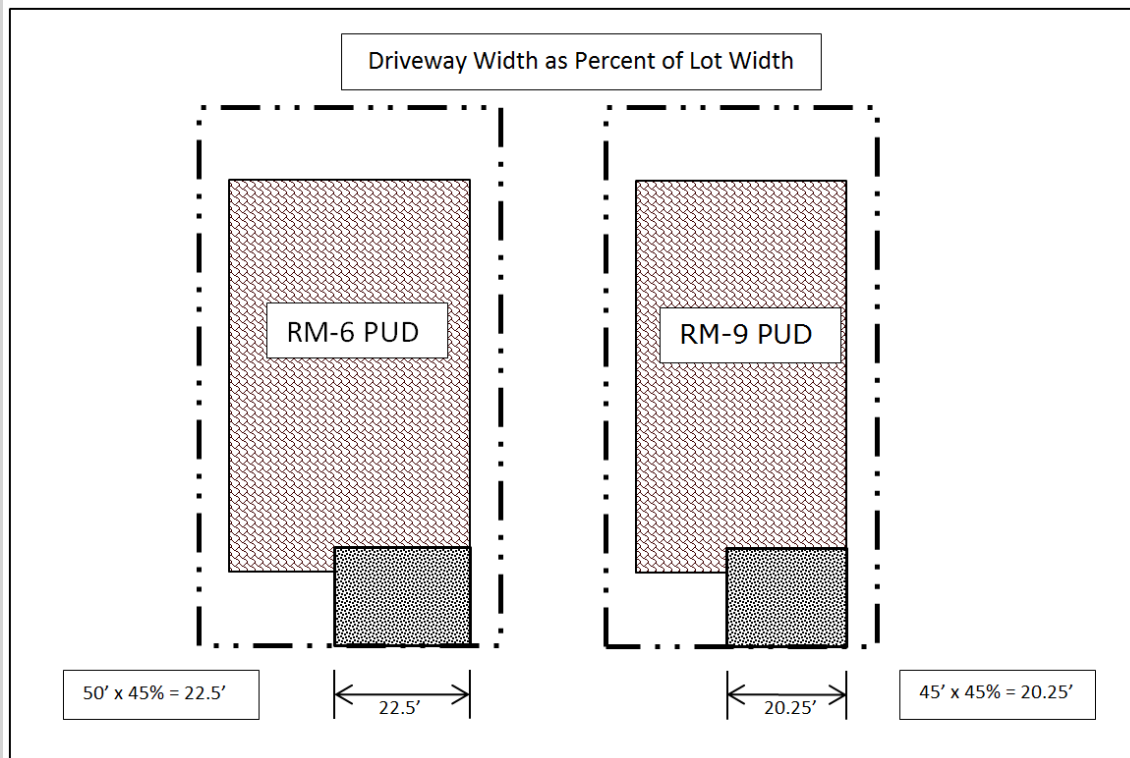
SUDC 122-137(p)(1) requires a turf recreational area of not less than 3.5 acres per 700 dwelling units.

Rationale:

- **At 252 dwelling units, this requirement is out of proportion to the community.**
- **The applicant is providing an amenitized 2.5 acre pocket park located in the center of the neighborhood that is to scale with the project.**
- **Project increases overall open space from 20% to 24%**

PUD OVERLAY

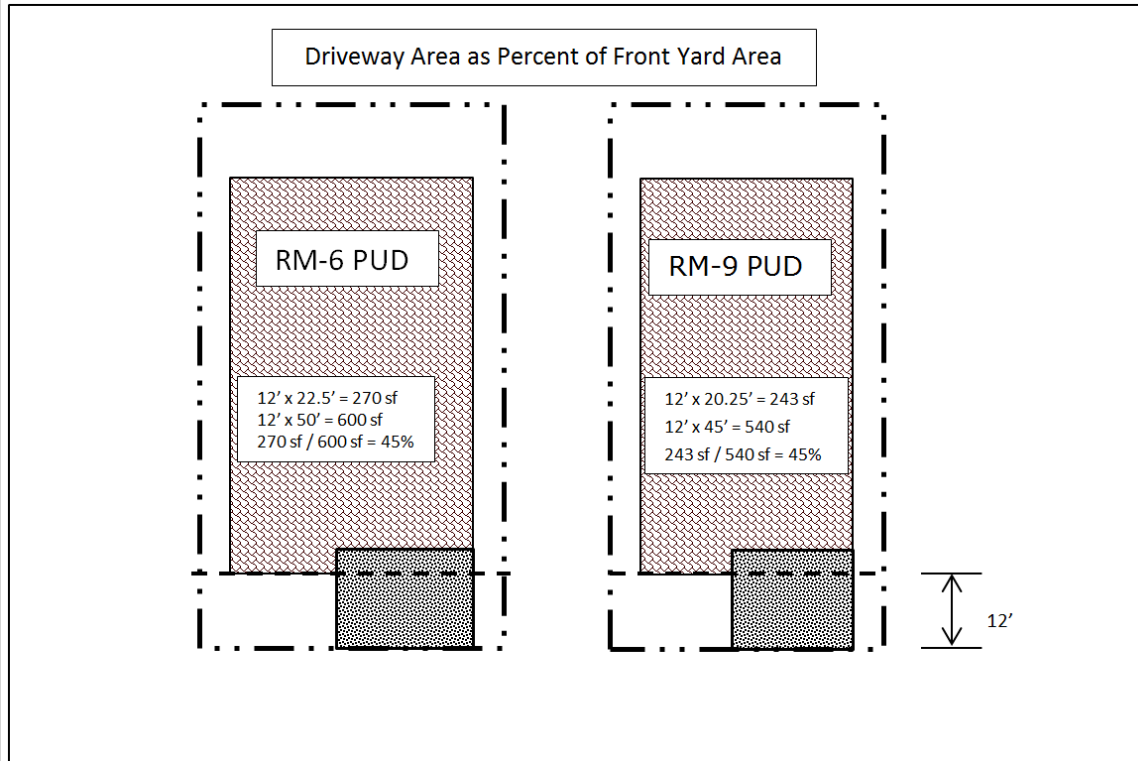
- Adjusts driveway width and area



Zone Change

PUD OVERLAY

- Adjusts driveway width and area



Zone Change

PUD OVERLAY

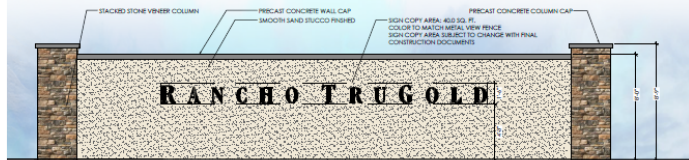
➤ Amends development standards

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

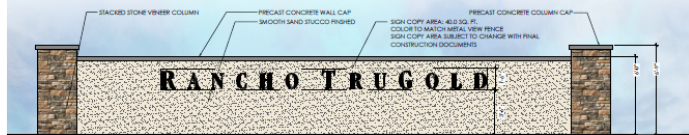
Development Standard	RM-6 City Base Standard	Proposed RM-6 PUD Standard	RM-9 City Base Standard	Proposed RM-9 PUD Standard
Maximum Density	6.0	5.0 (decrease in density)	9.0	5.0 (decrease in density)
Minimum Lot Area (sf) (1)	6,000	6,000	4,500	5,000 (increase in lot size)
Minimum Lot Width (ft)	50	50	40	45 (increase in lot width)
Minimum Lot Depth (ft)	100	100	100	100
Minimum Front Yard Setback (ft) (livable area/front-facing garage)	12/20	12/20	12/20	12/20
Minimum Side Yard Setback (ft)	TBD	5	TBD	5
Minimum Rear Yard Setback (ft)	20	20	20	20
Maximum Building Height (ft)	35	35	35	35

Zone Change

Zone Change



4 COMMUNITY ENTRY MONUMENT
SCALE: 3/8" = 1'-0"



5 NEIGHBORHOOD ENTRY MONUMENT
SCALE: 3/8" = 1'-0"

SCALE: NTS



FIGURE 5A-COMMUNITY MONUMENTS
12/20/17



P:\2017\1705-TRUMAN-KIDCAD\PLANNING\LVA-1705-FIGURE 5-BUILD DETAILS.dwg 04/25/2017



0' 200' 400' 800'

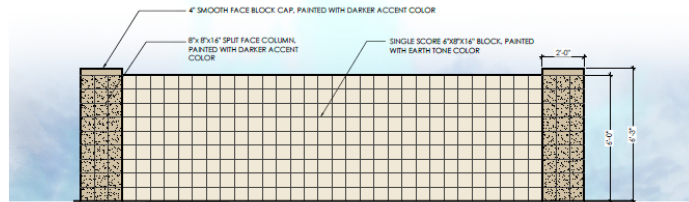


FIGURE 4-OPEN SPACE & AMENITIES PLAN
12/20/17

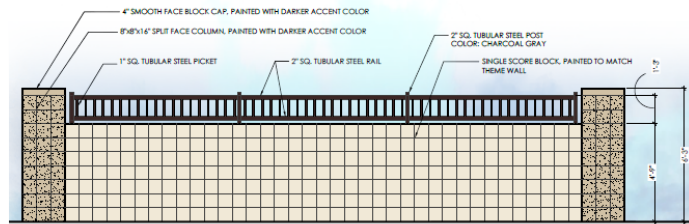


P:\2017\1705-TRUMAN-KIDCAD\PLANNING\LVA-1705-FIGURE 4-OPEN SPACE MASTER PLAN.dwg 04/25/2017

Zone Change



1 THEME WALL/COLUMN
SCALE: 1/2" = 1'-0"



2 PARTIAL VIEW FENCE
SCALE: 1/2" = 1'-0"

SCALE: NTS

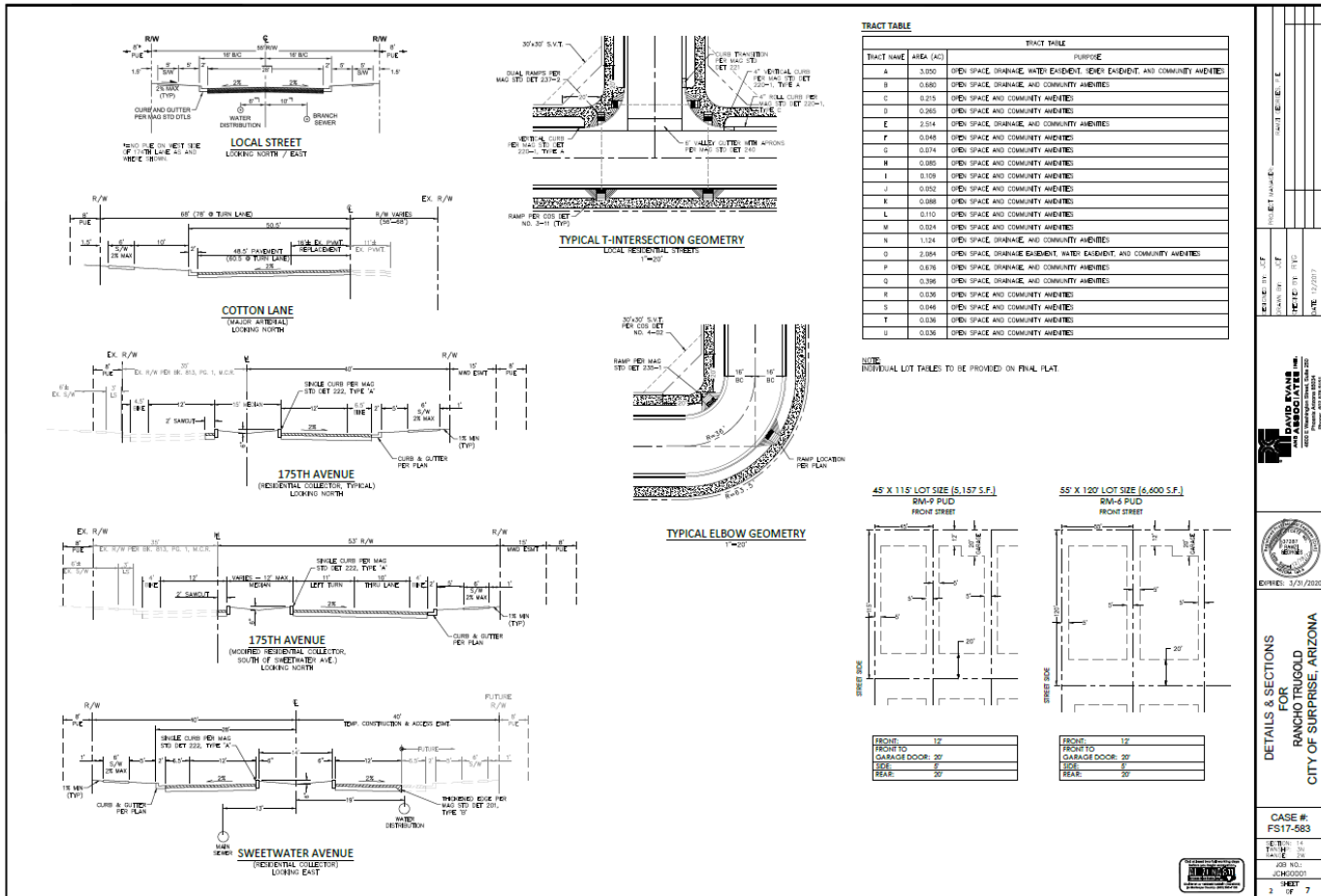


FIGURE 5-WALL DETAILS
12/20/17

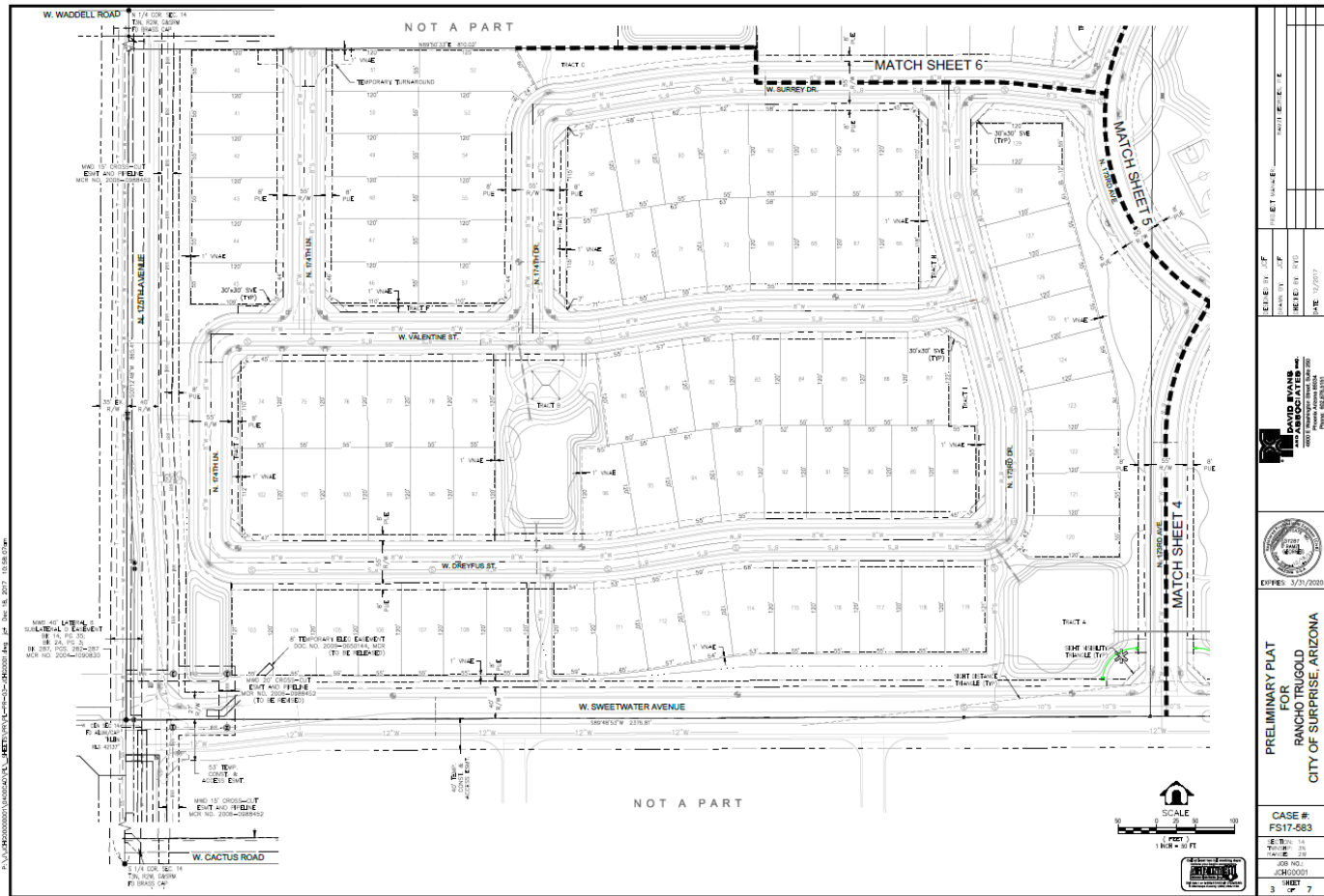


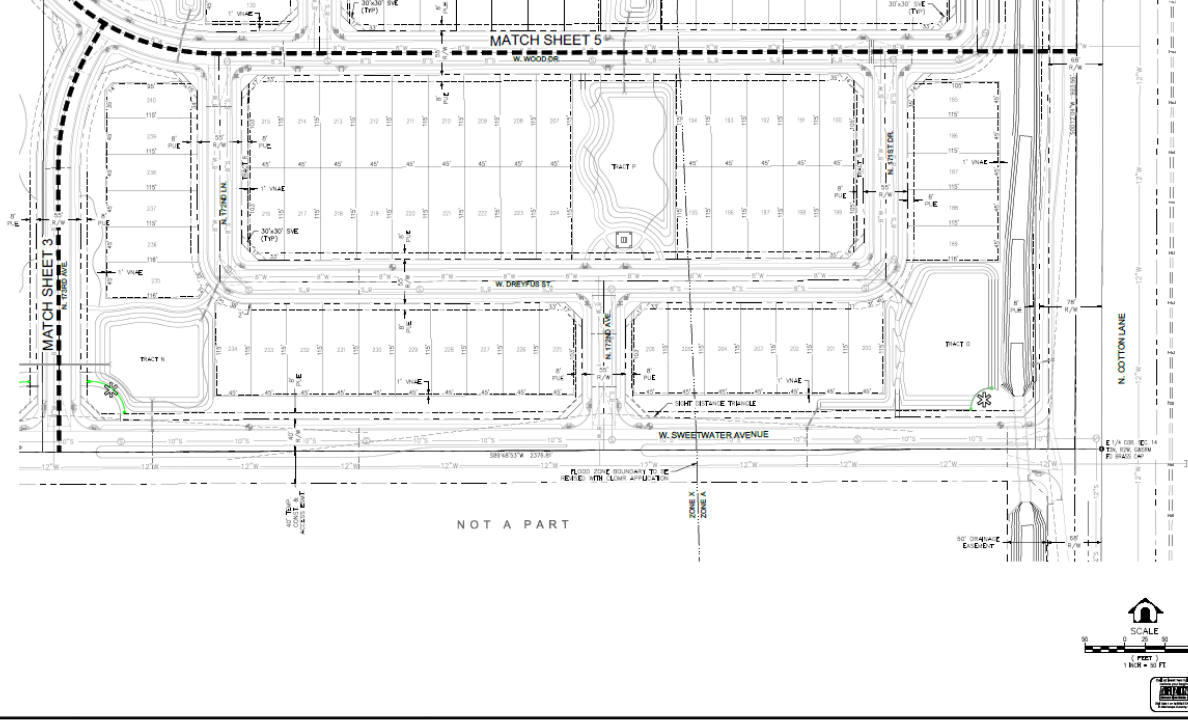
P:\2017\1725-TRUGOLD-432\2017\PLANNING\LVA-1725-FIGURE 5-WALL DETAILS.dwg Dec 20, 2017

Preliminary Plat



Preliminary Plat





CASE #:
FS17-583

SECTION: 14
TOWNSHIP: 3N
RANGE: 28

JOB NO.:
JCH00001

SHEET
4 OF 7

PRELIMINARY PLAT
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

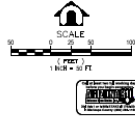
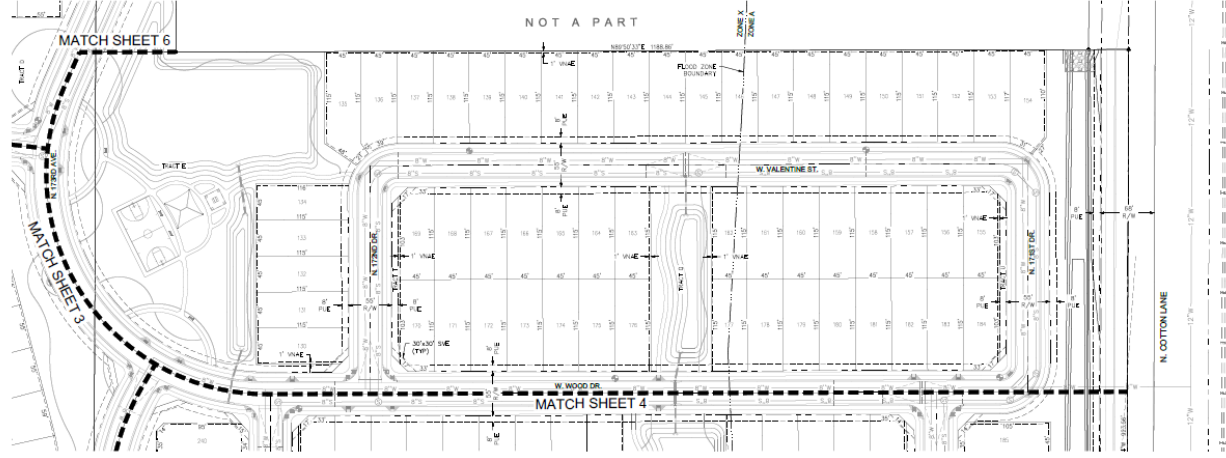
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**DAVID EVANS
AND ASSOCIATES INC.**
6600 E Washington Street, Suite 2500
Phoenix Arizona 85034
Phone: 602 476 5555

ORDER BY JCF	PROJECT NUMBER:	
ISSUED BY JCF	ISSUED DATE:	
REVIEW BY RYG		
DATE 12/2017		

Preliminary Plat



PRELIMINARY PLAT
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

CASE #:
FS17-583

JOB NO.:
JCHG0001

5 SHEET OF 7



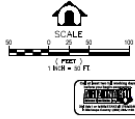
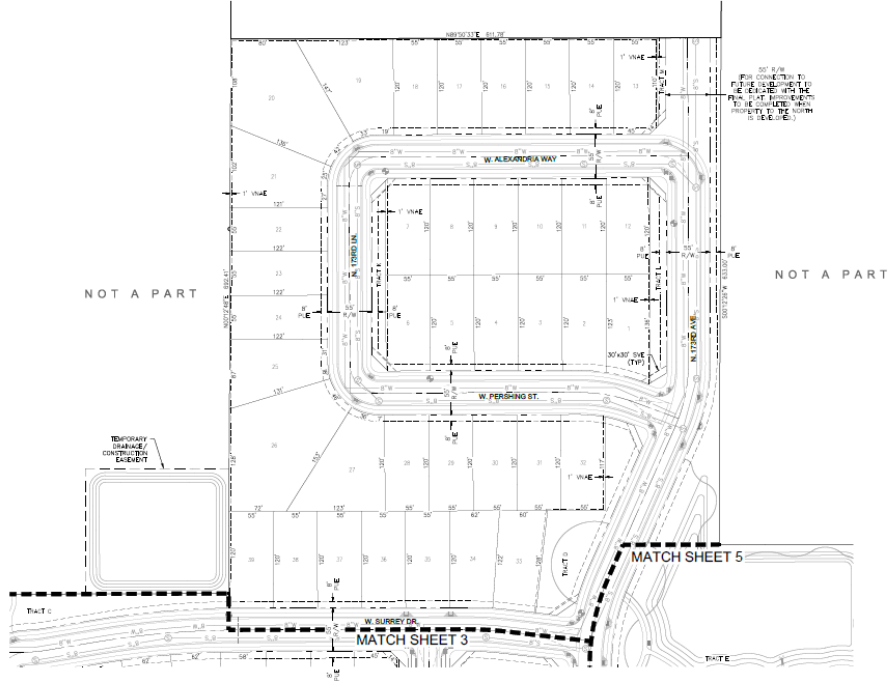
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DAVID EVANS
ASSOCIATED INC.
Washington Street, Suite 200
Phoenix, Arizona 85004

CHECKED BY: JCF
CHECKED BY: JCF
CHECKED BY: RYO
DATE: 12/2017

Preliminary Plat



PRELIMINARY PLAT
FOR
RANCHO TRUGOLD
CITY OF SURPRISE, ARIZONA

CASE #:
FS17-583

JOB NO.:
JCHG0001

6 SHEET OF 7

**DAVID EVANS
AND ASSOCIATES**
4000 E. Washington Street, Suite 200
Phoenix, Arizona 85034
Phone: 602/476-5551



OFFICE OF THE INSPECTOR GENERAL
DEPARTMENT OF DEFENSE
WASHINGTON, D.C. 20304-6000

DATE: 3/31/2020

CREATED BY: JCF	PROPERTY NUMBER: _____
ISSUED BY: JCF	MAINTENANCE: P. E
ORDERED BY: RYO	
DATE: 12/2017	

Preliminary Plat

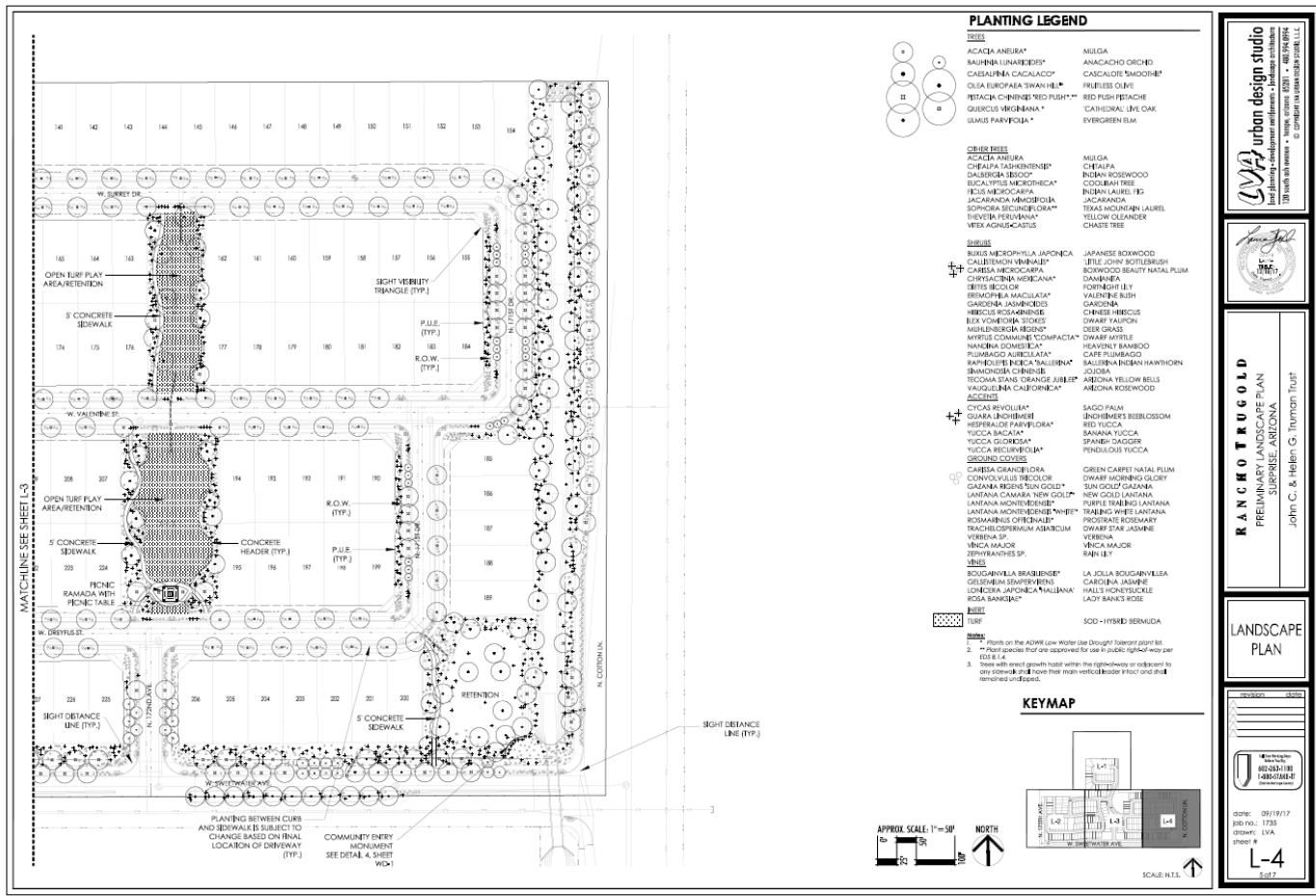


Preliminary Landscape

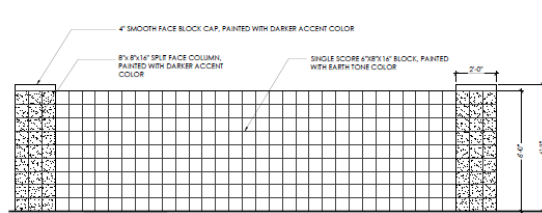
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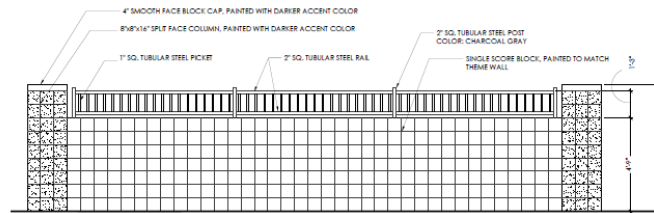
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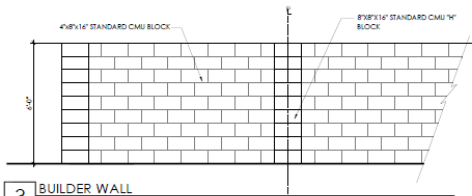
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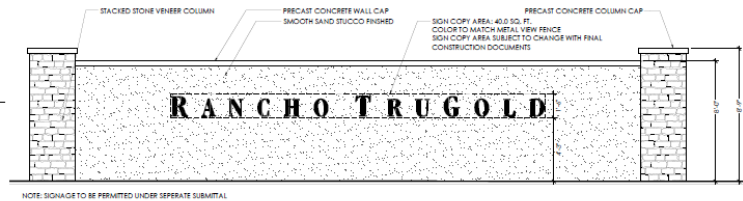
1 THEME WALL/COLUMN
SCALE: 1/2" = 1'-0"



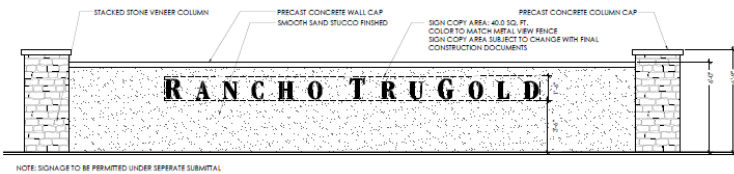
2 PARTIAL VIEW FENCE
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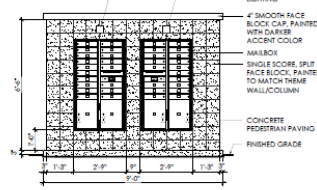
3 BUILDER WALL
SCALE: 1/2" = 1'-0"



4 COMMUNITY ENTRY MONUMENT
SCALE: 3/8" = 1'-0"



5 NEIGHBORHOOD ENTRY MONUMENT
SCALE: 3/8" = 1'-0"



6 MAILBOX
SCALE: 1/2" = 1'-0"

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RANCHO TRUGOLD
PRELIMINARY LANDSCAPE PLAN
SURPRISE, ARIZONA
John C. & Helen G. Turman, Trust

WALL
DETAILS



sheet: 09/19/17
job no.: 1735
drawing: LSA
sheet #
WD-1
7 of 7

CITY OF SURPRISE CASE #P17-583

Citizen Outreach:

October 19, 2017



Staff Recommendations:

Zone Change: **Approve** subject to stipulations “a” and “b”

Preliminary Plat: **Approve** subject to stipulations “a” thru “e”



SURPRISE
ARIZONA

**QUESTIONS OR
COMMENTS?**

Thank You



CITY OF SURPRISE
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

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

Board Meeting Date:	March 1, 2018	Contact Person:	Seth Dyson, Human Service & Community Vitality
Submitting Department:	CD Boards and Commissions	District:	Citywide
Staff Recommendations:	Approve		

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

Agenda Wording:

Consideration and action on an amendment to the Consolidated Plan 2015-19 Priorities.

Motion:

I move to recommend approval to the Mayor and City Council an amendment to the Consolidated Plan 2015-19 Priorities.

Background:

The Consolidated Plan encompasses eligible activities, the national objectives to meet, and the priority action items recommended by the community and the staff which should, in turn, meet the recommended HUD goals.

Financial Impact Statement:

This item will impact the FY2015 to FY2019 budgets by increasing the amount of funds that are dedicated to assist primarily low- and moderate-income people. There is no match requirement under this fund. Expenditures associated with this grant will be programmed in the budget at an amount equal to total grant revenues. Any associated operating costs of this item will be included in the grant expenditures or absorbed in the department's operating budget. Twenty percent of the grant amount will be requested for administrative expenses as part of the grant application. If awarded, these administrative funds will be used to supplement the general fund.

ATTACHMENTS:

Click to download

- ☐ [Staff Report](#)
- ☐ [Consolidated Plan Amendment 2015-19](#)
- ☐ [Public Engagement Form](#)

☐ [Presentation](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

Seth Dyson, Director, Human Service & Community Vitality

Alicia Rubio, Neighborhood Services Coordinator



HUMAN SERVICE AND COMMUNITY VITALITY

Date: March 1, 2018

To: Planning and Zoning Commission Members

From: Seth Dyson, Director
Jason Hughes, Acting Neighborhood Services Supervisor
Alicia Rubio, Neighborhood Services Coordinator

Re: CDBG Consolidated Plan Amendment 2015-2019

Introduction

As an entitlement city, Surprise receives a yearly allotment of Community Development Block Grant (CDBG) funding from the U.S. Department of Housing and Urban Development (HUD). Every year the City of Surprise must submit an Annual Action Plan. The Annual Action Plan is a concise summary of actions, activities, and the specific federal and non-federal resources that will be used each year to address the priority needs and specific goals identified by the Consolidated Plan. The Consolidated Plan is a combined plan and application to HUD for federal funds available to counties and cities under CDBG which includes all previous five years of annual action plans. Occasionally, an amendment is necessary to the Annual Action Plan and as a direct result the Consolidated Plan must also be amended.

In November 2008, the Council approved the Neighborhood Stabilization Program's (NSP) grant for federal funding to purchase foreclosed homes located in Special Planning Areas which were largely affected by foreclosure. The funds were federal stimulus dollars that supported down payment assistance, homebuyer education, rehabilitation and purchases of foreclosed homes. The homes were subsequently sold to qualified buyers per the NSP guidelines. The funds that were used to purchase the homes were then returned to the City as Program Income upon the sale. Surprise has been directed by U.S. Housing and Urban Development (HUD) to transfer program income to the Community Development Block Grant Program (CDBG) to sunset the NSP program. In order to spend these funds, Surprise will need to amend their Annual Action Plan and, as a result, amend the Consolidated Plan for 2015-2019.

Today's presentation to the Planning and Zoning Commission will provide information regarding the Consolidated Plan to assist the Commission in deciding if proposed projects meet grant criteria while filling community needs. Once the recommendation is determined, it will be forwarded to Council for consideration. Upon approval by City Council, the CDBG Administration, Neighborhood Improvement and Affordable Housing Activities will be submitted to HUD as part of the Consolidated Plan Amendment 2015-2019.

Background

CDBG administration and neighborhood improvements are carried out by city departments.

Affordable Housing activities are carried out by outside agencies. These projects will address the neighborhood commercial demolition and affordable housing needs identified in the city's Consolidated Plan. CDBG administration, neighborhood improvements and affordable housing projects will be used to implement activities that will improve the safety and quality of life of the residents living within the Heritage District. Although the Consolidated Plan lists Neighborhood Improvements as a priority, the city wanted to specifically list affordable housing, Gaines Park ballfield investment and possible commercial property / building demolition in the Surprise Heritage District as the project funding priorities considered today.

According to HUD regulations, CDBG funds may be used to provide Neighborhood Improvements (including labor, supplies, materials, project management and other costs) and Economic Development activities, provided the service will:

- Serve low to moderate income persons in the City of Surprise through area benefit or serving a particular clientele like seniors, youth and families
- Neighborhood Improvements
- Affordable Housing Opportunities

Funding Limit

The amount of Program Income to be included in the Annual Action Plan Amendment 2017-2018 is \$1,130,633. CDBG administration, neighborhood improvement projects and affordable housing opportunities are activities that will be carried out as part of this plan amendment.

Updated Actions

Staff's funding recommendations are as follows:

Administration **\$113,063**

Salaries, supplies, compliance needs

Neighborhood Improvement Projects **\$517,570**

Gaines Park ballfield and possible commercial property / building demolitions within the Surprise Heritage District

Affordable Housing Opportunities **\$500,000**

Provide assistance for development of affordable housing units in the Heritage District.

Total CDBG Transfer Amount **\$1,130,633**

Future Actions

- City Council Public Hearing and action: 3/20/18
- Submission to HUD as part of Consolidated Plan Amendment 2015-19 by April 16, 2018

Recommendations

Approval of Consolidated Plan Amendment 2015-19.



5 Year Strategic Plan

This document includes Narrative Responses to specific questions that grantees of the Community Development Block Grant, HOME Investment Partnership, Housing Opportunities for People with AIDS and Emergency Shelter Grants Programs must respond to in order to be compliant with the Consolidated Planning Regulations.

GENERAL

Executive Summary

5 Year Strategic Plan Executive Summary:

The City of Surprise Consolidated Plan is a comprehensive document that addresses the city's housing, community development and economic development needs. The Consolidated Plan 2015-19 comprehensively updates the previous four-year strategic plan covering the program years of 2010-2014. It also includes the Annual Action Plan 2017-2018 Amendment. The Consolidated Plan is a combination of housing, community development, and public service plan, and acts as an application for the following two U.S. Department of Housing and Urban Development (HUD) entitlement programs:

- Community Development Block Grant (CDBG)
- HOME Investment Partnerships Program

The City of Surprise 2017-2018 Annual Action Plan fiscal year runs from July 1, 2017 through June 30, 2018. The city's lead agency responsible for the plan's development is the Neighborhood Services Division, Human Service and Community Vitality Development Department. The executive summary includes objective and outcome expectations, as well as an evaluation of past performance. The 2015-2019 Consolidated Plan states how the city intends to utilize its HUD entitlement funds in the areas of housing, community development, public services, and administration. The Consolidated Plan ties HUD grant-funded spending to other funding initiatives in the city that benefit low- and moderate-income residents.

Key components of the plan are:

- Needs assessment.
- Strategic goals.
- Delivery system.
- Accountability and performance measurement.

Primary categories of need that are addressed in the plan are:

- Neighborhood Improvements
- Affordable Housing.
- Public Facility Improvements.
- Public services to special needs populations.

Summary of Objective and Outcome Expectations

The City of Surprise performance measurement system is tied to the city's Original Townsite Revitalization Plan objectives and to the annual budget process. In previous years, the Consolidated Plan provided an estimate of *output* measures in compliance with HUD's data system. The Consolidated Plan includes measures of performance to quantify longer-term goals by incorporating projected *outcome* measures. Quantifiable results-oriented goals for capital programs are tied to a unified framework for the benefit of low- and moderate-income residents.

- Preserve neighborhoods through infrastructure improvements in the targeted low-income area(s).
- Provide public services based on qualifications to special needs populations.
- Preserve neighborhoods through housing rehabilitation assistance to qualified homeowners.
- Preserve habitability of owner-occupied housing through emergency home repair assistance.
- Increase homeownership through downpayment assistance.
- Preserve affordability of quality rental housing through the Housing Choice Voucher program.
- Provide public service activities to city's youth, seniors, special needs persons, veterans, persons and families in crisis, and disabled persons through nonprofit agencies or other city departments.

Changes currently anticipated during the term of this plan:

- Inclusion of affordable housing activities through CDBG funding.

Past Performance Summary

Since becoming an entitlement community in 2006 for CDBG funding, infrastructure was identified as the city's highest priority and was aimed at the Original Townsite (OTS) of Surprise which is predominantly a low- to moderate-income resident area. Three street improvement projects, one park improvements and one public facility improvement project was carried out in the OTS. The infrastructure improvements aimed at creating a suitable living environment principally for the low- to moderate-income persons within the OTS of Surprise.

Implementation

This Consolidated Plan will serve as a guide for City of Surprise' endeavors in housing and community development during the next five years. The plan is updated annually through the adoption of the Annual Action Plan and may be amended from time to time as circumstances change. The Annual Action Plan and amendments to the Consolidated Plan will allow for public review and comment consistent with the Citizens Participation Plan.

Strategic Plan

Due every three, four, or five years (length of period is at the grantee's discretion) no less than 45 days prior to the start of the grantee's program year start date. HUD does not accept plans between August 15 and November 15.

Mission:

The mission of the City of Surprise is to enhance the quality of life through sustainable reconstruction of aging infrastructure systems and housing stock at the neighborhood level in order to develop a healthy living environment.

General Questions

1. Describe the geographic areas of the jurisdiction (including areas of low income families and/or racial/minority concentration) in which assistance will be directed.

Community Profile

2. Describe the basis for allocating investments geographically within the jurisdiction (or within the EMSA for HOPWA) (91.215(a)(1)) and the basis for assigning the priority (including the relative priority, where required) given to each category of priority needs (91.215(a)(2)). Where appropriate, the jurisdiction should estimate the percentage of funds the jurisdiction plans to dedicate to target areas.
3. Identify any obstacles to meeting underserved needs (91.215(a)(3)).

5 Year Strategic Plan General Questions response:

1.
Surprise is located in the northwest region of the Phoenix Metropolitan Area (*Figure 1*). The Surprise Planning Area is bordered on the east by the cities of Peoria and El Mirage, on the west by the town of Buckeye, on the south by the city of Glendale, and on the northwest by the town of Wickenburg. Sun City and Sun City West, both unincorporated communities are adjacent to the eastern boundary of the planning area. Located within the Surprise Planning Area are the unincorporated communities of Morristown, Circle City, and Wittmann.

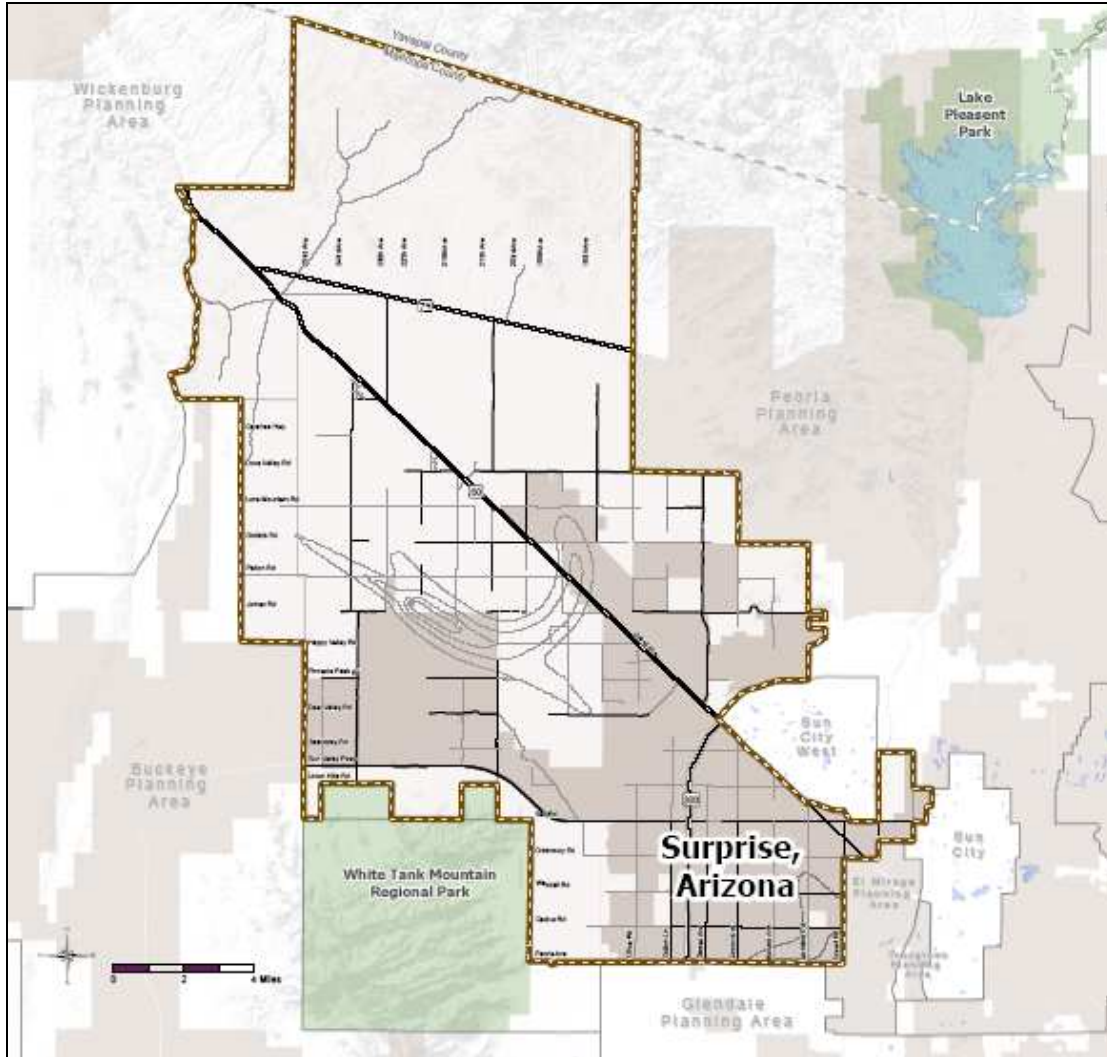


Figure 1: Surprise, AZ

Public facilities and infrastructure improvements with CDBG funds will only be undertaken in the Original Townsite (*Figure 2*) as area benefit activities targeted to the designated service area. This area is the only Census Tract (#608) in Surprise with a population that is more than 51% low and moderate income.



Figure 2: Original Townsite, Surprise, AZ

Economic development, public services, and other eligible activities under the CDBG program that directly benefit individuals will be provided throughout the community contingent on the eligibility of the applicant for the low- or moderate-income beneficiary requirement.

2.

The system for establishing the target areas for the CDBG-funded activities are predicated upon the following criteria:

- The Original Townsite area targeted for CDBG investments under this plan is the lowest income Census Tract in City of Surprise.
- The community has targeted this area for investment in the *Original Townsite Revitalization Plan* and *Surprise Revitalization Strategic Plan – Heritage Overlay*.
- Meeting the statutory requirements of the CDBG program.
- Coordination and leveraging of resources.
- Response to expressed needs.
- Long-term impact and sustainability.

- **The ability to measure or demonstrate progress and success.**

The steps in assignment of priority for specific activities selected for this plan are described further in the section on Priority Needs Analysis and Strategy.

3.

Funding Future

One of the main obstacles to meeting community needs is inadequate resources for programs. The decline in resources across sectors, including government agencies and foundations, due to the economic downturn has negatively impacted the quantity and quality of housing and community development services. Surprise has received an amount of \$1,130,633 in program income from the Neighborhood Stabilization Program that will be transferred into the CDBG program.

Other obstacles to meeting underserved needs include:

- 1. Insufficient resources to meet all of the legitimate and eligible needs identified.**
- 2. Private ownership of incompatible land uses within the revitalization area.**
- 3. Public ownership of the water system in the revitalization area by another municipality.**
- 4. Environmental issues related to the location of Grand Avenue (US 60), the Railroad, and Luke Airforce Base.**

Managing the Process (91.200 (b))

- 1. Lead Agency. Identify the lead agency or entity for overseeing the development of the plan and the major public and private agencies responsible for administering programs covered by the consolidated plan.**
- 2. Identify the significant aspects of the process by which the plan was developed, and the agencies, groups, organizations, and others who participated in the process.**
- 3. Describe the jurisdiction's consultations with housing, social service agencies, and other entities, including those focusing on services to children, elderly persons, persons with disabilities, persons with HIV/AIDS and their families, and homeless persons.**

***Note: HOPWA grantees must consult broadly to develop a metropolitan-wide strategy and other jurisdictions must assist in the preparation of the HOPWA submission.**

5 Year Strategic Plan Managing the Process response:

1.

The Neighborhood Services Division of the Human Service and Community Vitality Department is the lead agency for the City of Surprise Consolidated Plan. The Consolidated Plan along with the Annual Action Plan is authorized and approved by the Mayor and City Council upon the recommendation of the appointed Surprise Planning and Zoning Commission. Actions required

to accept and administer the CDBG and HOME funds are assigned to the City Manager or his designee.

2.

The City of Surprise has developed the Consolidated Plan with the input of several key city departments and divisions, county agencies, local nonprofit agencies and service organizations, community groups, boards and commissions, and citizens of Surprise.

To gather input from the citizens of Surprise, the city has adopted a Citizen Participation Plan that describes the citizens input process for the CDBG and HOME programs.

Significant steps in the planning process included:

- a) Creating a public participation plan to involve citizens of City of Surprise.**
- b) Establishment of needs assessment and priorities with other city departments and divisions.**
- c) Conducting a survey and followed up with a supplemental survey to citizens of the city and city officials to determine high priorities needs within Surprise.**
- d) Review of needs assessments and goals and objectives established with the Surprise Planning and Zoning Commission members.**
- e) Conducting a City Council work session.**

3.

During the development of the Consolidated Plan, the following groups and city departments were interviewed and or returned surveys. These groups represent or serve the populations whose needs were considered in the Consolidated Plan:

- a) City of Surprise Community Development Department.**
- b) City of Surprise Community and Recreation Services.**
- c) City of Surprise Economic Development Department.**
- d) City of Surprise Public Works Department.**
- e) Maricopa HOME Consortium.**
- f) The Housing Authority of Maricopa County.**
- g) Maricopa County Community Development.**
- h) City of Surprise Planning and Zoning Commission.**
- i) Original Town Site Stakeholder Group**
- j) Area Congressional Representative response for the survey.**

Citizen Participation (91.200 (b))

- 1. Provide a summary of the citizen participation process.**
- 2. Provide a summary of citizen comments or views on the plan.**
- 3. Provide a summary of efforts made to broaden public participation in the development of the consolidated plan, including outreach to minorities and non-English speaking persons, as well as persons with disabilities.**
- 4. Provide a written explanation of comments not accepted and the reasons why these comments were not accepted.**

*Please note that Citizen Comments and Responses may be included as additional files within the CPMP Tool.

5 Year Strategic Plan Citizen Participation response:

1.

Throughout the development of the Consolidated Plan, citizen input is encouraged. The City of Surprise provides its citizens many opportunities to provide input to the decision making process. Citizens are encouraged to attend and participate in City Council meetings, Planning and Zoning Commission meetings to solicit public input. These community engagement practices are designed to meet the needs and requirements of various programs and planning processes.

In accordance with 24 CFR 91.115(e), city staff has developed a Citizen Participation Plan (CPP) designed specifically for the Consolidated Plan. The CPP describes city policies relating to public hearings, public notices, and comment period. A schedule of citizen participation actions was developed at the beginning of the Consolidated Plan drafting.

Table 1: Schedule of Citizen Participation

Time	Activity
March 1, 2018	Planning and Zoning Commission Meeting on Consolidated Plan Priorities and Public Hearing
March 5-April 5, 2018 30 day public comment period on Annual Action Plan and Consolidated Plan	30 day comment period
March 20, 2018	City Council Public Hearing and approval.
April 2, 2018 Submission to HUD	

2.

TBD

3.

To assist in obtaining broad-based participation, a city's mailing distribution list is used. The list includes public, private and social service agencies and individuals that request notices of meetings and hearings. Staff publishes public notices for both public meetings and hearings in Daily News-Sun an everyday publishing newspaper, in accordance with city notification practices.

As per the CPP, the public hearings were held at accessible locations. Electronic copies of the plan were made available on the city's website. Printed public notices were distributed in English listing the locations where copies of the Consolidated Plan are available and inviting citizens to speak at the public meetings and hearings and/or submit written comments. Public meetings and hearings are accessible and sign language interpretation is available for public hearings and meetings by request.

4.

Citizens' request for highway access, road repairs, and other transportation improvements were not included as they do not qualify either under area

benefit or limited clientele benefit caveat for the low- to moderate-income persons in the city.

Institutional Structure (91.215 (i))

1. Explain the institutional structure through which the jurisdiction will carry out its consolidated plan, including private industry, nonprofit organizations, and public institutions.
2. Assess the strengths and gaps in the delivery system.
3. Assess the strengths and gaps in the delivery system for public housing, including a description of the organizational relationship between the jurisdiction and the public housing agency, including the appointing authority for the commissioners or board of housing agency, relationship regarding hiring, contracting and procurement; provision of services funded by the jurisdiction; review by the jurisdiction of proposed capital improvements as well as proposed development, demolition or disposition of public housing developments.

5 Year Strategic Plan Institutional Structure response:

1.

The City of Surprise is the clearinghouse and facilitator for the activities as described by the Consolidated Plan.

The Neighborhood Services Division of the Human Service and Community Vitality Development Department oversees the administration of all CDBG and HOME entitlement programs. The department is responsible for:

- **Program management and oversight.**
- **Interdepartmental coordination.**
- **Subrecipient contract administration and monitoring.**
- **Program evaluation.**
- **Consolidated Plan preparation, monitoring and evaluation.**
- **Required reporting to HUD.**

Other city departments and private agencies that participate in the implementation of federal-funded grants include:

- **City Council - formal approval body for policy making and release of funds.**
- **The Public Works Department - has experience in administering the procurement and Labor Standards requirements of federally funded projects.**
- **Financial management will be appropriately separated between the Finance Department and Human Service and Community Vitality Department.**
- **Maricopa HOME Consortium is the lead agency for HOME funds and activities.**
- **The Maricopa County Human Services Department provides services in workforce development and special transportation**

- The city is also served by a number of private nonprofit housing and health and human services providers and local church organizations like Habitat for Humanity, Benevilla and St. Mary's Food Bank.

2.

The major gap is the coordination of multiple organizations in regards with networking, ensuring that overlap of assignments is minimized, and facilitating more efficient use of resources.

The city is carrying out public service activities under the CDBG program through an open application process, effective management of the subrecipients would be a challenge and will likely require additional training.

3.

The Housing Authority of Maricopa County (HAMC) has two public housing developments in Surprise and administers Housing Choice Vouchers in the private rental market. The operations of HAMC in Surprise have not been formalized since Surprise incorporated as a city and an intergovernmental agreement would be beneficial.

Monitoring (91.230)

1. Describe the standards and procedures the jurisdiction will use to monitor its housing and community development projects and ensure long-term compliance with program requirements and comprehensive planning requirements.

5 Year Strategic Plan Monitoring response:

The City of Surprise Neighborhood Services Division of the Human Service and Community Vitality Department oversees all grant-funded housing and community development programs and will be responsible for all performance measurement activities.

The Neighborhood Services Division is also responsible for the timely implementation of activities and projects. The City of Surprise will ensure that all grant-funded projects are monitored for compliance with the applicable city, state and federal laws. This will be accomplished using the city's current monitoring/contract compliance process for federal programs.

The Neighborhood Services Division monitors all proposed activities to ensure long-term compliance with program requirements. The objectives of these monitoring are to make sure that activities:

1. **Comply with all regulations governing their administrative, financial, and programmatic operations.**
2. **Achieve their performance objectives within schedule and budget.**

General Monitoring Procedures

Annually, with the preparation of Consolidated Annual Performance and Evaluation Report (CAPER), the Neighborhood Services Division will review whether the specific objectives outlined in this strategic plan are being met. Furthermore, subsequent CAPERs will give an opportunity to address

community priorities and if adequate resources are available to meet the objectives.

The City of Surprise relies upon all grant-funded entities to complete a Quarterly Performance Report (QPR) to assess project progress. Accomplishments for the quarter are identified including measurable outcomes, client information, time frames and quarterly costs.

Neighborhood Services Division also administers the Integrated Disbursement and Information System (IDIS).

The more formal monitoring begins with a risk assessment of all grant-funded projects and subrecipient contracts. The risk assessment considers size of the grant contract, changes in organizational structure, and how long it has been since the last on-site monitoring.

For the HOME programs, included is an annual peer review for each member of the Maricopa HOME Consortium. The peer monitoring is performed by representatives from other participating communities and may take the form of either a desk review or an on-site monitoring.

Subrecipient Monitoring:

All subrecipients of CDBG and HOME funds will be subject to monitoring. Fiscal monitoring will include review and approval of budgets, compliance with executed grant agreements, review of fiscal reports on a monthly or quarterly basis, and a review of audits on an annual basis. Additional monitoring will occur through on-site visits. These site visits will occur as necessary but will be conducted at least once every six months.

All subrecipients must identify the personnel working on the project; keep accurate records and filing systems to document program benefits and compliance; maintain an appropriate financial management system; submit to an audit; and submit a final report at closeout.

Affirmative and Outreach Monitoring

The city's contract compliance officer is responsible for ensuring affirmative marketing and minority outreach including Section 3 and Minority/Women Business Enterprise compliance, by using existing standards and procedures as prescribed under the CDBG and HOME programs.

Priority Needs Analysis and Strategies (91.215 (a))

1. Describe the basis for assigning the priority given to each category of priority needs.
2. Identify any obstacles to meeting underserved needs.

5 Year Strategic Plan Priority Needs Analysis and Strategies response:

1.

The priorities presented were developed by:

- **Weighing the severity of the need among all groups and subgroups in the city.**
- **Analyzing the current social, economic and housing conditions.**
- **Analyzing the relative needs of low- and moderate-income families.**
- **Assessing the resources likely to be available over the next five years.**

Priorities are relative and follow these classifications:

High: The city plans to use available Consolidated Plan funds for activities to meet the need during the Five-Year Strategic Plan.

Medium: The city plans to use any available funds, including Consolidated Plan funds, for activities to meet the need during the Five-Year Strategic Plan, and can assist organizations in seeking funds to meet the need.

Low: The city does not envision using any available Consolidated Plan funds for activities to meet the need during the Five-Year Strategic Plan.

Identified Feasible Priorities Based on Survey:

- **Veteran Programs**
- **Transportation infrastructure improvements**
- **Job creation/retention**
- **Youth centers/Youth activities**
- **Neighborhood Clean up**
- **Literacy Programs**
- **Health care**
- **Health care services**
- **Senior Center programs/activities**

Identified Feasible Priorities Based on Needs and Urgency:

- **Neighborhood Improvements**
- **Job training.**
- **Water system Improvements in OTS.**
- **Drainage Improvements in OTS.**
- **Lighting Improvements in OTS.**
- **Street Improvements.**
- **Youth training program.**
- **Youth recreation program.**
- **Veteran services**

2.

Funding Future

One of the main obstacles to meeting community needs is inadequate resources for programs. The decline in resources across sectors, including government agencies and foundations, due to the economic downturn has

negatively impacted the quantity and quality of housing and community development services. Although federal stimulus funding helps mitigate this trend to some extent, resources for these programs will likely be limited for the near future.

Other obstacles to meeting underserved include:

- a) Insufficient resources to meet all of the legitimate and eligible needs identified.
- b) Private ownership of incompatible land uses within the revitalization area.
- c) Public ownership of the water system in the Revitalization area by another municipality.
- d) Environmental issues related to the location of Grand Avenue, the railroad, and Luke Airforce Base.

Lead-based Paint (91.215 (g))

1. Estimate the number of housing units that contain lead-based paint hazards, as defined in section 1004 of the Residential Lead-Based Paint Hazard Reduction Act of 1992, and are occupied by extremely low-income, low-income, and moderate-income families.
2. Outline actions proposed or being taken to evaluate and reduce lead-based paint hazards and describe how lead based paint hazards will be integrated into housing policies and programs, and how the plan for the reduction of lead-based hazards is related to the extent of lead poisoning and hazards.

5 Year Strategic Plan Lead-based Paint response:

1.

Assessment of the outside parameters of lead paint hazard for the City of Surprise has been calculated in the chart below utilizing data from the 2000 Census applied to the findings of a national study titled 'The prevalence of Lead Based Paint Hazards in U.S. Housing.'

Table 2:

Sample	Region	Surprise	Prevalence		Surprise	
			Sample	%w/hazards	Owner	Renter
Western Region			Western region	15%		
Owner renter split			Construction year			
Owner	69	88%	1978+w/hazards	3%	302	33
Renter	30	12%	1960-1977	8%	63	28
In poverty	14%	8.70%	1940-1959	43%	53	24
Income			Before 1940	69%	19	0
0-\$19,999	20%		Tenure			
\$20-39,999	27%		Owner	23%	437	
\$40-+	44%		Renter	30%		84
Calculations are derived from 2000 Census based on findings of "The prevalence of Lead Based Paint Hazards in U.S Housing" October 2002.			In poverty	38%	166	32
			W/children	25%	109	21

The Arizona Department of Health Services maintains records on the number of children reported to have elevated blood levels from any source. Since the year 2008 - 2014, sixty-seven (67) children have tested positive for elevated levels of lead in the bloodstream. During that time, two of the tests resulted in environmental investigations at the home. Neither of the home investigations revealed an apparent source for the lead.

2.

Housing units assisted under any and all programs covered under this Consolidated Plan are inspected and/or tested prior to assistance as follows:

- a. The Housing Authority of Maricopa County inspects all rental units prior to occupancy by households who have Housing Choice Vouchers. For units built before 1978, chipped or peeling paint must be removed prior to occupancy.**
- b. For units built before 1978, chipped or peeling paint must be removed prior to occupancy. Renter and owner-occupied units built before 1978 that are being rehabilitated with CDBG or HOME funds must be professionally assessed and abated as part of the assisted contract.**
- c. Lead-based paint is not allowed or sold for residential construction after 1978. Newly constructed single-family or multifamily residences assisted with funding from the covered grants will be free of lead paint hazards.**

HOUSING

Housing Needs (91.205)

*Please also refer to the Housing Needs Table in the Needs.xls workbook

1. Describe the estimated housing needs projected for the next five year period for the following categories of persons: extremely low-income, low-income, moderate-income, and middle-income families, renters and owners, elderly persons, persons with disabilities, including persons with HIV/AIDS and their families, single persons, large families, public housing residents, victims of domestic violence, families on the public housing and section 8 tenant-based waiting list, and discuss specific housing problems, including: cost-burden, severe cost- burden, substandard housing, and overcrowding (especially large families).
2. To the extent that any racial or ethnic group has a disproportionately greater need for any income category in comparison to the needs of that category as a whole, the jurisdiction must complete an assessment of that specific need. For this purpose, disproportionately greater need exists when the percentage of persons in a category of need who are members of a particular racial or ethnic group is at least ten percentage points higher than the percentage of persons in the category as a whole.

5 Year Strategic Plan Housing Needs response:

Effective July 1, 2006, City of Surprise became a member of the Maricopa HOME Consortium through an Intergovernmental Agreement. Federal regulations (24 CFR 91.405) require that housing needs assessment(s) be

consolidated for the entire Consortium Service Area. See the 2015-2019 Consolidated Plan for the Maricopa HOME Consortium. The City of Surprise has listed Affordable Housing Opportunities as a high priority through the Consolidated Plan Amendment process for the Annual Action Plan 4 2017-2018

Priority Housing Needs (91.215 (b))

1. Identify the priority housing needs and activities in accordance with the categories specified in the Housing Needs Table (formerly Table 2A). These categories correspond with special tabulations of U.S. census data provided by HUD for the preparation of the Consolidated Plan.
2. Provide an analysis of how the characteristics of the housing market and the severity of housing problems and needs of each category of residents provided the basis for determining the relative priority of each priority housing need category.

Note: Family and income types may be grouped in the case of closely related categories of residents where the analysis would apply to more than one family or income type.

3. Describe the basis for assigning the priority given to each category of priority needs.
4. Identify any obstacles to meeting underserved needs.
5. Year Strategic Plan Priority Housing Needs response:

Effective July 1, 2006, the City of Surprise became a member of the Maricopa HOME Consortium through an Intergovernmental Agreement. Federal regulations (24 CFR 91.405) require that housing needs assessments be consolidated for the entire Consortium Service Area. See the 2015-2019 Consolidated Plan for the Maricopa HOME Consortium. The City of Surprise has listed Affordable Housing Opportunities as a high priority through the Consolidated Plan Amendment process for the Annual Action Plan Year 3 2017-2018 and Annual Action Plan Year 4 2018-2019.

Housing Market Analysis (91.210)

*Please also refer to the Housing Market Analysis Table in the Needs.xls workbook

1. Based on information available to the jurisdiction, describe the significant characteristics of the housing market in terms of supply, demand, condition, and the cost of housing; the housing stock available to serve persons with disabilities; and to serve persons with HIV/AIDS and their families. Data on the housing market should include, to the extent information is available, an estimate of the number of vacant or abandoned buildings and whether units in these buildings are suitable for rehabilitation.
2. Describe the number and targeting (income level and type of household served) of units currently assisted by local, state, or federally funded programs, and an assessment of whether any such units are expected to be lost from the assisted housing inventory for any reason, (i.e. expiration of Section 8 contracts).

3. Indicate how the characteristics of the housing market will influence the use of funds made available for rental assistance, production of new units, rehabilitation of old units, or acquisition of existing units. Please note, the goal of affordable housing is not met by beds in nursing homes.

5 Year Strategic Plan Housing Market Analysis responses:

Effective July 1, 2006, the City of Surprise became a member of the Maricopa HOME Consortium through an Intergovernmental Agreement. Federal regulations (24 CFR 91.405) require that housing needs assessments be consolidated for the entire Consortium Service Area. See the 2015-2019 Consolidated Plan for the Maricopa HOME Consortium. The City of Surprise has listed Affordable Housing Opportunities as a high priority through the Consolidated Plan Amendment process for the Annual Action Plan Year 3 2017-2018 and Annual Action Plan Year 4 2018-2019.

Specific Housing Objectives (91.215 (b))

1. Describe the priorities and specific objectives the jurisdiction hopes to achieve over a specified time period.
2. Describe how Federal, State, and local public and private sector resources that are reasonably expected to be available will be used to address identified needs for the period covered by the strategic plan.

5 Year Strategic Plan Specific Housing Objectives response:

Specific Housing Objectives for the period of the Consolidated Plan include:

Table 3:			
National Objective met by: <i>Providing decent housing.</i>			
Desired outcome: <i>An increase in the number of quality affordable units.</i>			
Need to be addressed/ From the Needs Assessment	Goal to address high and medium priority needs	Activity and General Location	Anticipated sources of funding
Quality owner-occupied housing	Increase the quality of owner-occupied housing in older neighborhoods	Major and Minor Housing rehabilitation to low- and moderate-income households primarily located in the Original Townsite Area.	CDBG, HOME, Private loans and Owners' funds
Quality owner-occupied housing	Increase the availability of affordable owner-occupied housing	Support to the development of housing and neighborhoods by Habitat for Humanity.	Private financing, Sweat equity, HOME funds, and NSP Program

Quality owner-occupied housing	Preserve habitability of owner-occupied housing	Emergency repair assistance.	CDBG Funds, HOME Funds
Affordable rental housing	Increase the supply of affordable rental housing	Acquisition/ rehabilitation assistance to preserve units affordable to low- and moderate-income renters as opportunities are presented by nonprofit housing providers.	HOME, CDBG funds, affordable housing bonds, private financing
Affordable rental housing	Increase the supply of affordable rental housing	Acquisition/ new development assistance to add to the number of units affordable to low- and moderate-income renters.	HOME, CDBG funds, Affordable housing bonds, Private financing, Low Income Housing Tax Credits

See the chart below for the performance measures for the above objectives.

Five-year Goals for Housing

Table 4: Priority Housing Needs (Households)		Priority		Unmet Need
Renter	Small Related	0-30%	H	270
		31-50%	H	251
		51-80%	M	348
	Large Related	0-30%	H	72
		31-50%	H	79
		51-80%	H	81
	Elderly	0-30%	H	108
		31-50%	H	167
		51-80%	M	137
	All Other	0-30%	H	261
		31-50%	H	242
		51-80%	M	319
Owner	Small Related	0-30%	M	128
		31-50%	H	157
		51-80%	H	347
	Large Related	0-30%	M	46
		31-50%	H	69
		51-80%	H	107

	Elderly	0-30%	H	219
		31-50%	H	283
		51-80%	H	296
	All Other	0-30%	M	110
		31-50%	H	77
		51-80%	H	179
Non-Homeless Special needs	Elderly	0-80%	H	126
	Frail Elderly	0-80%	H	168
	Severe Mental Illness	0-80%	H	165
	Physical Disability	0-80%	M	53
	Developmental Disability	0-80%	M	105
	Alcohol/Drug Abuse	0-80%	H	96
	HIV/AIDS	0-80%	M	15
	Victims of Domestic Violence	0-80%	H	45

Table 5: Priority Needs	5-YR. Goal Plan/Act	Year 1 Goal Plan/Act	Year 2 Goal Plan/Act	Year 3 Goal Plan/Act	Year 4 Goal Plan/Act	Year 5 Goal Plan/Act
Renters	119	24	24	24	24	24
0-30%	33	7	7	7	7	7
31-50%	17	3	3	3	3	3
51-80%	69	14	14	14	14	14
owners	135	27	27	27	27	27
0-30%	40	8	8	8	8	8
31-50%	56	11	11	11	11	11
51-80%	39	8	8	8	8	8
Homeless						
Individuals	0	0	0	0	0	0
Families	0	0	0	0	0	0
Non-Homeless Special Needs						
Elderly	64	13	13	13	13	13
Frail Elderly	23	5	5	5	5	5
Severe Mental Illness	4	1	1	1	1	1
Physical Disability	18	4	4	4	4	4
Developmental Disability	13	3	3	3	3	3
Alcohol/Drug Abuse	5	1	1	1	1	1
HIV/AIDS	2	0	0	0	0	0
Victims of Domestic Violence	5	1	1	1	1	1
Total	134	27	27	27	27	27

The above two tables are derived from the Maricopa Consortium Consolidated Plan for 2015-19. The estimated number of people in Surprise for each need category is determined by multiplying the category's county population by the percentage of Surprise population that is in the Maricopa County- 3%. The estimated number are derived from 2007 – 2011 CHAS runs extrapolated to 2011.

Table 6: Priority Needs	5-YR. Goal Plan/Act	Year 1 Goal Plan/Act	Year 2 Goal Plan/Act	Year 3 Goal Plan/Act	Year 4 Goal Plan/Act	Year 5 Goal Plan/Act
CDBG						
Acquisition of existing rental units						
Production of new rental units						
Rehabilitation of existing rental units						
Rental assistance						
Acquisition of existing owner units						
Production of new owner units						
Rehabilitation of existing owner units	74	24	10	10	15	15
Homeownership assistance						
HOME						
Acquisition of existing rental units						
Production of new rental units						
Rehabilitation of existing rental units						
Rental assistance						
Acquisition of existing owner units						
Production of new owner units						
Rehabilitation of existing owner units	15	3	3	3	3	3
Homeownership assistance						
HOPWA						
Rental assistance						
Short term rent/mortgage utility payments						
Facility based housing development	City of Surprise does not receive HOPWA funding					
Facility based housing operations						
Supportive Services						
Other						
NSP						
Production of new owner units	2	1	1	-	N/A	N/A
Homeownership assistance	24	8	8	8	N/A	N/A

Surprise is not eligible for funding for Housing Opportunities for People with AIDS and does not track housing assistance or set housing goals for persons with AIDS separate from housing assistance for persons with other

disabilities. Section 8 regulations do not authorize the collection of this information.

The goals listed in the chart above continue services and levels of service that have been provided in the past under operating agreements with Maricopa County Community Development, the Housing Authority of Maricopa and nonprofit housing providers.

2.

Resources anticipated to address these objectives include:

1. HUD funding

- a. Community Development Block Grants.**
- b. HOME Investment Partnerships funds.**
- c. Neighborhood Stabilization Program (NSP).**
- d. Housing Choice Vouchers.**

2. Low Income Housing Tax Credits issued through the state.

3. State and County IDA funding from

- a. Multifamily.**
- b. Single-Family bonds.**
- c. Mortgage Credit Certificates.**

4. Private funding

- a. Family Self-sufficiency escrow accounts.**
- b. IDEA grants.**
- c. Individual Development Accounts.**
- d. Unrestricted funds leveraged and matched by nonprofit housing providers.**
- e. Subsidized and unsubsidized private investments by private investors.**

Needs of Public Housing (91.210 (b))

In cooperation with the public housing agency or agencies located within its boundaries, describe the needs of public housing, including the number of public housing units in the jurisdiction, the physical condition of such units, the restoration and revitalization needs of public housing projects within the jurisdiction, and other factors, including the number of families on public housing and tenant-based waiting lists and results from the Section 504 needs assessment of public housing projects located within its boundaries (i.e. assessment of needs of tenants and applicants on waiting list for accessible units as required by 24 CFR 8.25). The public housing agency and jurisdiction can use the optional Priority Public Housing Needs Table (formerly Table 4) of the Consolidated Plan to identify priority public housing needs to assist in this process.

5 Year Strategic Plan Needs of Public Housing response:

The Housing Authority of Maricopa County (HAMC) administers the public housing and Section 8 subsidized housing programs for City of Surprise. Surprise' housing activities are planned and reported through the Maricopa Consortium Plan. See the 2015-2019 Consolidated Plan for the Maricopa HOME Consortium for more information.

Public Housing Strategy (91.210)

1. Describe the public housing agency's strategy to serve the needs of extremely low-income, low-income, and moderate-income families residing in the jurisdiction served by the public housing agency (including families on the public housing and section 8 tenant-based waiting list), the public housing agency's strategy for addressing the revitalization and restoration needs of public housing projects within the jurisdiction and improving the management and operation of such public housing, and the public housing agency's strategy for improving the living environment of extremely low-income, low-income, and moderate families residing in public housing.
2. Describe the manner in which the plan of the jurisdiction will help address the needs of public housing and activities it will undertake to encourage public housing residents to become more involved in management and participate in homeownership. (NAHA Sec. 105 (b)(11) and (91.215 (k))
3. If the public housing agency is designated as "troubled" by HUD or otherwise is performing poorly, the jurisdiction shall describe the manner in which it will provide financial or other assistance in improving its operations to remove such designation. (NAHA Sec. 105 (g))

5 Year Strategic Plan Public Housing Strategy response:

1. **Not Applicable**
2. **Not Applicable**
3. **HAMC is not designated as a "troubled agency."**

Barriers to Affordable Housing (91.210 (e) and 91.215 (f))

1. Explain whether the cost of housing or the incentives to develop, maintain, or improve affordable housing are affected by public policies, particularly those of the local jurisdiction. Such policies include tax policy affecting land and other property, land use controls, zoning ordinances, building codes, fees and charges, growth limits, and policies that affect the return on residential investment.
2. Describe the strategy to remove or ameliorate negative effects of public policies that serve as barriers to affordable housing, except that, if a State requires a unit of general local government to submit a regulatory barrier assessment that is substantially equivalent to the information required under this part, as determined by HUD, the unit of general local government may submit that assessment to HUD and it shall be considered to have complied with this requirement.;

5 Year Strategic Plan Barriers to Affordable Housing response:

1.
While the city's housing supply is large enough to meet demand, there is a significant disconnect between the supply of housing units and the location, price, and quality of the housing units. The housing stock has been growing and stands at 52,384 units as of 2013. This includes single-family units, multi-family units and mobile homes. An average of 2511 units has been built each year from 2008 through 2013. The average household size is now 2.75. More than half of Surprise's housing stock was built after 2000.

The City of Surprise is recognized for its affordability. First time homebuyers have been able to purchase quality homes in master planned neighborhoods due to affordable pricing and homebuyer assistance programs. Monitoring housing affordability as the city matures will be important. The key is to ensure the widest range of housing supply possible to meet the needs of a growing city including low- and moderate-income households.

The main contributors to the cost of housing in Surprise are:

- The cost of vacant land and built residential property.
- The lack of a supply of land available for residential development outside of master-planned communities.
- The lack of supply of a variety of housing.
- The lack of available credit for low- and moderate-income persons.

The growth of Surprise over the last 15 years can only be described as extreme. Much of this development has been in master-planned subdivisions with high amenities and innovative development patterns. The city's development standards are strict enough to support long-term neighborhood quality in the intense Arizona sun. The result has been rapid increases in the cost of housing that has been exacerbated by the recent run-up in the value of resale housing in all of Maricopa County.

The following table, although not required, documents the city's standing pursuant to the April 21, 2004 Federal Register Notice on the Affordable Communities Initiative.

America's Affordable Communities Initiative	U.S. Department of Housing and Urban Development	OMB approval no. 2535-0120 (exp. 11/30/2014)
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Public reporting burden for this collection of information is estimated to average 3 hours. This includes the time for collecting, reviewing, and reporting the data. The information will be used to encourage applicants to pursue and promote efforts to remove regulatory barriers to affordable housing. Response to this request for information is required in order to receive the benefits to be derived. This agency may not collect this information, and you are not required to complete this form unless it displays a currently valid OMB control number.

Questionnaire for HUD's Initiative on Removal of Regulatory Barriers

Part A. Local Jurisdictions. Counties Exercising Land Use and Building Regulatory Authority and Other Applicants Applying for Projects Located in such Jurisdictions or Counties

	1	2
1. Does your jurisdiction's comprehensive plan (or in the case of a tribe or TDHE, a local Indian Housing Plan) include a "housing element? A local comprehensive plan means the adopted official statement of a legislative body of a local government that sets forth (in words, maps, illustrations, and/or tables) goals, policies, and guidelines intended to direct the present and future physical, social, and economic development that occurs within its planning jurisdiction and that includes a unified physical plan for the public development of land and water. If your jurisdiction does not have a local comprehensive plan with a "housing element," please enter no. If no,	☐ No	☒ Yes

skip to question # 4.		
2. If your jurisdiction has a comprehensive plan with a housing element, does the plan provide estimates of current and anticipated housing needs, taking into account the anticipated growth of the region, for existing and future residents, including low, moderate and middle income families, for at least the next five years?	☒ No	☐ Yes
3. Does your zoning ordinance and map, development and subdivision regulations or other land use controls conform to the jurisdiction's comprehensive plan regarding housing needs by providing: a) sufficient land use and density categories (multifamily housing, duplexes, small lot homes and other similar elements); and, b) sufficient land zoned or mapped "as of right" in these categories, that can permit the building of affordable housing addressing the needs identified in the plan? (For purposes of this notice, "as-of-right," as applied to zoning, means uses and development standards that are determined in advance and specifically authorized by the zoning ordinance. The ordinance is largely self-enforcing because little or no discretion occurs in its administration.). If the jurisdiction has chosen not to have either zoning, or other development controls that have varying standards based upon districts or zones, the applicant may also enter yes.	☐ No	☒ Yes
4. Does your jurisdiction's zoning ordinance set minimum building size requirements that exceed the local housing or health code or is otherwise not based upon explicit health standards?	☐ Yes	☒ No
5. If your jurisdiction has development impact fees, are the fees specified and calculated under local or state statutory criteria? If no, skip to question #7. Alternatively, if your jurisdiction does not have impact fees, you may enter yes.	☐ No	☒ Yes
6. If yes to question #5, does the statute provide criteria that sets standards for the allowable type of capital investments that have a direct relationship between the fee and the development (nexus), and a method for fee calculation?	☐ No	☒ Yes
7. If your jurisdiction has impact or other significant fees, does the jurisdiction provide waivers of these fees for affordable housing?	☒ No	☐ Yes
8. Has your jurisdiction adopted specific building code language regarding housing rehabilitation that encourages such rehabilitation through graduated regulatory requirements applicable as different levels of work are performed in existing buildings? Such code language increases regulatory requirements (the additional improvements required as a matter of regulatory policy) in proportion to the extent of rehabilitation that an owner/developer chooses to do on a voluntary basis. For further information see HUD publication: "Smart Codes in Your Community: A Guide to Building Rehabilitation Codes" (www.huduser.org/publications/destech/smartcodes.html)	☒ No	☐ Yes

9. Does your jurisdiction use a recent version (i.e. published within the last 5 years or, if no recent version has been published, the last version published) of one of the nationally recognized model building codes (i.e. the International Code Council (ICC), the Building Officials and Code Administrators International (BOCA), the Southern Building Code Congress International (SBCI), the International Conference of Building Officials (ICBO), the National Fire Protection Association (NFPA)) without significant technical amendment or modification. In the case of a tribe or TDHE, has a recent version of one of the model building codes as described above been adopted or, alternatively, has the tribe or TDHE adopted a building code that is substantially equivalent to one or more of the recognized model building codes? Alternatively, if a significant technical amendment has been made to the above model codes, can the jurisdiction supply supporting data that the amendments do not negatively impact affordability.	☐ No	☒ Yes
10. Does your jurisdiction's zoning ordinance or land use regulations permit manufactured (HUD-Code) housing "as of right" in all residential districts and zoning classifications in which similar site-built housing is permitted, subject to design, density, building size, foundation requirements, and other similar requirements applicable to other housing that will be deemed realty, irrespective of the method of production?	☒ No	☐ Yes
11. Within the past five years, has a jurisdiction official (i.e., chief executive, mayor, county chairman, city manager, administrator, or a tribally recognized official, etc.), the local legislative body, or planning commission, directly, or in partnership with major private or public stakeholders, convened or funded comprehensive studies, commissions, or hearings, or has the jurisdiction established a formal ongoing process, to review the rules, regulations, development standards, and processes of the jurisdiction to assess their impact on the supply of affordable housing?	☒ No	☐ Yes
12. *Within the past five years, has the jurisdiction initiated major regulatory reforms either as a result of the above study or as a result of information identified in the barrier component of the jurisdiction's "HUD Consolidated Plan?" If yes, attach a brief list of these major regulatory reforms.	☐ No	☒ Yes
13. Within the past five years has your jurisdiction modified infrastructure standards and/or authorized the use of new infrastructure technologies (e.g. water, sewer, street width) to significantly reduce the cost of housing?	☒ No	☐ Yes
14. Does your jurisdiction give "as-of-right" density bonuses sufficient to offset the cost of building below market units as an incentive for any market rate residential development that includes a portion of affordable housing? (As applied to density bonuses, "as of right" means a density bonus granted for a fixed percentage or number of additional market rate dwelling units in exchange for the provision of a fixed number or percentage of affordable dwelling units and without	☒ No	☐ Yes

the use of discretion in determining the number of additional market rate units.)		
15. Has your jurisdiction established a single, consolidated permit application process for housing development that includes building, zoning, engineering, environmental, and related permits? Alternatively, does your jurisdiction conduct concurrent, not sequential, reviews for all required permits and approvals?	☐ No	☒ Yes
16. Does your jurisdiction provide for expedited or "fast track" permitting and approvals for all affordable housing projects in your community?	☒ No	☐ Yes
17. Has your jurisdiction established time limits for government review and approval or disapproval of development permits in which failure to act, after the application is deemed complete, by the government within the designated time period, results in automatic approval?	☒ No	☐ Yes
18. Does your jurisdiction allow "accessory apartments" either as: a) a special exception or conditional use in all single-family residential zones or, b) "as of right" in a majority of residential districts otherwise zoned for single-family housing?	☒ No	☐ Yes
19. Does your jurisdiction have an explicit policy that adjusts or waives existing parking requirements for all affordable housing developments?	☒ No	☐ Yes
20. Does your jurisdiction require affordable housing projects to undergo public review or special hearings when the project is otherwise in full compliance with the zoning ordinance and other development regulations?	☐ Yes	☒ No
Total Points:	10	10

The questions above indicate that the city has reviewed policies and procedures and removed potential barriers when possible. The only barriers in the city that remain on the form above are due to their significant legal or financial costs.

2.

The City of Surprise has an active strategy to promote homeownership and the preservation and management of existing residential property. To offset the increasing cost of housing in the private market, the city has undertaken a number of strategies to preserve and develop new affordable housing. These strategies include:

1. The use of general funds and HOME funds for the preservation of existing affordable owner-occupied housing.
2. Support of for-profit and nonprofit developers in the construction of Tax Credit assisted rental housing for families and seniors.
3. Development of Original Townsite Revitalization Plan which has already resulted in public investment in community facilities and infill construction of mixed income owner-occupied homes.

HOMELESS

Homeless Needs (91.205 (b) and 91.215 (c))

*Please also refer to the Homeless Needs Table in the Needs.xls workbook

Homeless Needs— The jurisdiction must provide a concise summary of the nature and extent of homelessness in the jurisdiction, (including rural homelessness and chronic homelessness where applicable), addressing separately the need for facilities and services for homeless persons and homeless families with children, both sheltered and unsheltered, and homeless subpopulations, in accordance with Table 1A. The summary must include the characteristics and needs of low-income individuals and children, (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered. In addition, to the extent information is available, the plan must include a description of the nature and extent of homelessness by racial and ethnic group. A quantitative analysis is not required. If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates.

5 Year Strategic Plan Homeless Needs response:

City of Surprise' homeless needs and activities are planned and reported through the Maricopa Consortium Plan. See the 2015-2019 Consolidated Plan for the Maricopa HOME Consortium for a complete description of these activities. Additional information is provided below.

The Maricopa Association of Governments Continuum of Care Subcommittee (MAG CoC) is the regional body that manages the collaborative efforts of communities and agencies in Maricopa County to plan for the needs of the homeless and access federal funding on behalf of agencies organized to address those needs. According to the '*Regional Plan to End Homelessness*' published by MAG CoC in March 2009, there are no homeless persons in the city (*Table 7*). However, the city did a Point in Time Homeless Street Count in January 2018 in conjunction with MAG and interviewed 39 homeless persons. The city will continue to do a periodic assessment of any new homeless person cases in the city and will act accordingly to mitigate the problems.

Table 7: Homeless Street Count

2011 Homeless Street Count Municipal Summary Data

*All counts were conducted on Tuesday, January 25, 2011.



Continuum of Care
Regional Committee
on Homelessness

	Non-Chronically Homeless Male	Non-Chronically Homeless Female	Non-Chronically Homeless Male/Veteran	Non-Chronically Homeless Female/Veteran	Chronically Homeless Male	Chronically Homeless Female	Chronically Homeless Male/Veteran	Chronically Homeless Female/Veteran	Persons in Families Adult Women**	Persons in Families Adult Men	Families Adult Male/Veteran	Families Adult Female/Veteran	Persons in Families Children	Male Youth On Own	Female Youth On Own	2011 Municipal Total	2010 Municipal Total	Percent Change, NC=No Change
MAG Region Totals																		
Avondale	0	0	0	0	7	3	1	0	0	0	0	0	0	0	0	11	20	-45%
Buckeye	11	3	1	0	1	1	2	0	0	0	0	0	0	0	0	19	15	27%
Carefree	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NC
Cave Creek	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	200%
Chandler	14	1	0	0	42	5	1	0	1	0	0	0	1	0	0	65	12	442%
El Mirage	0	1	0	0	1	0	0	0	0	0	0	0	0	0	0	2	3	-33%
Fountain Hills	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NC
Gila Bend	2	1	0	0	8	1	1	1	0	0	0	0	0	0	0	14	12	17%
Gilbert	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	-100%
Glendale	9	5	1	0	16	6	5	0	0	0	0	0	0	0	0	42	28	50%
Goodyear	0	0	3	1	0	0	0	0	0	0	0	0	0	0	0	4	17	-76%
Guadalupe	52	1	0	0	5	0	0	0	0	0	0	0	0	0	0	58	80	-28%
Litchfield Park	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NC
Mesa	9	2	1	0	60	18	12	0	0	0	0	0	0	0	0	102	461	-78%
Paradise Valley	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NC
Peoria	4	0	2	0	7	0	5	0	0	0	0	0	0	0	0	18	20	-10%
Phoenix	424	118	83	22	302	60	58	24	1	3	0	0	2	42	20	1159	1750	-34%
Queen Creek	11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	11	8	38%
Scottsdale	57	7	1	0	38	12	3	0	0	0	0	0	0	1	0	119	126	-6%
Sun City	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NC
Surprise	4	0	2	0	5	0	0	0	0	0	0	0	0	0	0	11	18	-39%
Tempe	23	9	2	0	50	13	15	0	0	0	0	0	0	0	0	112	155	-28%
Tolleson	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	-100%
Wickenburg	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NC
Youngtown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NC
Municipal Total	622	148	96	23	542	119	103	25	2	3	0	0	3	43	20	1749	2729	-36%

Priority Homeless Needs

- Using the results of the Continuum of Care planning process, identify the jurisdiction's homeless and homeless prevention priorities specified in Table 1A, the Homeless and Special Needs Populations Chart. The description of the jurisdiction's choice of priority needs and allocation priorities must be based on reliable data meeting HUD standards and should reflect the required consultation with homeless assistance providers, homeless persons, and other concerned citizens regarding the needs of homeless families with children and individuals. The jurisdiction must provide an analysis of how the needs of each category of residents provided the basis for determining the relative priority of each priority homeless need category. A separate brief narrative should be directed to addressing gaps in services and housing for the sheltered and unsheltered chronic homeless.
- A community should give a high priority to chronically homeless persons, where the jurisdiction identifies sheltered and unsheltered chronic homeless persons in its Homeless Needs Table - Homeless Populations and Subpopulations.

5 Year Strategic Plan Priority Homeless Needs response:

Priority Homeless Needs

The needs chart below is developed directly from the '*Regional Plan to End Homelessness*' published by MAG CoC in March 2009.

Table 8 Part 1: Homeless Population		Sheltered		Un-sheltered	Total
		Emergency	Transitional		
1. Homeless Individuals		0	0	0	0
2. Homeless Families with Children		0	0	0	0
2a. Persons in Homeless with Children Families		0	0	0	0
Total (lines 1 + 2a)		0	0	0	0
Part 2: Homeless Subpopulations		Sheltered		Un-sheltered	Total
1. Chronically Homeless		0	0	0	0
2. Severely Mentally Ill		0			
3. Chronic Substance Abuse		0			
4. Veterans		0			
5. Persons with HIV/AIDS					
6. Victims of Domestic Violence		0			
7. Youth (Under 18 years of age)					

Source: "*Regional Plan to End Homelessness*", MAG CoC, March 2009.

The definitions used for emergency and transitional housing:

Emergency Shelter means any facility with the primary purpose of providing temporary housing for homeless people.

Transitional Housing means any facility that has the goal of facilitating the movement of homeless people to permanent housing within 24 months.

Homeless Inventory (91.210 (c))

The jurisdiction shall provide a concise summary of the existing facilities and services (including a brief inventory) that assist homeless persons and families with children and subpopulations identified in Table 1A. These include outreach and assessment, emergency shelters and services, transitional housing, permanent supportive housing, access to permanent housing, and activities to prevent low-income individuals and families with children (especially extremely low-income) from becoming homeless. The jurisdiction can use the optional Continuum of Care Housing Activity Chart and Service Activity Chart to meet this requirement.

5 Year Strategic Plan Homeless Inventory response:

The Table below documents the inventory of beds in the County from the Update to the MAG Continuum of Care Plan to End Homelessness and the inventory of beds in Surprise from local records.

Table 8 Inventory/Beds	Shelter	Transitional	Permanent Supportive
Maricopa County			
Total	2694	2999	2523
Surprise			
Eve's Place	10 beds		
Catholic Charities		3 units	
Central AZ Shelter Services	1260 nights		
Surprise Total	10 beds	3 units	50 units

Homeless Strategic Plan (91.215 (c))

1. Homelessness— Describe the jurisdiction's strategy for developing a system to address homelessness and the priority needs of homeless persons and families (including the subpopulations identified in the needs section). The jurisdiction's strategy must consider the housing and supportive services needed in each stage of the process which includes preventing homelessness, outreach/assessment, emergency shelters and services, transitional housing, and helping homeless persons (especially any persons that are chronically homeless) make the transition to permanent housing and independent living. The jurisdiction must also describe its strategy for helping extremely low- and low-income individuals and families who are at imminent risk of becoming homeless.
2. Chronic homelessness—Describe the jurisdiction's strategy for eliminating chronic homelessness by 2019. This should include the strategy for helping homeless persons make the transition to permanent housing and independent living. This strategy should, to the maximum extent feasible, be coordinated with the strategy presented Exhibit 1 of the Continuum of Care (CoC) application and any other strategy or plan to eliminate chronic homelessness. Also describe, in a narrative, relationships and efforts to coordinate the Conplan, CoC, and any other strategy or plan to address chronic homelessness.
3. Homelessness Prevention—Describe the jurisdiction's strategy to help prevent homelessness for individuals and families with children who are at imminent risk of becoming homeless.
4. Institutional Structure—Briefly describe the institutional structure, including private industry, nonprofit organizations, and public institutions, through which the jurisdiction will carry out its homelessness strategy.
5. Discharge Coordination Policy—Every jurisdiction receiving McKinney-Vento Homeless Assistance Act Emergency Shelter Grant (ESG), Supportive Housing, Shelter Plus Care, or Section 8 SRO Program funds must develop and implement a Discharge Coordination Policy, to the maximum extent practicable. Such a policy should include "policies and protocols for the discharge of persons from publicly funded institutions or systems of care (such as health care facilities, foster care or other youth facilities, or correction programs and institutions) in order to prevent such discharge from immediately resulting in homelessness for such persons." The jurisdiction should describe its planned activities to implement a cohesive, community-wide Discharge Coordination Policy, and how

the community will move toward such a policy.

5 Year Homeless Strategic Plan response:

Since no homeless persons are reported from the above Table1A, but 2 persons were identified. The city will continue to do a periodic assessment of any new homeless person cases in the city and will act accordingly to mitigate the problem.

Emergency Shelter Grants (ESG)

(States only) Describe the process for awarding grants to State recipients, and a description of how the allocation will be made available to units of local government.

5 Year Strategic Plan ESG response:

This section is not applicable to this plan. Surprise does not receive Emergency Shelter Grant funding.

COMMUNITY DEVELOPMENT

Community Development (91.215 (e))

*Please also refer to the Community Development Table in the Needs.xls workbook

1. Identify the jurisdiction's priority non-housing community development needs eligible for assistance by CDBG eligibility category specified in the Community Development Needs Table (formerly Table 2B), – i.e., public facilities, public improvements, public services and economic development.
2. Describe the basis for assigning the priority given to each category of priority needs.
3. Identify any obstacles to meeting underserved needs.
4. Identify specific long-term and short-term community development objectives (including economic development activities that create jobs), developed in accordance with the statutory goals described in section 24 CFR 91.1 and the primary objective of the CDBG program to provide decent housing and a suitable living environment and expand economic opportunities, principally for low- and moderate-income persons.

NOTE: Each specific objective developed to address a priority need, must be identified by number and contain proposed accomplishments, the time period (i.e., one, two, three, or more years), and annual program year numeric goals the jurisdiction hopes to achieve in quantitative terms, or in other measurable terms as identified and defined by the jurisdiction.

5 Year Strategic Plan Community Development response:

1.

Based on feedback from citizens, city staff, CDBG and Planning and Zoning Commission members, five priority needs have been identified for implementation under the CDBG funding that will benefit low- to moderate-income persons in the City of Surprise. They are:

- a) Youth, Senior and Veteran Programs.
- b) Job training programs for residents in Surprise with focus on the OTS.
- c) Water system improvements in the OTS.
- d) Lighting improvements in the OTS.
- e) City wide housing rehabilitation.
- f) Public Service Activities through nonprofit agency(s). Fifteen percent of the allotted PY 2015 funding will be delineated for this activity.

These projects are designated high priority in the following table. For the first time, the city will aim funds at public services and consider economic development activities per the public response that the city received from the survey as part of public participation process. Fifteen percentage of the allotted CDBG funding will be set aside for public service activities. The CDBG funds will be targeted to the Original Townsite Area under the area benefit caveat as this is the only place in the city with a census tract where majority of the population is either low or moderate income.

City of Surprise will transfer Program Income in the amount of \$1,130,633 from the Neighborhood Stabilization Program (NSP) into the CDBG program for the Annual Action Plan 3 2017-18. This transfer of funds constitutes a Consolidated Plan Amendment. The funding breakdown is listed below in Table 9.

Table 9:

Program year	Projects	Public Services (15% max.)	Administrative functions (20% max.)	Carried Over CDBG Funds	Total
2015-16	\$551,309	\$82,696	\$110,261	\$551,177	\$1,102,486
2016-17	\$358,352	\$82,696	\$110,261	-	\$551,309
2017-18	\$415,064	\$95,784	\$127,712	-	\$638,560
2017-18 Transfer	\$1,017,570	\$N/A	\$113,063	-	\$1,130,633
2018-19	\$415,064	\$95,784	\$127,712	-	\$638,560
2019-20	\$415,064	\$95,784	\$127,712	-	\$638,560

Below is the community development needs table based on funding projections and prioritized needs for the next five years:

Table 10: Community Development Needs		Needs	Priorit y Need: H, M, L	Dollars to Address- Specifically planned for this Strategic Plan	Plan to Fund? Y/N	Fund Source	Objective	Outcome
Public Fac/Improvements	03 Public Facilities and Improvements (General) 570.2011	Yes – 5 Years	H	\$1,017,570	Y	CDBG	Suitable Living Environment	Sustain-ability
	03F Parks, Recreational Facilities 570.2011	Yes	L		N	CDBG	Suitable Living Environment	Sustain-ability
	03J Water/Sewer Improvements 570.2011	Yes	H	1,369,000	Y	CDBG	Suitable Living Environment	Sustain-ability
	03K Street Improvements 570.2011	Yes- Jerry Street Year 1 and 2	H	\$141,250	Y	CDBG/other	Suitable Living Environment /Economic Dev.	Sustain-ability
	03I Flood Drain Improvements 570.2011	Yes 3 locations	H	\$100,000	Y	CDBG	Suitable Living Environment	Sustain-ability
	03O Fire Stations/Equipment 570.2011	No	L		Y	General	Suitable Living Environment	Sustain-ability
	03A Senior Centers 570.2011	Yes	H	\$50,000	Y	General	Suitable Living Environment	Sustain-ability
	03B Handicapped Centers 570.2011	Yes	L	\$10,000	N	CDBG/other	Suitable Living Environment	Sustain-ability
	03C Homeless Facilities 570.2011	Yes	H	\$10,000	Y	CDBG	Suitable Living Environment	Sustain-ability
	03D Youth Centers 570.2011	Yes	H	\$26,000	Y	CDBG	Suitable Living Environment	Sustain-ability
	03P Health Facilities 570.2011	Yes	H		N	Unknown	Suitable Living Environment	Sustain-ability
	05 Public Services (General) 570.201(e)	Yes; 5 Years	H	\$419,331	Y	CDBG	Suitable Living Environment	Sustain-ability
	05A Senior Services 570.201(e)	Yes	H		Y	CDBG	Suitable Living Environment	Sustain-ability
Public Services	05B Handicapped Services 570.201(e)	Yes	H		Y	General	Suitable Living Environment	Sustain-ability
	05D Youth Services 570.201(e)	Yes; Year1-5	H	\$270,498	Y	CDBG/other	Suitable Living Environment /Economic Dev.	Sustain-ability
	05E Transportation Services 570.201(e)	Yes	H		Y	General	Suitable Living Environment	Sustain-ability

05G Battered and Abused Spouses 570.201(e)	Yes	H		Y	CDBG	Suitable Living Environment	Sustainability
05H Employment Training 570.201(e)	Yes	H		Y	CDBG	Suitable Living Environment	Sustainability
05J Fair Housing Activities (if CDBG, then subject to 570.201(e))	Yes	H	\$15,000	Y	CDBG	Suitable Living Environment	Sustainability
05M Health Services 570.201(e)	Yes	H		Y	Other	Suitable Living Environment	Sustainability
05N Abused and Neglected Children 570.201(e)	Yes	H		Y	CDBG	Suitable Living Environment	Sustainability
05P Screening for Lead-Based Paint/Lead Hazards Poison 570.201(e)	Yes	M		Y	CDBG/HOME	Suitable Living Environment	Sustainability
05Q Subsidence Payments 570.204 (Temporary)	Yes	H			General	Suitable Living Environment	Sustainability
05S Rental Housing Subsidies (if HOME, not part of 5% 570.204)	Yes	H		N	Section 8 Vouchers	Suitable Living Environment	Sustainability
05T Security Deposits (if HOME, not part of 5% Admin c	Yes	H		Y	Private	Suitable Living Environment	Sustainability
13 Direct Homeownership Assistance 570.201(n)	Yes	H		Y	HOME/NSP	Decent Housing	Affordability
14A Rehab; Single-Unit Residential 570.202	Yes; 25 homes; Year 1-5	H	\$667,250	Y	CDBG/HOME /other	Decent Housing	Affordability
14B Rehab; Multi-Unit Residential 570.202	Yes	H		Y	HOME	Decent Housing	Affordability
14G Acquisition – for Rehabilitation 570.202	Yes	H		Y	HOME	Decent Housing	Affordability
14H Rehabilitation Administration 570.202	Yes	H		Y	CDBG	Decent Housing	Affordability
14I Lead-Based/Lead Hazard Test/Abate 570.202	Yes	H		Y	CDBG/HOME	Decent Housing	Affordability
17A CI Land Acquisition/Disposition 570.203(a)	Yes	H		Y	CDBG	Decent Housing	Affordability
19A HOME Admin/Planning Costs of PJ (not part of 5% Ad	Yes	H		Y	HOME		
19B HOME CHDO Operating Costs (not part of 5% Admin ca	Yes	H		Y	HOME		
20 Planning 570.205	Yes	Yes		Y	CDBG		
21A General Program Administration 570.206	Yes; 5 years	H	\$519,936	Y	CDBG/HOME		
21D Fair Housing Activities (subject to 20% Admin cap) 570.206	Yes	H		Y	CDBG	Suitable Living Environment	Sustainability
21I HOME CHDO Operating Expenses (subject to 5% cap)	0	M		Y	HOME		
22 Unprogrammed Funds	0				CDBG		

All of the stated priorities and needs are subject to amendment and change due to:

- **Changes in regulatory requirements at the local, state, and federal level that impact the priorities, funding, and delivery of services;**
- **Changing demographics and socio-economic factors affecting the city;**
- **Annual reevaluations of resources, priorities, objectives, strategies and goals for the city; and**
- **Changes in the funding resources and amounts available for programs and services for city residents.**

2.

Priority needs for CDBG eligible activities have been assessed using the following resources:

- **Citizens and city staff input through surveys, interviews AND Public Hearings;**
- **The City of Surprise Capital Improvement Plan;**
- **The City of Surprise General Plan;**
- **Activity and project needs assessments; and**
- **Planning and Zoning Commission**
- **Local information from the Maricopa HOME Consortium and MAG CoC.**

The primary objective of the City of Surprise CDBG program is to foster the development, revitalization, and preservation of neighborhoods to provide decent housing, a suitable living environment, and expanded economic opportunities, especially for low- and moderate-income persons in the OTS area of Surprise.

3.

Funding Future

One of the main obstacles to meeting community needs is inadequate resources for programs. The decline in resources across sectors, including government agencies and foundations, due to the economic downturn has negatively impacted the quantity and quality of housing and community development services. Although federal stimulus funding helps mitigate this trend to some extent, resources for these programs will likely be limited for the near future.

Other obstacles to meeting underserved include:

- a) **Insufficient resources to meet all of the legitimate and eligible needs identified.**
- b) **Private ownership of incompatible land uses within the revitalization area.**
- c) **Public ownership of the water system in the revitalization area by another municipality.**
- d) **Environmental issues related to the location of Grand Avenue, the railroad, and Luke Airforce Base.**

Antipoverty Strategy (91.215 (h))

1. **Describe the jurisdiction's goals, programs, and policies for reducing the number of poverty level families (as defined by the Office of Management and Budget and revised annually). In consultation with other appropriate public and private agencies, (i.e. TANF agency) state how the jurisdiction's goals, programs, and policies for producing and preserving affordable housing set forth in the housing**

component of the consolidated plan will be coordinated with other programs and services for which the jurisdiction is responsible.

2. Identify the extent to which this strategy will reduce (or assist in reducing) the number of poverty level families, taking into consideration factors over which the jurisdiction has control.

5 Year Strategic Plan Antipoverty Strategy response:

1.

The City of Surprise Anti-Poverty Strategy is to help people to move out of poverty through emergency stabilization actions with local non-profits and Community Housing Development Corporations that include:

- **Intake and case management.**
- **Utility assistance.**
- **Emergency mortgage/rent assistance.**

The long-term actions include:

- **Operation and capital costs for organizations that provide job training, self sufficiency, and other counseling and planning services for homeless or at-risk persons. CDBG public service funding would be targeted for this action.**
- **After school and other youth programs that help at-risk youth that provide positive role models and promote healthy lifestyles.**
- **Information and referral services on job training, small business, and similar programs.**
- **Counseling and downpayment assistance for low- and moderate-income first-time homebuyers.**
- **Limited emergency assistance for low- and moderate-income persons at risk of becoming homeless to help them maintain their current housing and not become dependent on more costly outside services.**

These programs are provided locally and regionally. They all support the broad goal of helping prevent or end homelessness by promoting self-sufficiency. CDBG and HOME funds will be available to fund these activities.

2.

A number of residents will experience improved economic conditions over the next five years but the number of households that will move out of poverty is expected to be relatively small.

Low Income Housing Tax Credit (LIHTC) Coordination (91.315 (k))

1. (States only) Describe the strategy to coordinate the Low-income Housing Tax Credit (LIHTC) with the development of housing that is affordable to low- and moderate-income families.

5 Year Strategic Plan LIHTC Coordination response:

Not Applicable.

NON-HOMELESS SPECIAL NEEDS

Specific Special Needs Objectives (91.215)

1. Describe the priorities and specific objectives the jurisdiction hopes to achieve over a specified time period.
2. Describe how Federal, State, and local public and private sector resources that are reasonably expected to be available will be used to address identified needs for the period covered by the strategic plan.

5 Year Non-homeless Special Needs Analysis response:

1.
The City of Surprise has included public service activities through CDBG funding to benefit low- and moderate-income residents in the city. The top priorities for the next five years as per the survey feedback are:

- **Neighborhood improvement services**
- **Youth activities**
- **Senior activities**
- **Veteran services**
- **Job training activities**
- **Affordable Housing**

For the program year 2015-16, the city will be targeting the delineated CDBG public service funds for emergency food boxes, services for youth, seniors, homeless individuals and families and veterans through nonprofit organizations.

2.
Due to the economic downturn, no city general revenue will be allotted to these services at this time. Other funding from state and federal sources will be requested as feasible.

Non-homeless Special Needs (91.205 (d) and 91.210 (d)) Analysis (including HOPWA)

*Please also refer to the Non-homeless Special Needs Table in the Needs.xls workbook.

1. Estimate, to the extent practicable, the number of persons in various subpopulations that are not homeless but may require housing or supportive services, including the elderly, frail elderly, persons with disabilities (mental, physical, developmental, persons with HIV/AIDS and their families), persons with alcohol or other drug addiction, victims of domestic violence, and any other categories the jurisdiction may specify and describe their supportive housing needs. The jurisdiction can use the Non-Homeless Special Needs Table (formerly Table 1B) of their Consolidated Plan to help identify these needs.

*Note: HOPWA recipients must identify the size and characteristics of the population with HIV/AIDS and their families that will be served in the metropolitan area.

2. Identify the priority housing and supportive service needs of persons who are not homeless but may or may not require supportive housing, i.e., elderly, frail elderly, persons with disabilities (mental, physical, developmental, persons with HIV/AIDS and their families), persons with alcohol or other drug addiction by using the Non-homeless Special Needs Table.
3. Describe the basis for assigning the priority given to each category of priority needs.
4. Identify any obstacles to meeting underserved needs.
5. To the extent information is available, describe the facilities and services that assist persons who are not homeless but require supportive housing, and programs for ensuring that persons returning from mental and physical health institutions receive appropriate supportive housing.
6. If the jurisdiction plans to use HOME or other tenant based rental assistance to assist one or more of these subpopulations, it must justify the need for such assistance in the plan.

5 Year Non-homeless Special Needs Analysis response:

The estimate of need in the following chart is based on national population studies and is taken from the Maricopa HOME Consortium Strategic Plan. The estimated number of people in Surprise for each need category is determined by multiplying the category's county population by the percentage of Surprise population that is in the Maricopa County- 3%.

Table 11:

Special needs populations identified here are ranked as high priority for Consolidated Planning Purposes but may not necessarily be funded through CDBG/HOME	Population count for Maricopa County	Data Sources	Population count proportional to the City of Surprise-3%	Types of supportive services needed by this population	Identified funding gap in services	Identified sources of service for this population
Elderly	537,261	2010 Census	16,117	Case management, Befriending services, Counseling, Adult day care, Home Care Home delivered meals	Area Agency on Aging Study in 2013 indicated current funding serves about one third of need.	Area Agency on Aging, Maricopa County Special Transportation Services, AHCCCS, Community Action Program
Frail elderly	91,937	<i>Area of Agency on Aging 2013</i>	2758	Case management, Befriending services, Counselling, Adult day care, Home care, Home delivered meals, Help service, Nursing/ medical services	Area Agency on Aging Study in 2013 indicated current funding serves about one third of need.	Area Agency on Aging, Senior Adult Independent Living (SAIL), Arizona Long Term Care System, AHCCCS
Persons with severe mental illness	134,315	<i>Mental Health: Heath Service Executive</i>	4029	Outreach and identification, Treatment, Health care, Income support, Rehabilitation services		AHCCCS
Developmentally disabled persons	80,188	<i>Bethesda Institute 2006</i>	723	Assistive technology, Employment and training, Information and referral, Transportation, Caregiver respite	Area Agency on Aging Study in 2013 indicated current funding serves about one third of need.	The Centers for Habilitation, Arizona Bridge to Independent Living, Maricopa County Special Transportation Services, AHCCCS

Special needs populations identified here are ranked as high priority for Consolidated Planning Purposes but may not necessarily be funded through CDBG/HOME	Population count for Maricopa County	Data Sources	Population count proportional to the City of Surprise-3%	Types of supportive services needed by this population	Identified funding gap in services	Identified sources of service for this population
Physically disabled persons	469,101	Disabilitystatistics.org 2012	14,073	Assistive technology, Employment and training, Information and referral, Transportation, Caregiver respite	Area Agency on Aging Study in 2013 indicated current funding serves about one third of need.	Arizona Technology Access Program, Easter Seals, Southwest Human Development, Arizona Center for the Blind and Visually Impaired, Valley Center for the Deaf, Arizona Commission for the Deaf and Hard of Hearing, Arizona Bridge to Independent Living, Maricopa County Special Transportation Services, AHCCCS
Alcohol/drug addicted persons	400,941	Closing the Addiction Treatment Gap (CATG) 2010	12,028	Monitoring, Screening, Information and referral, Detox medication, Education, Self-help groups		CDBG, AHCCCS

Special needs populations identified here are ranked as high priority for Consolidated Planning Purposes but may not necessarily be funded through CDBG/HOME	Population count for Maricopa County	Data Sources	Population count proportional to the City of Surprise-3%	Types of supportive services needed by this population	Identified funding gap in services	Identified sources of service for this population
Persons with HIV/AIDS and their families	10200	Arizona Dept. of Health Services 2012 Annual Report	306	Case management, Emergency financial assistance, Food, Transportation, Early intervention, Education, Wellness and nutrition		CDBG, Maricopa County Health Department, Ryan White, AHCCCS

Housing Opportunities for People with AIDS (HOPWA)

*Please also refer to the HOPWA Table in the Needs.xls workbook.

1. The Plan includes a description of the activities to be undertaken with its HOPWA Program funds to address priority unmet housing needs for the eligible population. Activities will assist persons who are not homeless but require supportive housing, such as efforts to prevent low-income individuals and families from becoming homeless and may address the housing needs of persons who are homeless in order to help homeless persons make the transition to permanent housing and independent living. The plan would identify any obstacles to meeting underserved needs and summarize the priorities and specific objectives, describing how funds made available will be used to address identified needs.
2. The Plan must establish annual HOPWA output goals for the planned number of households to be assisted during the year in: (1) short-term rent, mortgage and utility payments to avoid homelessness; (2) rental assistance programs; and (3) in housing facilities, such as community residences and SRO dwellings, where funds are used to develop and/or operate these facilities. The plan can also describe the special features or needs being addressed, such as support for persons who are homeless or chronically homeless. These outputs are to be used in connection with an assessment of client outcomes for achieving housing stability, reduced risks of homelessness and improved access to care.
3. For housing facility projects being developed, a target date for the completion of each development activity must be included and information on the continued use of these units for the eligible population based on their stewardship requirements (e.g. within the ten-year use periods for projects involving acquisition, new construction or substantial rehabilitation).

4. The Plan includes an explanation of how the funds will be allocated including a description of the geographic area in which assistance will be directed and the rationale for these geographic allocations and priorities. Include the name of each project sponsor, the zip code for the primary area(s) of planned activities, amounts committed to that sponsor, and whether the sponsor is a faith-based and/or grassroots organization.
5. The Plan describes the role of the lead jurisdiction in the eligible metropolitan statistical area (EMSA), involving (a) consultation to develop a metropolitan-wide strategy for addressing the needs of persons with HIV/AIDS and their families living throughout the EMSA with the other jurisdictions within the EMSA; (b) the standards and procedures to be used to monitor HOPWA Program activities in order to ensure compliance by project sponsors of the requirements of the program.
6. The Plan includes the certifications relevant to the HOPWA Program.

5 Year Strategic Plan HOPWA response:

This section is not applicable to this plan. Surprise does not receive HOPWA funding.

Specific HOPWA Objectives

1. Describe how Federal, State, and local public and private sector resources that are reasonably expected to be available will be used to address identified needs for the period covered by the strategic plan.

5 Year Specific HOPWA Objectives response:

This section is not applicable to this plan. Surprise does not receive HOPWA funding.

OTHER NARRATIVE

Include any Strategic Plan information that was not covered by a narrative in any other section.

Fair Housing Policies

The City of Surprise continues to be committed to fair housing and to eliminate discrimination in the city. The city completed an Analysis of Impediments to Fair Housing Choice in 2012. Major points from the plan include:

Table 12: Fair Housing Plan 2012-17

IMPEDIMENT TO BE ADDRESSED	GOAL	STRATEGY TO MEET THE GOAL	RESPONSIBLE ENTITIES ASSIGNED TO MEET GOALS	PROPOSED INVESTMENT	PERFORMANCE MEASURE
Lack of diversity in many Census Tracts	Opportunities for diverse populations to choose	Continue to engage the real estate community in	Fair Housing Coordinator, 2015	Staff time	Number of meetings initiated

IMPEDIMENT TO BE ADDRESSED	GOAL	STRATEGY TO MEET THE GOAL	RESPONSIBLE ENTITIES ASSIGNED TO MEET GOALS	PROPOSED INVESTMENT	PERFORMANCE MEASURE
	places to live throughout the community	increasing opportunities for greater diversity in neighborhoods. Become a participant in the Arizona Fair Housing Partnership.	Fair Housing Coordinator, 2015		Number of meetings attended
High denial rates for Black/African Americans in CT 405.11	Equal access to credit and mortgages throughout the community	Engage the services of one of the fair housing services to provide paired test to assess whether minorities are treated with different terms and conditions.	Neighborhood Services, within the next five years.	\$5,000	Number of tests performed
Lack of affordable rental housing has a disproportionate impact on single female heads of households with children.	Opportunities for parents who become single to find places to live in the community.	Develop an IGA with the Housing Authority of Maricopa County to formalize the operating relationship with the agency. Seek additional resources to facilitate development of affordable rental housing.	Neighborhood Services Department, within the next 24 months. Neighborhood Services	Staff time Indirect, in that funding would actually come from other sources.	IGA executed Additional affordable units constructed for families.
Lack of knowledge about fair housing rights and how to file a fair housing complaint.	An increase in people's knowledge of fair housing rights.	Facilitate and/or participate in fair housing training for City staff, real estate professionals and citizens.	Fair Housing Coordinator	Staff time and incidental costs related to speakers and sessions.	Sessions provided
Lack of fair housing infrastructure required as part of the CDBG Certification to Affirmatively Further Fair Housing.	Compliance with the CDBG Certification to Affirmatively Further Fair Housing	Modify the Fair Housing page on the City website to access directly HUD and the Attorney General's fair housing web sites. Develop a data	Neighborhood Services and the City's web manager Fair Housing Coordinator and	Staff time	New information available A new useable database

IMPEDIMENT TO BE ADDRESSED	GOAL	STRATEGY TO MEET THE GOAL	RESPONSIBLE ENTITIES ASSIGNED TO MEET GOALS	PROPOSED INVESTMENT	PERFORMANCE MEASURE
		base that can be used by both the Fair Housing Coordinator and the ADA Coordinator to record, identify and track resolution when fair housing complaints and inquiries come to the City. Develop a grievance procedure for Section 504 complaints. Such a procedure may also be used for other types of complaints related to federal grants administration. Update the AI periodically as new information is available from the Census or other sources which makes an update appropriate.	ADA Coordinator. Fair Housing Coordinator and City Attorney Neighborhood Services		A formal administrative grievance procedure Periodic updates to the AI

Area of Minority Concentration

Surprise has one area of minority concentration. The Hispanic population makes up 18.5% of Census Tract 608 and totals 22,856 residents as per census 2010. This census tract includes all the Original Townsite and is the only low- and moderate-income census tract in the community. All area benefit activities included in the 5 Year Strategic Plan will take place in this area. The city has a Council appointed, the Planning and Zoning Commission, which monitor the implementation of the Specific Plan for the Revitalization of the Original Townsite. Resources recommended by these boards include CDBG funds and general funds set aside for the revitalization of the OTS. In addition, many direct benefit recipients of housing rehabilitation assistance are residents of this neighborhood. The commitment of facilities and resources to this neighborhood is substantial.

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: CDBG Consolidated Plan 2015-19 Amemdment

OVERALL PUBLIC INVOLVEMENT LEVEL:

Public Hearing on 3/1/18 (P & Z Meeting) and 3/20/18 Council Meeting. 30 day Public comment period (3/5- 4/5/18) for draft Consolidated Plan Amendment

IDENTIFY STAKEHOLDERS:

OTS residents/property owners, public service nonprofits, City of Surprise staff;Public Works, Community Development, Economic Development and Human Services.

OBJECTIVES:

Create viable neighborhoods, provide decent, safe and affordable housing; Low to moderate income resident job creation; provide services to those with special needs

PUBLIC ENGAGEMENT STRATEGIES & TOOLS:

Public Engagement & Project timeline:

Public outreach time frame (when to when) Public Hearings 3/1; 3/20 & 3/5-4/5/18 30 day pub.comm
Future Council Work Session/Meetings target dates 3/20/18
Election dates (if applicable)
Project start/completion dates 11/2018

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



Third Year Annual Action Plan 2017-2018 Consolidated Plan 2015-2019 Amendments

Human Service & Community Vitality | March 1, 2018



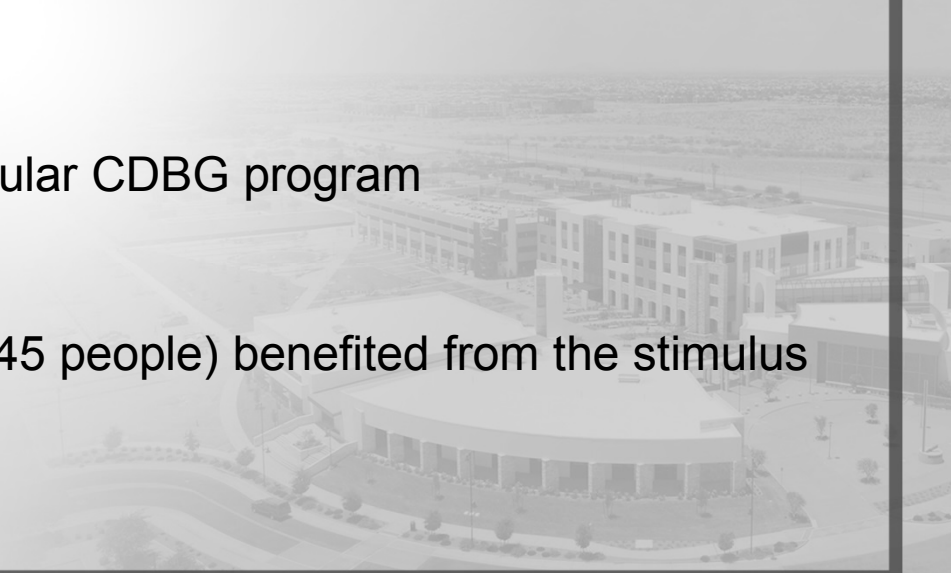
Today's Objectives

- Background
 - Process Timeline
 - Annual Action Plan/Con Plan Amendment
- 



NSP Background

Neighborhood Stabilization Program – Federal stimulus dollars to purchase foreclosed homes within target areas

- Program has been sunset
 - Generated Program Income (PI)
 - Able to reprogram PI dollars into regular CDBG program
 - Annual Action Plan Amendment
 - Overall, 104 Surprise households (245 people) benefited from the stimulus funds. 19 homes were purchased
- 



NSP Background

HUD request to transfer NSP1 and NSP3
Program Income into regular CDBG program
through plan amendment

Year to Date Program Income Remaining-
\$1,130,633 for 2017-2018



AAP BENEFICIARY REQUIREMENTS

National Objectives Surprise Will Meet

- Benefit Low To Moderate Income Persons
- Area Benefit
- Limited Clientele



FUNDING BENEFICIARIES

- **Area Benefit**
 - 51% Residents in the area must be Low/Mod Income
 - Activities Targeted only for Surprise Heritage District

Limited Clientele

- Youth/Seniors/Homeless Persons
 - 51% Of Low/Mod Income Persons
- 



Process Timeline

March 5 2018 –

April 5 2018

Draft Plan

30 day Comment
Period

March 20, 2018

Council Public
Hearing

April 16, 2018

Submit to HUD





Annual Action Plan

COMPONENTS

Adopted
Consolidated Plan 2015-19

Strategic Plan
(5 Years)

Priorities and Needs

Annual Action Plan 3
Amendment 2017-18
(1 Year)

Specific Projects
Funding Priorities

Annual Action Plan Amendment

Annual Action Plan 2018-19 Projects

Neighborhood Improvements	\$517,570
Affordable Housing	\$500,000
Administrative Allocation	\$113,063
Total	<u>\$1,130,633</u>



Affordable Housing

- Affordable Housing needs – consistent with NSP mission
- Maricopa County Housing Authority Proposed Project
- \$30 million projected investment in OTS for project
- Three public input meetings to date to review concept, collect feedback

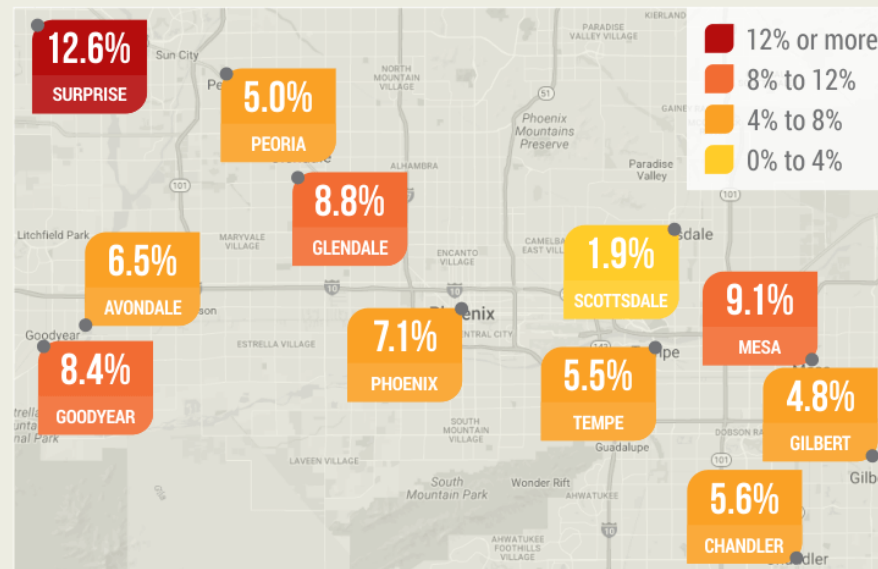




Affordable Housing

Phoenix Metro Area

How much has rent changed in your city in 2016?



Source: Yardi Matrix

RENTCafe™



Affordable Housing

- Average Rent increased 5.6% in valley from 2016 -2017
- Occupancy Rate on apartments with 10+ units is 94.9%
- Since 2010, rent in the Phoenix MSA grew 142%, compared to Tucson (87%), Las Vegas (74%), San Diego (34%)

City Analysis

City	Avg. Rent 2017	Percentage Change	Occupancy Rate
Phoenix	\$923	+5.6%	94.8%
Mesa	\$892	+5.7%	95.9%
Glendale	\$849	+5.5%	95%

Source: ABI Multifamily

Development Partners

Housing Authority of Maricopa County with Gorman & Company





Neighborhood Improvements

- Gaines Park ballfield relocation
- Right of way improvement/infrastructure





S U R P R I S E

A R I Z O N A

QUESTIONS OR COMMENTS?

Jason Hughes
Human Service & Community Vitality
Neighborhood Services Acting Supervisor

Alicia Rubio
Human Service & Community Vitality
Neighborhood Services Program
Coordinator



CITY OF SURPRISE
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

Back Print

Board Meeting Date:	March 1, 2018	Contact Person:	Alicia Rubio, Human Service & Community Vitality
Submitting Department:	CD Boards and Commissions	District:	Citywide
Staff Recommendations:	Approve		

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

Agenda Wording:

Consideration and action on an amendment to the funding priorities for the Community Development Block Grant Program Third Year Annual Action Plan for Year 2017-2018.

Motion:

I move to recommend approval to the Mayor and Council an amendment to the funding priorities for the Community Development Block Grant Program Annual Action Plan Year 2017-18.

Background:

In November 2008, the Council approved the Neighborhood Stabilization Program's (NSP) grant for federal funding to purchase foreclosed homes located in Special Planning Areas which were largely affected by foreclosure. The funds were federal stimulus dollars where there were specific requirements in order for the homes to be purchased with these funds. The homes were subsequently sold to qualified buyers per the NSP guidelines. The funds that were used to purchase the homes were then returned to the City as Program Income. In order to spend these funds, Surprise will need to amend their Annual Acton Plan for Program Year 2017-2018.

Financial Impact Statement:

Program Income received from the Neighborhood Stabilization Program equals \$1,130,633. Transferring this money to the Community Development Block Grant has no impact on the FY18 budget. There is no city match requirement.

ATTACHMENTS:

Click to download

☐ [Staff Report](#)

- ☐ [Annual Action Plan 2017-18 Amendment](#)
- ☐ [Public Engagement Form](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

Seth Dyson, Director

Alicia Rubio, Neighborhood Services Program Coordinator



HUMAN SERVICE AND COMMUNITY VITALITY

Date: March 1, 2018

To: Planning and Zoning Commission Members

From: Seth Dyson, Director
Jason Hughes, Acting Neighborhood Services Supervisor
Alicia Rubio, Neighborhood Services Coordinator

Re: CDBG- 2017-2018 Annual Action Plan Amendment Funding Priorities

Introduction

In November 2008, the Council approved the Neighborhood Stabilization Program's (NSP) grant for federal funding to purchase foreclosed homes located in Special Planning Areas which were largely affected by foreclosure. The funds were federal stimulus dollars with specific requirements in order for the homes to be purchased. The homes were subsequently sold to qualified buyers per the NSP guidelines. The funds that were used to purchase the homes were then returned to the City as Program Income upon the sale. Surprise has been authorized by Housing and Urban Development (HUD) to transfer program income to the Community Development Block Grant Program (CDBG). In order to spend these funds, Surprise will need to amend their Annual Action Plan for Program Year 2017-2018.

Today's presentation to the Planning and Zoning Commission will provide information regarding the Annual Action Plan Amendment to assist the Commission in deciding if proposed projects meet grant criteria while filling community needs. Once the recommendation is determined, it will be forwarded to Council for consideration. Upon approval by City Council, the CDBG Administration, Neighborhood Improvement and Affordable Housing Activities will be submitted to HUD as part of the Annual Action Plan Amendment 2017-18.

Background

CDBG administration and neighborhood improvements are carried out by city departments. Affordable Housing activities are carried out by outside agencies. These projects will address the neighborhood commercial demolition and affordable housing needs identified in the city's Consolidated Plan. CDBG administration, neighborhood improvements and affordable housing projects will be used to implement activities that will improve the safety and quality of life of the residents living within the Heritage District. Although the Consolidated Plan lists Neighborhood Improvements as a priority, the city wanted to specifically list Commercial Property / Building Demolition in the Surprise Heritage District as the project funding priorities considered today.

According to HUD regulations, CDBG funds may be used to provide Neighborhood Improvements (including labor, supplies, materials, project management and other costs) and Economic Development activities, provided the service will:

- Serve low to moderate income persons in the City of Surprise through area benefit or serving a particular clientele like seniors, youth and families
- Neighborhood Improvements which include infrastructure and possible commercial demolition within the Surprise Heritage District
- Affordable Housing Opportunities

Funding Limit

The amount of Program Income to be included in the Annual Action Plan Amendment 2017-2018 is \$1,130,633. CDBG Administration, infrastructure and possible commercial property / building demolition and affordable housing opportunities are activities that will be carried out as part of this plan amendment.

Updated Actions

Staff's funding recommendations are as follows:

Administration	\$113,063
-----------------------	------------------

Salaries, supplies, compliance needs

Neighborhood Improvement Projects	\$517,570
--	------------------

Gaines Park ballfield relocation and possible commercial property/building demolition within the Surprise Heritage District.

Affordable Housing Opportunities	\$500,000
---	------------------

Provide assistance for development of affordable housing units in the Heritage District.

Total CDBG Transfer Amount	<u>\$1,130,633</u>
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Future Actions

- City Council Public Hearing and action 3/20/18
- Submission to HUD as part of Annual Action Plan Amendment 2017-18 by April 16, 2018.

Recommendations

Approval of Annual Action Plan Amendment 2017-2018 administration, commercial property / building demolition and affordable housing activities within the Surprise Heritage District as funding priorities for the Community Development Block Grant Annual Action Plan for 2017-2018.

CITY OF SURPRISE, ARIZONA
Draft
ANNUAL ACTION PLAN 2017-18 AMENDMENT



Third Program Year Action Plan Amendment

This Fourth Annual Action Plan (FAAP 2018-2019) includes the [SF 424](#) and Narrative Responses to Action Plan questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations.

ON REQUEST THIS DOCUMENT CAN BE MADE AVAILABLE IN ALTERNATE FORMATS



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Executive Summary

AP-05 Executive Summary - 91.200(c), 91.220(b)

1. Introduction

The Third Year Annual Action Plan 2017-18 (AAP3 2017-18) implements the third year of activities that will address goals established in the City of Surprise Consolidated Plan 2015-19. The major focus of this AAP3 2017-18 concentrates on creating suitable living environments and providing economic development opportunities. This Program Year will be the first to implement Micro-Enterprise Grants to continue providing economic development opportunities for the residents of the Surprise Heritage District. The Third Year Annual Action Plan **Amendment 2017-18** (AAP3 2017-18) **amends** the third year of activities that will address goals established in the City of Surprise Consolidated Plan 2015-19. The AAP3 2017-18 **amendment concentrates on creating suitable living environments and providing neighborhood improvement opportunities. This Program Year amendment will include a transfer of Neighborhood Stabilization Program Income in the amount of \$ 1,130,633 to be allocated to eligible CDBG projects. The Third Year AAP 2017-2018 amendment complies with regulations set by the U.S. Department of Housing and Urban Development (HUD).** HUD requires entitlement communities, such as the City of Surprise, to consolidate its planning, application and reporting requirements for HUD programs, including the Community Development Block Grant (CDBG) and the HOME Investment Partnership Grant programs. An Annual Action Plan is prepared each year and is presented to the City of Surprise Planning and Zoning Commission and the City Council. **Therefore, any plan amendments shall go before the commission for approval.**

The needs of low-income seniors, low-income youth, people in poverty and the community's aging neighborhoods and public infrastructure continue. The Third Year AAP 2017-18 will focus on the allocation of CDBG and HOME funds for these services including economic development opportunities in order to attract new businesses and business retention. The term of this plan is from July 1, 2017, through June 30, 2018. **The Third Year AAP Amendment 2017-18 will focus on the allocation of Neighborhood Stabilization Program (NSP) Program Income in the amount of \$1,130,633 for these services including Neighborhood Improvements and Affordable Housing opportunities in order to create suitable living environments and healthy neighborhoods.** The term of this plan is from **July 1, 2017, through June 30, 2018.**

To the extent feasible, the narrative for this Annual Plan will attempt to not duplicate the narrative for the Consolidated Plan. However, the outlines for the five-year plan and the annual action plan are very similar, so some repetition is unavoidable. Programs and activities described in this plan are intended to primarily benefit low and moderate income residents of City of Surprise, neighborhoods with high concentrations of low and moderate income residents, and the city as a whole. The City of Surprise CDBG program has been allocated \$638,560 in funding for

program year (PY) 2017-2018. The City of Surprise CDBG program will receive **\$1,130,633** in NSP program income funding for program year (PY) 2017-2018 through this plan Amendment.

2. Summarize the objectives and outcomes identified in the Plan

This could be a restatement of items or a table listed elsewhere in the plan or a reference to another location. It may also contain any essential items from the housing and homeless needs assessment, the housing market analysis or the strategic plan.

This Third Year AAP 2017-2018 implements the third year activities that will address goals established in the City of Surprise Consolidated Plan 2015-19. Consistent with the established objectives, CDBG funds will be used for:

Fifteen percent (\$95,784) of the CDBG allotted funds (\$638,560) will be utilized for public service activities through nonprofit organizations. Twenty percent (\$127,712) will be used for grant administrative expenses and (\$415,064) will be utilized for Neighborhood Infrastructure and Economic Development projects. This is in accordance to the regulations set by HUD.

This Third Year AAP 2017-2018 Amendment implements the third year activities that will address goals established in the City of Surprise Consolidated Plan 2015-19 Amendment. Consistent with the established objectives, CDBG funds will be used for:

\$517,570 of the NSP Program Income funds (\$1,130,633) will be utilized for neighborhood improvement activities, (\$113,063) will be used for grant administrative expenses and (\$500,000) will be utilized for Affordable Housing opportunities. This is in accordance to the regulations set by HUD.

3. Evaluation of past performance

This is an evaluation of past performance that helped lead the grantee to choose its goals or projects.

The City of Surprise evaluates its past performance every year as part of the Consolidated Annual Performance and Evaluation Report (CAPER) as required by HUD. The CAPER provided an estimate of *output* measures in compliance with HUD's data system. The CAPER includes measures of performance to quantify longer-term goals by incorporating projected *outcome* measures. Quantifiable results-oriented goals for capital programs are tied to a unified framework for the benefit of low- and moderate-income residents.

- Preserve neighborhoods through infrastructure improvements in the targeted low-income area(s)
- Provide public service activities to city's youth, seniors, special needs persons, veterans, persons and families in crisis, and disabled persons through nonprofit agencies or other city departments
- Preserve neighborhoods through housing rehabilitation assistance to qualified homeowners
- Preserve habitability of owner-occupied housing through emergency home repair assistance
- Provide economic development opportunities for residents in the targeted area
- Preserve affordability of quality rental housing through the Housing Choice Voucher program

4. Summary of Citizen Participation Process and consultation process

The City of Surprise recognizes the importance of citizen participation in the development and implementation of any plan or program. The Third Year AAP 2017-2018 was discussed at two separate meetings. The City Council workshop (April 4, 2017) and a public hearing (April 18, 2017). The Planning and Zoning Commission held a public meeting (March 2, 2017) specifically discussing the Third Annual Action Plan Public Service Funding 2017-2018 and a second meeting held March 16, 2017 to discuss Annual Action Plan priorities.

In April 2017 staff presented funding priorities to city council based on an approximate amount of \$585,139. With the release of the actual allocation, a third public hearing meeting was held on August 1, 2017 to solicit additional public comment and present to council amended amounts for funding priorities.

City Council public hearing was scheduled for March 20, 2018 to consider the proposed amendment. The Planning and Zoning Commission held a public hearing March 1, 2018 discussing the Annual Action Plan Year Three Funding Amendment 2017-2018.

These meetings are open to the public in order to encourage individuals and organizations to facilitate a public discussion and provide a means whereby, the public can actively participate in the planning and development of the city's CDBG Program. Citizens are encouraged to submit new project proposals and comments on past and proposed CDBG programs and projects. All dates and times for Commission public meetings are published on the city's website and in the Daily News-Sun local newspaper. The proposed projects and budgets selected by the City Council for CDBG funding were published in the local newspaper for citizen review along with meeting time information.

5. Summary of public comments

This could be a brief narrative summary or reference an attached document from the Citizen Participation section of the Con Plan.

The City of Surprise provided its residents many opportunities to provide input on the decision making process. See attached schedule.

No citizen comments were received as of the final submission of this plan.

6. Summary of comments or views not accepted and the reasons for not accepting them

None at this time

7. Summary

The Third Year AAP 2017-2018 represents the vision and goals for the neighborhood infrastructure improvements, community and economic development needs and housing activities and the available resources and a strategic plan for meeting those needs. The Third Year AAP 2017-2018 also identifies any funds to be used as a leverage to address goals and priorities in the plan through partnerships with local non-profit organizations. The Third Year AAP 2017-2018 Amendment represents the vision and goals for the neighborhood improvements, community and housing activities and the available resources and a strategic plan for meeting those needs. The Third Year AAP 2017-2018 Amendment also identifies any funds to be used as a leverage to address goals and priorities in the plan through partnerships with local non-profit organizations.

PR-05 Lead & Responsible Agencies - 91.200(b)

1. Agency/entity responsible for preparing/administering the Consolidated Plan

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

Agency Role	Name	Department/Agency
CDBG Administrator	SURPRISE	Human Service and Community Vitality

Table 1 – Responsible Agencies

Narrative

The lead agency for preparing the FY2017-2018 Annual Action Plan Year 3 was the City of Surprise Human Service and Community Vitality Department – Neighborhood Services Division (NSD). The Department is responsible for the administration of the Community Development Block Grant (CDBG), HOME Investment Partnership Program (HOME), and the Neighborhood Stabilization Program (NSP) grant programs.

Consolidated Plan Public Contact Information

Alicia Rubio, Neighborhood Services Coordinator

Human Service and Community Vitality, 16000 N. Civic Center Plaza, Surprise AZ 85374

623-222-3240 | alicia.rubio@surpriseaz.gov

AP-10 Consultation - 91.100, 91.200(b), 91.215(l)

1. Introduction

The City of Surprise is committed to obtaining input from citizens, city staff, non-profit agencies, non-profit developers, private developers, governmental agencies, and the Regional Continuum of Care as part of the Consolidated and Annual Action Plan processes. The 2017 Third Year AAP consultation included a combination of public meetings with community stakeholders, two community input hearings, newspaper advertisements, website announcements and placement of hard copies of the plan at 2 libraries, local senior center and city hall to solicit comments on the draft Annual Action Plan. Citizen participation was strongly encouraged throughout the processes of short and long range departmental planning, plan implementation, and assessment of plan effectiveness.

Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(l)).

As members of the Maricopa HOME Consortium we regularly coordinate with private industry, businesses and developers to foster the production of affordable housing and projects for special needs/homeless populations. The consortium also works closely with the real estate, construction and finance industries to implement other ongoing HOME and CDBG supported housing rehabilitation and production activities. The consortium may pursue the receipt of Low Income Housing Tax Credit (LIHTC) resources and associated private mortgage financing support for both construction and permanent loans, as well as tax-exempt bond financing where bonds are purchased by both institutional and retail investors. Surprise also allocates 15% of its CDBG allocation for public services.

Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness.

As members of the Maricopa HOME Consortium we committed to addressing the needs of homeless persons and persons at risk of experiencing homelessness. We participate in a regional Continuum of Care (CoC) plan in collaboration with the all other jurisdictions in Maricopa County. The Maricopa Association of Governments (MAG) plans and administers the Continuum of Care. Jurisdictions work together to

develop the CoC plan, provide human services to the homeless, and identify and address gaps in service. The CoC provides direction on planning and policy issues that impact the homeless population by making updates to the Regional Plan to End Homelessness and a consolidated application to the U.S. Department of Housing and Urban Development in support of programming that assists the county homeless and at risk population.

Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards for and evaluate outcomes of projects and activities assisted by ESG funds, and develop funding, policies and procedures for the operation and administration of HMIS

As an active member of the Maricopa County HOME Consortium we regularly consult with Maricopa Association of Governments (MAG), the lead agency for the Maricopa Regional Continuum of Care structure. Through consultation efforts with MAG and the CoC we align our priorities of the County's homeless strategies with Continuum-wide priorities for homelessness. The Maricopa HOME Consortium continues to actively participate in the CoC and contribute by determining its priorities for homeless persons and those at risk of experiencing homelessness

2. Agencies, groups, organizations and others who participated in the process and consultations

Table 2 – Agencies, groups, organizations who participated

1	Agency/Group/Organization	Housing Authority of Maricopa County
	Agency/Group/Organization Type	Housing
	What section of the Plan was addressed by Consultation?	Public Housing Needs
	Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	The Housing Authority of Maricopa County (HAMC) administers the public housing and Section 8 subsidized housing program within the City of Surprise. Surprise housing activities are planned and reported through the Maricopa Consortium Plan.
2	Agency/Group/Organization	CENTRAL ARIZONA SHELTER SERVICES
	Agency/Group/Organization Type	Services-homeless
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Strategy
	Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	The city enters into a sub recipient agreement through the CDBG public service set aside. The agency has been awarded funding for Program Years 2014-2016. The agency has been awarded \$5,000 for this program year.

3	Agency/Group/Organization	SURPRISE
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Victims of Domestic Violence Services-Health Services-Education Services-Employment Regional organization Grantee Department
	What section of the Plan was addressed by Consultation?	Homeless Needs - Families with children Anti-poverty Strategy Public Services
	Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	Surprise Resource Center is a division within the Human Service and Community Vitality Department. The Resource Center staff provided data to support the need of public services and the lack thereof. The Center offers a variety of services including veteran employment, job training and veteran job club, domestic violence and sexual abuse counseling, health education, WIC nutrition program and enrollment services for health insurance programs. The Resource Center also offers financial fitness workshops, credit counseling workshops and tax preparation at no cost to poverty level families and seniors.
4	Agency/Group/Organization	Maricopa Workforce Connections
	Agency/Group/Organization Type	Services-Employment
	What section of the Plan was addressed by Consultation?	Economic Development Anti-poverty Strategy

Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	Surprise entered into partnership with Maricopa County "Arizona@Work" program. The "Arizona@Work" program provided employment workshops and career fairs to Surprise residents.
---	--

Identify any Agency Types not consulted and provide rationale for not consulting

N/A

Other local/regional/state/federal planning efforts considered when preparing the Plan

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Continuum of Care	Maricopa Association of Governments	The city's needs and activities are planned and reported through the Maricopa Consortium Plan. See the Consolidated Plan for the Maricopa HOME consortium for a complete description of these activities.
City of Surprise Community Policing	Surprise Police Department	The police department in coordination with the Human Service and Community Vitality Department has taken the lead for the homeless point in time count for the last four years. They have helped to identify the chronically homeless individuals and locations of abandoned properties where known homeless tend to seek shelter in.

Table 3 - Other local / regional / federal planning efforts

Narrative The Maricopa Association of Governments Continuum of Care Subcommittee (MAG Continuum of Care) is the regional body that manages the collaborative efforts of communities and agencies in Maricopa County to plan for the needs of the homeless and access federal funding on behalf of agencies organized to address those needs. The 'Unsheltered Point in Time Count' led by MAG CoC in January 2016 reported that there are 16 homeless persons in the city which represents a 33% reduction over the previous year's data. However, the city will do a periodic assessment of any new homeless person cases in the city and will act accordingly to mitigate the problem by assisting with resource referrals.

P-12 Participation - 91.401, 91.105, 91.200(c)

1. Summary of citizen participation process/Efforts made to broaden citizen participation Summarize citizen participation process and how it impacted goal-setting

The City of Surprise is committed to obtaining input from citizens, staff, non-profit agencies, non-profit developers and other government agencies. The AAP citizen participation included a combination of meetings, three public meetings with hearings to solicit comments on the draft plan, which included a 30 day review period. The draft plan was placed at four central locations (2 libraries, senior center and city hall). The AAP draft was also placed on the city website during the 30 day comment period. The AAP 2017-2018 Amendment citizen participation plan included a combination of meetings, two public meetings with hearings to solicit comments on the draft plan, which included a 30-day review period. The draft plan was placed at four central locations (2 libraries, senior center and city hall). The AAP 2017-2018 Amendment draft was also placed on the city website during the 30-day comment period.

Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
1	Public Hearing	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities Non-targeted/broad community Residents of Public and Assisted Housing	Three public meetings with hearings were held on 3/2 and 3/16/17, 4/18/17 and 8/1/17 to further solicit input. AAP 3 Amendment-Two public meetings with hearings were held on 3/1/18 and 3/20/18	No public comments were submitted at public hearings (at this time).	N/A	

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
2	Newspaper Ad	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities	Public notices announcing the public hearings and the draft AAP 17-18 and the AAP 17-18 Amendment were placed in 2 newspapers of record in the City of Surprise. (Daily News-Sun and Surprise Today)	No comments received as of yet	N/A	

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
3	Internet Outreach	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities Non-targeted/broad community Residents of Public and Assisted Housing	Draft third Year AAP was made available on the city's internet site for 2-30 day public comment periods 3/16-4/16/17 and 7/10-8/10/17 Draft third Year AAP Amendment was made available on the city's internet site for 30 days during the public comment period 3/5-4/5/18	No comments received as of yet	N/A	http://www.surpriseaz.gov/2475/Consolidated-Plan

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
4	Public viewing	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities Non-targeted/broad community Residents of Public and Assisted Housing	Draft hard copies were placed in a central, public location for public viewing. Locations included city hall, 2 libraries and the Senior Center	No comments received as of yet	N/A	

Table 4 – Citizen Participation Outreach

Expected Resources

AP-15 Expected Resources - 91.420(b), 91.220(c)(1,2)

Introduction

Anticipated resources available includes cash match in the amount of approximately \$548,000. Also any anticipated program income will be used towards CDBG eligible projects.

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services Affordable Housing Opportunities	\$638,560	1,130,633		1,130,633		Actual allocation of \$638,560. Prior year rollover of approximately \$501,000 Program Income of \$1,130,633

Table 5 - Expected Resources – Priority Table

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

No matching funds are required for the CDBG program, however the city will leverage with staff time and the technical oversight provided in the form of project management. There is cash match available for the HOME program in the amount of approximately \$548,000 which is utilized as leverage.

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

The City of Surprise owns two public facilities in the Surprise Heritage District - the Senior Center and the AZ TechCelerator. The Senior Center has been slated for kitchen improvements which are to be completed during PY 18. The AZTechCelerator, formerly the Surprise City Hall is a city owned and run (community based) business incubator comprised of 60,000 square feet and four-building office complexes within the target area. The Second Phase of tenant improvements will be completed in FY18. The City of Surprise also owns the public right-away, streets, sidewalks and parks within the Surprise Heritage District in order to complete Neighborhood Improvements within the target area.

Discussion

The primary objective of the City of Surprise CDBG program is to foster the development, revitalization and preservation of neighborhoods to provide decent housing and a suitable living environment. The city recognizes the importance and impact of utilizing cash match and any program income as a leverage to eligible projects within the Surprise Heritage District.

AP-20 Annual Goals and Objectives - 91.420, 91.220(c)(3)&(e)

Goals Summary Information AAP 17-18

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Program Administration	2015	2019		ORIGINAL TOWNSITE		CDBG: \$127,712	Homeowner Housing Rehabilitated: 12 Household Housing Unit
2	Public Services	2015	2019	Public Service	ORIGINAL TOWNSITE	Public Services	CDBG: \$95,784	Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
3	Neighborhood Infrastructure Improvements	2016	2019	Neighborhood Infrastructure	ORIGINAL TOWNSITE	Neighborhood Improvements Economic Development	CDBG: \$184,653	Facade treatment/business building rehabilitation: 9 Business Businesses assisted: 4 Businesses Assisted
4	Senior Center Services	2015	2016	Non-Housing Community Development	ORIGINAL TOWNSITE	Senior Center Services	CDBG: \$20,000	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 250 Persons Assisted
5	Economic Development	2016	2019	Economic Development	ORIGINAL TOWNSITE	Economic Development	CDBG: \$60,000	Businesses assisted: 3 Businesses Assisted
6	Emergency Housing Rehabilitation	2015	2016	Affordable Housing	ORIGINAL TOWNSITE	Owner Occupied Housing Rehabilitation	CDBG: \$150,411	Homeowner Housing Rehabilitated: 15 Household Housing Unit

Goals Summary Information AAP 17-18 Amendment

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Program Administration	2017	2019	Administration	ORIGINAL TOWNSITE	Neighborhood Improvements Owner Occupied Housing Rehabilitation	CDBG: \$113,063	Program administration

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
2	Neighborhood Infrastructure Improvements	2017	2019	Neighborhood Improvements	ORIGINAL TOWNSITE	Neighborhood Improvements	CDBG: \$517,570	Infrastructure improvements
3	Affordable Housing Improvements	2017	2019	Affordable Housing	ORIGINAL TOWNSITE	Affordable Housing	CDBG: \$500,000	Affordable Housing

Table 6 – Goals Summary

Goal Descriptions AAP3 2017-2018

DRAFT

Goal Name	Program Administration
Goal Description	20% of annual allocation of \$638,560 is to be set aside for administration duties to carry forth the CDBG program.
Goal Name	Public Services
Goal Description	15% of Surprise annual allocation of \$638,560 will be allocated to public service activities through nonprofits agencies who serve those with special needs.
Goal Name	Neighborhood Infrastructure Improvements
Goal Description	Neighborhood Improvement Project at the AZTechCelerator will include Phase Two of tenant improvements of the TechCelerator/Business incubator owned by the City of Surprise. This project will create an area benefit by creating entrepreneurship and employment within the Original Town site of Surprise, a CDBG area-benefit eligible neighborhood.
Goal Name	Senior Center Services
Goal Description	There will be minor tenant improvements in the Surprise Senior Center kitchen. These improvements will enable staff to prepare additional meals for the patrons of the senior center.
Goal Name	Economic Development
Goal Description	Provide micro-enterprise grants for business development and business retention in the Surprise Heritage District. The minimum amount to be granted per applicant is \$1,000 with a maximum award of \$20,000.
Goal Name	Emergency Housing Rehabilitation
Goal Description	The Emergency Housing Repair Project will provide 15 emergency repair grants to address health and safety issues to owner-occupied homes who meet the income guideline of 80% or below median income within the Surprise Heritage District.

Goal Descriptions AAP3 2017-2018 Amendment

1	Goal Name	Program Administration
	Goal Description	20% of transfer of NSP program income of \$1,130,633 to be set aside for administration duties to carry forth the CDBG program

2	Goal Name	Neighborhood Infrastructure Improvements
	Goal Description	Neighborhood Improvement Project will include infrastructure improvements of city owned facilities. This project will create an area benefit by creating a suitable living environment within the Surprise Heritage District (Original Town Site) of Surprise, a CDBG area-benefit eligible neighborhood
3	Goal Name	Affordable Housing Improvements
	Goal Description	Development of affordable housing units within the Surprise Heritage District

-35 Projects - 91.420, 91.220(d)

Introduction

This section specifically identifies the projects that will take place during FY 2016-2017 with CDBG and HOME funding to address the priority needs and specific objectives as identified in the Consolidated Plan Strategic Plan section.

CDBG Funds: FY 2017-2018 CDBG Allocation is \$638,560.

HOME Funds: FY 2017-2018 HOME Allocation is \$136,506

Additionally, this section specifically identifies the projects that will take place during Program Year 2016-2017 with CDBG Program Income transfer to address the priority needs and specific objectives as identified in the Consolidated Plan Amendment Strategic Plan section.

CDBG Funds: FY 2017-2018 CDBG Program Income Transfer is \$1,130,633.

Any program income received during the program year will be retained and reported by the City of Surprise and used on CDBG and HOME eligible activities.

#	Project Name
1	Neighborhood Improvements
2	2017 Public Services
3	CDBG Administration

#	Project Name
4	HOME Housing Rehabilitation
5	Economic Development
6	Neighborhood Infrastructure Improvements
7	2017-2018 Emergency Home Repair
8	Neighborhood Improvements
9	Affordable Housing Opportunities
10	CDBG Administration

Table 7 – Project Information

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

The Surprise Heritage District area targeted for HOME/CDBG investment is the lowest- income Census

Tract within the City of Surprise. Neighborhood improvements will occur in this targeted area known as the Surprise Heritage District.

AP-38 Project Summary

Project Summary Information AAP 17-18

1	Project Name	Neighborhood Improvements
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Neighborhood Infrastructure Improvements
	Needs Addressed	Neighborhood Improvements Economic Development
	Funding	CDBG: \$184,653
	Description	Phase 2 of tenant improvements of the AZ TechCelerator Business incubator owned by the City of Surprise
	Target Date	6/29/2018
	Estimate the number and type of families that will benefit from the proposed activities	15 families.
	Location Description	Surprise Heritage District - 12425 W. Bell Rd. Surprise, AZ 85378
	Planned Activities	Phase 2 of tenant improvements of AZ TechCelerator/Business incubator owned by the City of Surprise.
2	Project Name	2017 Public Services
	Target Area	ORIGINAL TOWNSITE

	Goals Supported	Public Services
	Needs Addressed	Public Services
	Funding	CDBG: \$95,784
	Description	Public service activities through nonprofit agencies.
	Target Date	11/30/2018
	Estimate the number and type of families that will benefit from the proposed activities	Approximately 150 low to moderate income families particularly clients who are seniors, youth, veterans/homeless and special needs population.
	Location Description	Activities will be undertaken within the City of Surprise and provide a benefit to residents who meet the program requirements.
	Planned Activities	Provide public service benefits to youth, seniors, veterans, homeless and special needs population.
3	Project Name	CDBG Administration
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Program Administration
	Needs Addressed	
	Funding	CDBG: \$127,712
	Description	20% of annual allocation set aside for CDBG program administrative duties.
	Target Date	11/29/2018
	Estimate the number and type of families that will benefit from the proposed activities	N/A
	Location Description	Activities will be undertaken within the City of Surprise.
	Planned Activities	Administrative duties administered for the CDBG program.
4	Project Name	HOME Housing Rehabilitation
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Neighborhood Infrastructure Improvements
	Needs Addressed	Neighborhood Improvements Owner Occupied Housing Rehabilitation
	Funding	CDBG: \$150,411

	Description	Provide substantial rehabilitation for low to moderate income residents.
	Target Date	11/30/2018
	Estimate the number and type of families that will benefit from the proposed activities	5 families will be assisted with the HOME Rehabilitation program and the CDBG Emergency Home Repair program.
	Location Description	Activities will be undertaken within the City of Surprise - Original Town Site aka Heritage Overlay District, but offered city-wide.
	Planned Activities	Substantial rehabilitation up to \$25,000. If home is over 50 years old the city can invest up to \$35,000. The CDBG Emergency Home Repair program can provide up to \$10,000 in grant funding.
5	Project Name	Economic Development
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Economic Development
	Needs Addressed	Economic Development
	Funding	CDBG: \$60,000
	Description	Micro-Enterprise grants to provide assistance to new businesses or business retention. Total award is \$60,000; grants to be a minimum of \$1,000 to a maximum of \$20,000 per applicant.
	Target Date	11/29/2018
	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that up to 60 families can be assisted.
	Location Description	The location of business to be assisted will be in the Surprise Heritage District.
	Planned Activities	Micro-Enterprise grants to assist new businesses and business retention.
6	Project Name	Neighborhood Infrastructure Improvements
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Neighborhood Infrastructure Improvements Senior Center Services
	Needs Addressed	Neighborhood Improvements Senior Center Services
	Funding	CDBG: \$20,000

	Description	Senior Center large appliance replacement.
	Target Date	11/29/2018
	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that approximately 750 seniors may benefit from the improvements.
	Location Description	Senior Center located in the Surprise Heritage District aka Original Town Site.
	Planned Activities	Planned activities will include upgrade of the stove and refrigerator in the Senior Center.
7	Project Name	2017-2018 Emergency Home Repair
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Emergency Housing Rehabilitation
	Needs Addressed	Owner Occupied Housing Rehabilitation
	Funding	CDBG: \$150,411
	Description	Provide emergency repair assistance to 15 families who meet income guidelines.
	Target Date	11/29/2018
	Estimate the number and type of families that will benefit from the proposed activities	Up to 15 families will be provided emergency home repair.
	Location Description	Residents who reside within the City of Surprise.
	Planned Activities	Provide emergency home repair in order to correct health and safety issues for low to moderate income residents.

AP-38 Project Summary

AAP17-18 Amendment

Project Summary Information1	Project Name	Neighborhood Improvements
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Neighborhood Infrastructure Improvements
	Needs Addressed	Neighborhood Improvements
	Funding	CDBG: \$517,570
	Description	Gaines Park and infrastructure improvements within the Surprise Heritage District
	Target Date	4/1/2018
	Estimate the number and type of families that will benefit from the proposed activities	50 families
	Location Description	Surprise Heritage District
	Planned Activities	Neighborhood improvements.
2	Project Name	Affordable Housing Opportunities
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Affordable Housing
	Needs Addressed	Housing
	Funding	CDBG: \$500,000
	Description	Provide Affordable Housing Opportunities within the Surprise Heritage District.
	Target Date	4/1/2018
	Estimate the number and type of families that will benefit from the proposed activities	Approximately 100 low to moderate income families particularly clients who are seniors, youth and veterans
	Location Description	Activities will be undertaken within the City of Surprise and provide an area benefit to residents.

	Planned Activities	Affordable Housing
3	Project Name	CDBG Administration
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Administration
	Needs Addressed	Program Administration
	Funding	CDBG: \$113,063
	Description	20% of CDBG program income transfer of \$1,130,633 for administrative duties.
	Target Date	4/1/2018
	Estimate the number and type of families that will benefit from the proposed activities	100 families
	Location Description	Activities will be undertaken within the City of Surprise target area
	Planned Activities	Administrative duties administered for the CDBG program

AP-50 Geographic Distribution - 91.420, 91.220(f)

Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

Surprise has one area of minority concentration. The Hispanic population makes up 82% of Census Tract 608 and totals 22,856 residents as per census 2010. This census tract includes the entire Original Town site and is the only area where a majority of the residents are low- and moderate-income.

Geographic Distribution

Target Area	Percentage of Funds
ORIGINAL TOWNSITE	100

Table 8 - Geographic Distribution

Rationale for the priorities for allocating investments geographically

All area benefit activities included in the 5 Year Strategic Plan will take place in the Original Town Site a.k.a Surprise Heritage District area. The city has a Council appointed resident group - the Planning and Zoning Commission, which monitor the implementation of the Specific Plan for the Revitalization of the Surprise Heritage District. Resources recommended by this commission include CDBG funds and general funds set aside for the revitalization of the Surprise Heritage District.

Discussion

Although the City of Surprise Heritage District has had higher concentration of low to moderate income residents, our services are income based therefore eligibility can be city wide as long as the income limits are met. The neighborhood improvements will occur within the Surprise Heritage District to further area benefit revitalization efforts.

AP-75-Barriers to affordable housing – 91.420,91-220(j)

Introduction

Barriers to affordable housing have been identified through the Maricopa HOME Consortium and the City of Surprise. Plans to take to remove or ameliorate the negative effects of public policies will be to affirmatively market fair housing and overcome identified barriers to affordable housing. These efforts in collaboration with the Consortium have resulted in the creation of a Fair Housing Plan. The plan includes development of specific goals and objectives to overcome barriers to affordable housing. The Consortium is in the process of updating the Maricopa County Regional Analysis of Impediments to Fair Housing Choice through consultants further documenting impediments to fair housing choices including lack of accessible housing and housing discrimination against persons with disabilities, lack of awareness of fair housing laws, the cost of affordable housing limiting housing choice, poor financial history of potential homebuyers, lack of transportation options in rural unincorporated Maricopa County, and distribution of resources.

Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment:

During the PY 2017-18, the following actions will contribute to the removal of barriers to affordable housing:

1. Surprise will dedicate resources to preservation and development. Surprise has newly created a specific zoning district to further delineate specific zoning districts in the original town site (OTS) to enhance preservation and development. This district is known as the “Surprise Heritage District” (SHD). The intent of this district is to enhance and protect the historic character of the area. Two overlay districts, “residential neighborhood overlay” and the “art & entertainment district” is to support the residents to preserve and protect their neighborhood and to promote the local arts and culture business opportunities.
2. The city’s allocation of HOME funds to major rehabilitation. Surprise also utilizes general funds on HOME eligible rehabilitation projects to match HOME expenditures for housing rehabilitation. The city maintains a match log and match is applied at the time of requests for reimbursement from Maricopa County Community Development.
3. City general revenues for beautification. Pride Day activities generally happen twice annually and are paid for with General Funds
4. The Neighborhood Stabilization Program (NSP) funding will assist in acquisition, rehabilitation, disposition, and homebuyer assistance to program eligible applicants at or below 50%-120% or Area

Median Income (AMI). These funds are required by the Wall Street Reform and Consumer Protection Act of 2010 (Dodd-Frank Act). Target areas for this funding are established by a HUD mapping tool that

5. Program Income from the Neighborhood Stabilization Program (NSP) funding has been reprogrammed into the CDBG program. This will assist in neighborhood improvements, potential tax credit projects within the Surprise Heritage District to offer affordable housing opportunities and program administration for community development and revitalization efforts located within the Surprise Heritage District-Original Town Site.

Discussion:

In furthering the discussion of actions that will be undertaken to remove the barriers of affordable housing, city council adopted the Surprise Heritage District (zoning overlay) in June 2016. This district will allow the flexibility of the type of structures allowed in the new zoning districts to include cottage industries, which allow small individual owned business in a residential area and permit manufactured homes within the neighborhood as another option for diversified housing opportunities in the target area. The adoption of the "SHD" will also offer development incentives such as reduction in setback requirements and 100% waiver of development impact fees. This action will further support Surprise's intent to ameliorate public policies which are barriers to affordable housing.

AP-85 Other Actions - 91.420, 91.220(k)

Introduction

The primary categories of needs to be addressed in the plan are neighborhood improvements to include economic development, public services to eligible populations and emergency housing rehabilitation

The proposed amendments in the plan are neighborhood improvements and affordable housing opportunities. These projects will be carried out with the NSP Program Income transfer into the CDBG Annual Action Plan 3 amendment.

Actions planned to address obstacles to meeting underserved needs

One of the main obstacles to meeting community needs is inadequate resources for programs. The decline in resources across sectors, including government agencies and foundations, due to the economic downturn has negatively impacted the quantity and quality of housing and community development services. Although federal stimulus funding helped to mitigate this trend to some extent, resources for these programs will likely be limited for the near future.

The City of Surprise has partnered with various social service agencies which are housed at the Surprise Resource Center located in the Surprise Heritage District. The services offered are veteran employment services, veteran job training club, employment workshops, career fairs, services for domestic violence and sexual abuse, Women, Infant and children (W.I.C) nutrition program, enrollment services for health insurance, programs, access to food and nutrition resource (SNAP, TANF, AHCCCS and navigation of the Affordable Care Act. The Resource Center also offers financial fitness workshops, tax preparation to poverty level families and credit counseling workshops.

Actions planned to foster and maintain affordable housing

The City of Surprise has an active strategy to promote homeownership and the preservation and management of existing residential property. To offset the increasing cost of housing in the private market, the city has undertaken a number of strategies to preserve and develop new affordable housing. These strategies include:

1. The use of general funds and HOME funds for the preservation of existing affordable owner-occupied housing.
2. Support of for-profit and nonprofit developers in the construction of Tax Credit assisted rental housing for families and seniors.
3. Development of Original Town Site (also known as the Surprise Heritage District) Revitalization Plan which has already resulted in public investment in community facilities, infill construction of mixed

income owner-occupied homes and specific zoning districts.

Actions planned to reduce lead-based paint hazards

Housing units assisted under any and all programs covered under this Consolidated Plan are inspected and/or tested prior to assistance as follows:

- a. The Housing Authority of Maricopa County inspects all rental units prior to occupancy by households who have Housing Choice Vouchers. For units built before 1978, chipped or peeling paint must be removed prior to occupancy.
- b. For units built before 1978, chipped or peeling paint must be removed prior to occupancy. Renter and owner-occupied units built before 1978 that are being rehabilitated with CDBG or HOME funds must be professionally assessed and abated as part of the assistance contract.
- c. Lead-based paint is not allowed or sold for residential construction after 1978. Newly constructed single-family or multifamily residences assisted with funding from the covered grants will be free of lead paint hazards.

Actions planned to reduce the number of poverty-level families

The Housing Authority of Maricopa County (HAMC) has two public housing developments in Surprise and administers Housing Choice Vouchers in the private rental market. The operations of HAMC in Surprise have not been formalized since Surprise incorporated as a city and an intergovernmental agreement would be beneficial.

The City of Surprise has partnered with various social service agencies which are housed at the Resource Center located in Surprise Heritage District. The services offered are veteran employment services, veteran job training club, services for domestic violence and sexual abuse, Women, Infant and children (W.I.C) nutrition program, enrollment services for health insurance, programs, access to food and nutrition resource (SNAP, TANF, AHCCCS and navigation of the Affordable Care Act. The Resource Center also offers financial fitness workshops, tax preparation to poverty level families and credit counseling workshops.

Actions planned to develop institutional structure

The City of Surprise is the clearinghouse and facilitator for the activities as described by the Consolidated Plan. The Neighborhood Services Division of the Human Service and Community Vitality Development Department oversees the administration of all CDBG and HOME entitlement programs. The department is responsible for:

- Program management and oversight

- Interdepartmental coordination
- Sub recipient contract administration and monitoring
- Program evaluation
- Consolidated Plan preparation, monitoring and evaluation
- Required reporting to HUD

Divisions within the Human Service and Community Vitality Department include the Resource Center which provides a one-stop-shop for social services. (see above action plan to reduce number of poverty-level families) Other departments and private agencies that participate in the implementation of federal, state and county-funded grants include:

- City Council - formal approval body for policy making and release of funds
- The Public Works Department - has experience in administering the procurement and Labor Standards requirements of federally funded projects. The Engineering Department within Public Works administers the Capital Improvement Plan, which includes projects located within the Surprise Heritage District
- Financial management will be appropriately separated between the Finance Department and Human Service and Community Vitality Department

Actions planned to enhance coordination between public and private housing and social service agencies

The City of Surprise has partnered with various social service agencies which are housed at the Resource Center located in the Surprise Heritage District. The services offered are veteran employment services, veteran job training club, services for domestic violence and sexual abuse, Women, Infant and children (W.I.C) nutrition program, enrollment services for health insurance, programs, access to food and nutrition resource (SNAP, TANF, AHCCCS and navigation of the Affordable Care Act. The Resource Center also offers financial fitness workshops, tax preparation to poverty level families and seniors and credit counseling workshops.

The city is also carrying out public service activities under the CDBG program through an open application process. The city utilizes CDBG and HOME funds for emergency home repair and owner-occupied housing rehabilitation. The city is undertaking discussions at senior management level with Maricopa County and other public private entities in order to create more affordable housing units within the Surprise Heritage District.

Discussion

The city is committed to preserving neighborhoods through neighborhood infrastructure improvements in the target area. **Affordable Housing is identified as a high priority in the Consolidated an Amendment.**

Program Specific Requirements

AP-90 Program Specific Requirements - 91.420, 91.220(l)(1,2,4)

Introduction

At the beginning of Program Year 2016-2017 we do not anticipate any program income; however we will budget approximately \$22,000.

Community Development Block Grant Program (CDBG)

Reference 24 CFR 91.220(l)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	22,000
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan.	0
3. The amount of surplus funds from urban renewal settlements	0
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan	0
5. The amount of income from float-funded activities	0
Total Program Income:	22,000

Other CDBG Requirements

1. The amount of urgent need activities	0
2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income. Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	100.00%

Discussion

Due to program requirements we foresee 100% of CDBG funds be used for extremely low to moderate income residents. All activities are deemed eligible for funding and have met environmental clearance in the projects requiring said clearance.

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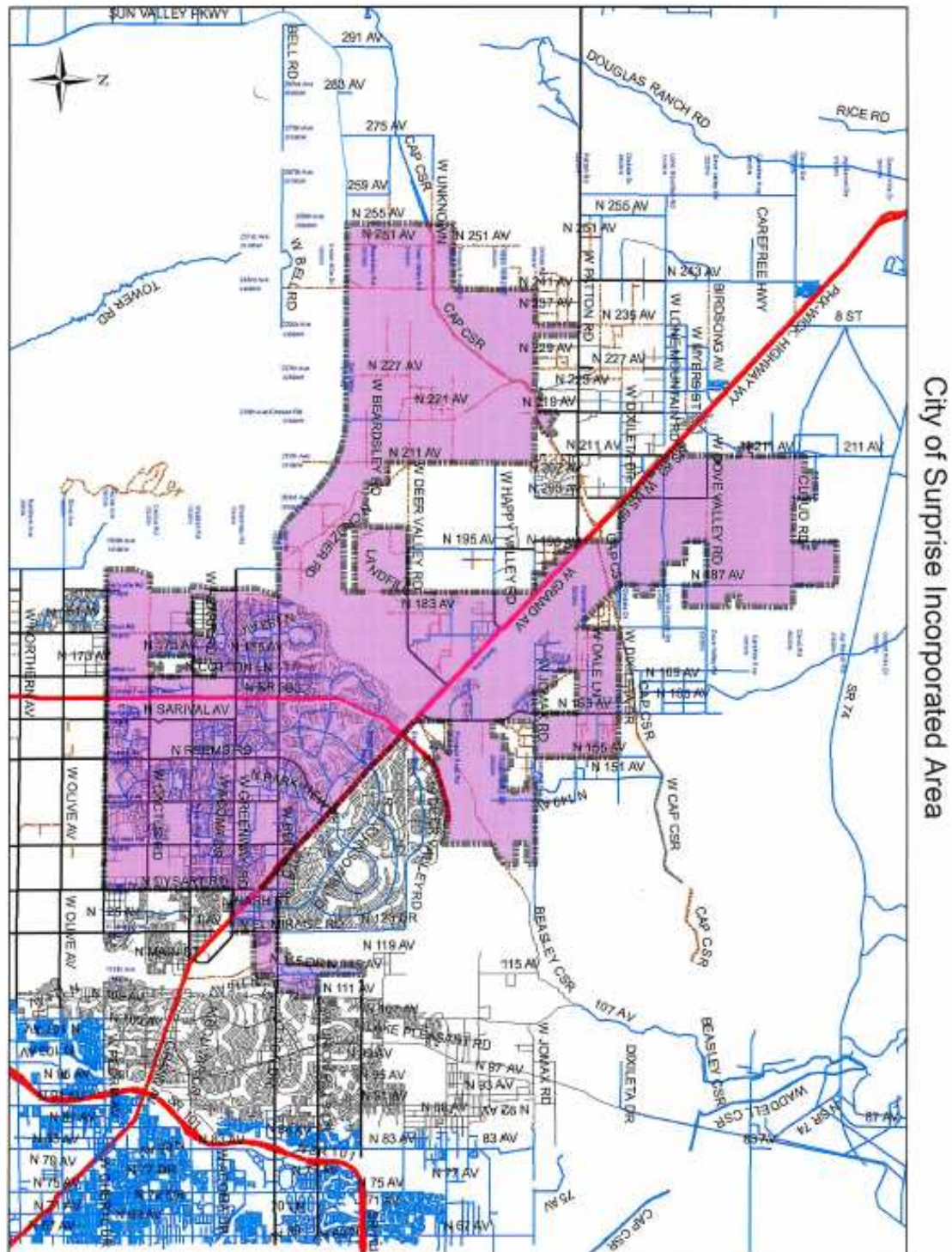
Appendix 1 – Public Notices

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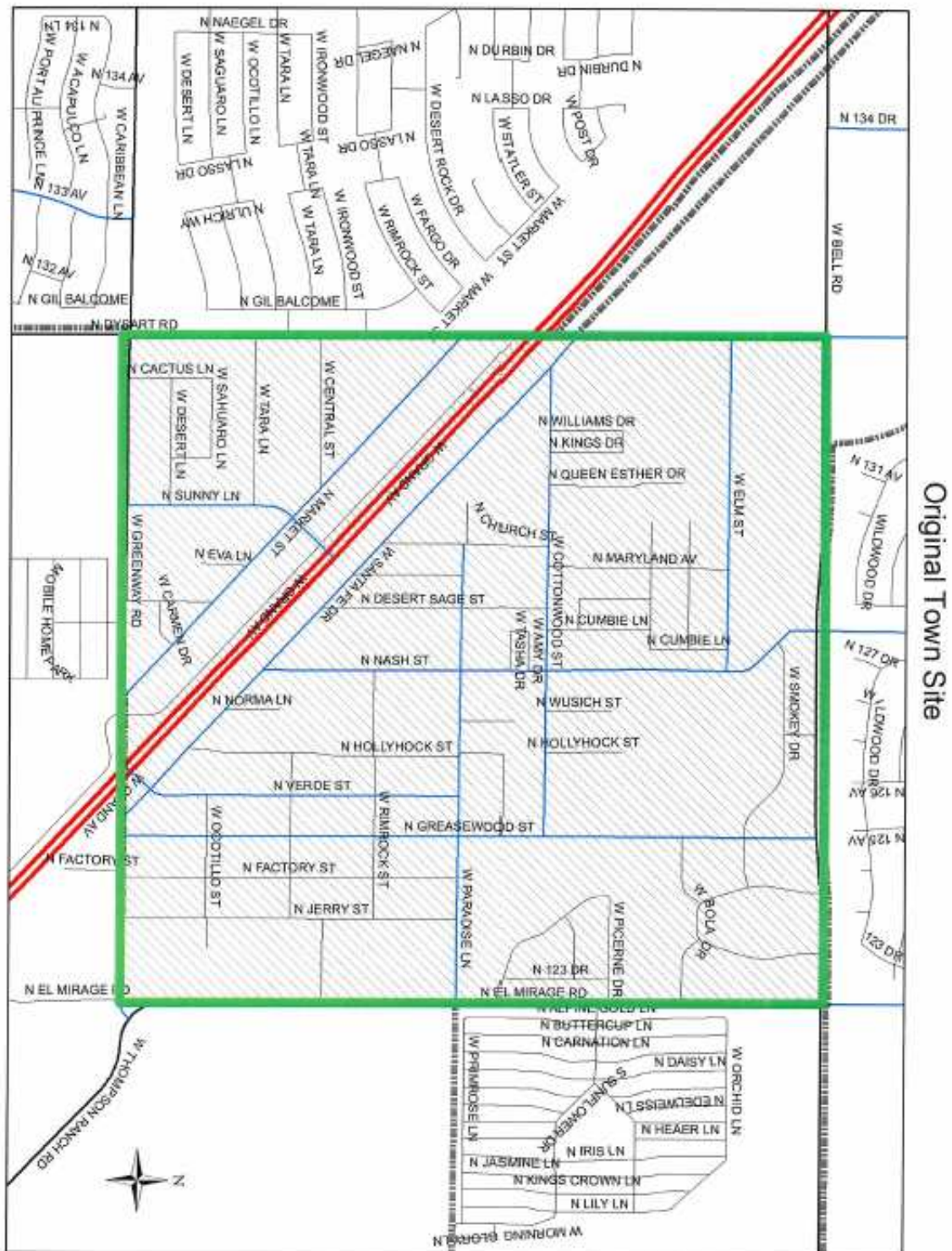
Appendix 1 – Public Notice 2

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Appendix 2 – Geographical Maps: Map 1 Incorporated Area – Surprise



Appendix 2 – Geographical Maps: Map 2 Surprise Heritage District (Original Town Site)



Appendix 3 – Continuum of Care Unsheltered Street Count: Table 1

Unsheltered Street County by Municipality (2013-2017):

All communities participate in the unsheltered homeless count conducted during the last week of January. Numbers for all communities with the exception of Phoenix are a direct census of individuals interviewed by volunteers, law enforcement, and outreach workers. The City of Phoenix conducts a survey using an extrapolation method by which areas are designated "high density" or "low density" areas. Direct counts in those areas are then extrapolated to estimate the number of individuals experiencing homelessness in unsheltered situations within the City of Phoenix geographic boundaries.

Municipality	2017	2016	2015	2014	2013
Apache Junction	0	0	0	0	0
Avondale	27	37	20	12	5
Buckeye	0	0	0	0	0
Carefree	0	0	0	0	0
Cave Creek	0	2	1	0	0
Chandler	27	14	31	18	20
El Mirage	0	0	0	0	7
Fountain Hills	0	0	0	0	0
Gila Bend	7	9	0	0	0
Gilbert	2	1	1	0	0
Glendale	57	44	25	39	16
Goodyear	7	7	1	2	4
Guadalupe	0	8	0	5	12
Litchfield Park	0	0	0	0	0
Mesa	130	95	155	55	42
Paradise Valley	0	0	0	0	0
Peoria	22	31	30	13	0
Phoenix	1508	1235	994	771	1339
Queen Creek	1	1	0	0	0
Scottsdale	50	67	0	39	11
Surprise	16	6	7	0	0
Tempe	202	88	24	97	125
Tolleson	0	0	0	2	0
Wickenburg	1	0	0	0	0
Youngtown	2	1	0	0	0
Total	2059	1646	1289	1053	1581



2013-2017 POINT IN TIME COUNT | Maricopa Regional Continuum of Care

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: CDBG Annual Action Plan 2017-18 Amendment

OVERALL PUBLIC INVOLVEMENT LEVEL:

Public Hearing on 3/1/18 (P & Z Meeting) and 3/20/18 Council Meeting. 30 day Public comment period (3/5- 4/5/18) for draft Annual Action Plan 2017-18 Amendment

IDENTIFY STAKEHOLDERS:

OTS residents/property owners, public service nonprofits, City of Surprise staff; Public Works, Community Development, Economic Development and Human Services.

OBJECTIVES:

Create viable neighborhoods, provide decent, safe and affordable housing; Low to moderate income resident job creation; provide services to those with special needs

PUBLIC ENGAGEMENT STRATEGIES & TOOLS:

Public Engagement & Project timeline:

Public outreach time frame (when to when) Public Hearings 3/1; 3/20 & 3/5-4/5/18 30 day pub.comm
Future Council Work Session/Meetings target dates 3/20/18
Election dates (if applicable)
Project start/completion dates 11/2018

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
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

Back Print

Board Meeting Date:	March 1, 2018	Contact Person:	Seth Dyson, Human Service & Community Vitality
Submitting Department:	CD Boards and Commissions	District:	Internal
Staff Recommendations:	Approve		

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

Agenda Wording:

Consideration and action on funding recommendations for Public Service Activities for the Community Development Block Grant Program Year 2018-19.

Motion:

I move to recommend approval to the Mayor and City Council the 2018-2019 Community Development Block Grant Public Service Funding recommendations as discussed.

Background:

As an entitlement city, Surprise receives a yearly allotment of Community Development Block Grant (CDBG) funding from the U.S. Department of Housing and Urban Development (HUD). Per grant guideline, the city has the ability to designate up to 15% of the grant award to fund eligible public services with the intent of serving low to moderate-income persons within the City of Surprise. The anticipated amount under discussion is \$95,784.

Financial Impact Statement:

CDBG public service grant funds will be utilized to fund the approved applicants. CDBG Public Service funding is limited to 15% of the annual CDBG allocation for the program year (PY). Funding from HUD for PY 2018-19 is not yet determined. The anticipated amount under discussion is \$95,784.

ATTACHMENTS:

Click to download

- ☐ [Staff Report](#)
- ☐ [Presentation](#)
- ☐ [Public Engagement Form](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

Seth Dyson, Director, Human Service & Community Vitality

Alicia Rubio, Neighborhood Services Program Coordinator



HUMAN SERVICES AND COMMUNITY VITALITY

Date: March 1, 2018

To: Planning and Zoning Commission Members

From: Seth Dyson, Human Services and Community Vitality Director
Jason Hughes, Acting Neighborhood Services Supervisor
Alicia Rubio, Neighborhood Services Coordinator

Re: CDBG-Funded Public Service Activities

Introduction

As an entitlement city, Surprise receives a yearly allotment of Community Development Block Grant (CDBG) funding from the U. S. Department of Housing and Urban Development (HUD). Per grant guidelines, the city has the ability to designate up to 15% of the grant award to fund eligible public services with the intent of serving low- to moderate-income persons within the City of Surprise.

Today's Planning and Zoning Commission Public Hearing meeting is aimed at assisting the Commission on recommending applicant(s) to City Council from the applications received. Upon approval by City Council, the CDBG Public Services Activities will be submitted to HUD as part of the Annual Action Plan for 2018-19.

Background

CDBG Public Service Activities can be carried out by either city departments or qualified nonprofit organizations that are interested in providing services that address one or more of the public service needs targeted in the city's Consolidated Plan. CDBG public service funds can be used to provide a variety of public services, such as child care, health services, job training, youth services, and recreation activities for low- to moderate-income individuals and families.

According to HUD regulations, CDBG funds may be used to provide public services (including labor, supplies, materials and other costs), provided the public service is:

- A new service or a quantifiable increase in the level of a service (for city-initiated projects only).
- Serves low- to moderate-income persons in the City of Surprise through area benefit or serving a particular clientele like seniors or homeless persons.

Funding Limit

CDBG Public Service funding is limited to 15% of the annual CDBG allocation for the program year (PY). For example, the CDBG allocation for City of Surprise for the PY 2017-18

was \$638,560, thus the funding awarded to applicants did not exceed \$95,784.00. Anticipated funding from HUD for PY 2018-19 is approximately \$638,560.

Previous Actions

Last year the city awarded funding to seven area non-profits, to include:

- Aid to Adoption of Special Kids was awarded \$4,064.50 for foster parent counseling
- Benevilla was awarded \$15,713.50 to provide adult day care, preschool and food delivery assistance
- Central Arizona Shelter Services was awarded \$9,010.50 to provide emergency shelter services.
- Mentally Ill Kids was awarded \$9,010.50 for mentally challenged kid counseling.
- Sojourner was awarded \$7,010.50 for human trafficking and domestic violence awareness training.
- St. Mary's Food Bank was awarded \$11,004 for emergency food boxes.
- Sun Health was awarded \$18,960 for health care transition program.
- City of Surprise Resource Center was awarded \$21,010.50 for crisis assistance.

Updated Actions

The Request for Application for CDBG Public Service Activities for PY 2018-19 was released on January 10, 2018. Applications were due January 31, 2018. Staff has evaluated the eligible applications as per the scoring rubric approved by the Planning and Zoning Commission.

Staff's funding recommendations are as follows:

St. Mary's Food Bank	\$12,000
City of Surprise-SYEP	\$15,000
City of Surprise-Crisis Assistance	\$23,500
Sojourner Center	\$5,000
Benevilla	\$8,000
CASS	\$5,000
New Leaf	\$5,000
St. Vincent de Paul	\$2,700
Sun Health	\$8,000
Northwest Valley Connect	\$5,000
Youngtown Comm. Fund	\$1,584
WHAM	\$3,000
Potter's House	\$2,000
Lutheran Social Services	\$0
MVP	\$0
Total Public Service Funding	\$95,784
Total Anticipated CDBG Allocation	\$638,560

Future Actions

- City Council Workshop: April 3, 2018
- City Council Public Hearing and approval April 17, 2018
- Submission to HUD as part of Annual Action Plan 2018-19 by May 15, 2018

Recommendations

Approval of Public Service funding recommendations.



Public Service Activities

**Annual Action Plan
2018-2019**

Human Service & Community Vitality | March 1, 2018



Today's Objectives

- CDBG Public Services Grant process
- Applicant Evaluation
- Funding Discussion



CDBG Public Services Grant

Background

- City of Surprise is a Direct CDBG Entitlement Community
- Yearly Funding Through CDBG program
 - Received \$638,560 for 2017-18
 - Funding amount for 2018-19 (anticipated) \$638,560
- 15 % of Allotment- For **Public Services**
 - Estimated \$95,784 available



Process Timeline

January 10, 2018

– January 31,
2018

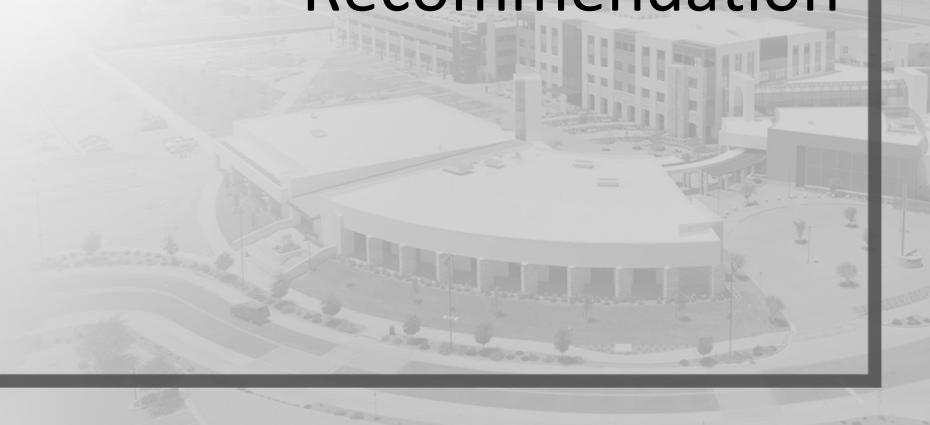
Application
Period

February 15, 2018

P & Z Public
Hearing

March 1, 2018

P & Z Public
Hearing and
Recommendation





Process Timeline

April 3 and 17, 2018

Council Workshop,
Public Hearing and
Recommendation

May 15, 2018

Submit Action Plan to
HUD



CDBG Goals - Public Services

National Objectives Surprise Will Meet

- Benefit Low to Moderate Income (LMI) Persons
- Area benefit
- Limited Clientele





Application Description

Applicant	Project Name	Requested Amount	Eligibility
Benevilla	Home Delivered Meals, Full/Part Time Day Care, Adult Day Care	\$25,017	Low/Mod Clientele
Lutheran Social Services of the Southwest	Family SPOT (Strength with Parenting Opportunities and Teaching)	\$67,075.20	Low/Mod Clientele
Central Az Shelter (CASS)	Emergency Shelter for Single Adults and Families with Children	\$10,000	Low/Mod Clientele
St. Mary's Food Bank	Emergency Food Box Program	\$15,000	Low/Mod Clientele
Sojourner Center	Human Trafficking Awareness and Education	\$10,000	Low/Mod Clientele
	Continued on next slide		



Application Description

Applicant	Project Name	Requested amount	Eligibility
MVP	Baseball Academy	96,000	Youth Services
Youngtown Medical Lending	Medical Lending Program	\$2,000	Low/Mod Clientele
NW Valley Connect	Transportation Call Center	\$20,000	Low/Mod Clientele
A New Leaf	Faith House Women's Crisis Shelter	\$10,000	Low/Mod Clientele
SYEP	Summer Intern Program	\$15,000	Low/Mod Clientele
	Continued on next slide		



Application Description

Applicant	Project Name	Requested amount	Eligibility
Potter's House	Dream Team	\$18,500	Youth Services
Wham!	Path to Healing	\$8,986	Low/Mod Clientele
St. Vincent de Paul	Utility & Rental Assistance	\$7,000	Low/Mod Clientele
City of Surprise	Crisis Assistance	\$30,000	Low/Mod Clientele
SYEP	Summer Intern Program	\$15,000	Low/Mod Clientele
	REQUEST TOTAL	\$359,578.20	



Application Evaluation

Applicant	Awarded Points	Recommended Amount
St. Mary's Food Bank	98.8	\$12,000
City of Surprise-SYEP	96.4	\$15,000
City of Surprise-Crisis Assistance	93.4	\$23,500
Sojourner Center	90.1	\$5,000
Benevilla	88.6	\$8,000
CASS	88.3	\$5,000
New Leaf	85.1	\$5,000
St. Vincent de Paul	82.9	\$2,700



Application Description

Applicant	Awarded Points	Recommended Amount
Sun Health	80.0	\$8,000
Northwest Valley Connect	76.1	\$5,000
Youngtown Comm. Fund	77.3	\$1,584
WHAM	64.9	\$3,000
Potter's House	64.0	\$2,000
Lutheran Social Svcs.	52.0	\$0
MVP	35.0	\$0
Total Recommendation:		\$95,784



S U R P R I S E

A R I Z O N A

QUESTIONS OR COMMENTS?

Jason Hughes
Human Service & Community Vitality
Neighborhood Services Acting Supervisor

Alicia Rubio
Human Service & Community Vitality
Neighborhood Services Program
Coordinator

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: CDBG Public Service Activities 2018-2019

OVERALL PUBLIC INVOLVEMENT LEVEL:

Public Hearing on 3/1/18 (P & Z Meeting) and 4/17/18 Council Meeting. 30 day Public comment period (3/5/18 - 4/5/18) for draft Annual Action Plan

IDENTIFY STAKEHOLDERS:

OTS residents/property owners, public service nonprofits, City of Surprise staff Public Works, Community Development, Economic Development and Human Services.

OBJECTIVES:

Create viable neighborhoods, provide decent, safe and affordable housing; Low to moderate income resident job creation; provide services to those with special needs

PUBLIC ENGAGEMENT STRATEGIES & TOOLS:

Public Engagement & Project timeline:

Public outreach time frame (when to when) Public Hearings 3/1 & 4/17/18, 30 day public comment
Future Council Work Session/Meetings target dates 4/3/18 & 4/17/18
Election dates (if applicable)
Project start/completion dates 10/2018

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
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

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

Board Meeting Date:	March 1, 2018	Contact Person:	Seth Dyson, Human Service & Community Vitality
Submitting Department:	CD Boards and Commissions	District:	Citywide
Staff Recommendations:	Approve		

Consent	Regular	Public Hearing	x	Report/Discussion
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Agenda Wording:

Consideration and action on the funding priorities for the Community Development Block Grant Program Fourth Year Annual Action Plan for Year 2018-2019.

Motion:

I move to recommend approval to the Mayor and City Council the funding priorities for the Community Development Block Grant Program Annual Action Plan Year 2018-19.

Background:

As an entitlement city, Surprise receives a yearly allotment of CDBG funding from the U.S. Department of Housing and Urban Development (HUD).

CDBG Administration, Commercial Property/Building Improvements and Emergency Housing Repairs outlined as the 2018-2019 funding priority will continue to assist with Infrastructure needs identified in the city's Consolidated Plan 2015-2019. The anticipated funding amount under discussion is \$638,560.

Financial Impact Statement:

This agenda item will allow for Community Development Block Grant expenditures for up to \$638,560. There is no city match requirement.

ATTACHMENTS:

Click to download

- ☐ [Staff Report](#)
- ☐ [Annual Action Plan 2018-19](#)
- ☐ [Presentation](#)
- ☐ [Public Engagement Form](#)

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):

Seth Dyson, Director, human Service & Community Vitality

Alicia Rubio, Neighborhood Services Program Coordinator



HUMAN SERVICE AND COMMUNITY VITALITY

Date: March 1, 2018

To: Planning and Zoning Commission Members

From: Seth Dyson, Director
Jason Hughes, Acting Neighborhood Services Supervisor
Alicia Rubio, Neighborhood Services Coordinator

Re: CDBG- 2018-2019 Annual Action Plan Funding Priorities

Introduction

As an entitlement city, Surprise receives a yearly allotment of Community Development Block Grant (CDBG) funding from the U. S. Department of Housing and Urban Development (HUD). Per grant guidelines, the city has the ability to designate up to 85% of the grant award to fund eligible administrative, neighborhood improvements and economic development services with the intent of serving low to moderate income persons within the City of Surprise.

Today's presentation to the Planning and Zoning Commission will provide information to assist the Commission in deciding if proposed projects meet grant criteria while filling community needs. Once the recommendation is determined, it will be forwarded to Council for consideration. Upon approval by City Council, the CDBG Administration, Neighborhood Improvement Activities and Emergency Home Repair will be submitted to HUD as part of the Annual Action Plan 2018-19.

Background

CDBG administration, neighborhood commercial improvements and emergency home repair activities are carried out by city departments. These projects address the neighborhood infrastructure improvement and economic development needs identified in the city's Consolidated Plan. CDBG administration, neighborhood improvements and economic development will be used to implement projects that will improve the safety and quality of life of the residents living within the Original Town Site of Surprise. Although the Consolidated Plan lists Neighborhood Improvements as a priority, the city wanted to specifically list right of way, streetscape improvements and possible commercial property/building improvements/demolition to the Activities as the project funding priorities considered today.

According to HUD regulations, CDBG funds may be used to provide Neighborhood Improvements (including labor, supplies, materials, project management and other costs), provided the service will:

- Serve low to moderate income persons in the City of Surprise through area benefit or serving a particular clientele like seniors, youth and families.
- Increase commercial space and/or improvement availability within the Surprise Heritage District.

Funding Limit

CDBG administration, neighborhood improvement related funding is limited to 85% of the annual CDBG allocation for the program year (PY). For example, the CDBG allocation for City of Surprise for the PY 2017-18 was \$638,560. The funding made available for such projects was approx. \$542,776. Funding from HUD for PY 2017-18 is approximately \$638,560. Recommendation today will be based on anticipated allocation amount of \$638,560 in which a maximum of 15% can be allocated to Public Services in the amount of \$95,784 and 20% allocated to Administration. Therefore the Commission is making project recommendations on an amount of **\$542,776**.

Previous Actions

Past Administration, Rehabilitation and Public Improvements funding levels have been as follows:

2015

- Administration set aside was \$110,262 to cover city salaries
- Street Improvement Project was awarded \$143,998 for improvements to streets in the OTS
- Senior Center Parking Lot was awarded \$50,000 for lot improvements
- OTS Water Feasibility Study was awarded \$164,353

2016

- Administration set aside was \$117,028 to cover city salaries and grant implementation expenses
- Neighborhood Improvement Project – TechCelerator was awarded \$380,341 for improvements to city owned facility in the Surprise Heritage District.

2017

- Administration set aside was \$127,712 to cover city salaries and grant implementation expenses
- Neighborhood Improvement Project – TechCelerator Phase 2 \$184,653 for improvements to city owned business incubator facility in the Surprise Heritage District.
- Senior Center Improvements – \$20,000 for improvements to include but not limited to refrigerator and stove replacement, and internet / communications / security system upgrade / improvement.
- Business Development Grants Project awarded \$60,000 for business development and retention. The minimum amount to be granted per applicant is \$1,000 with a maximum award of \$20,000.
- Emergency Housing Repair Project – \$150,411 to provide 15 emergency repair projects to owner-occupied residences who meet income guideline of 80% or below of median income

Year 4

- Public Service
- Affordable Housing
- Emergency Home Repair
- Neighborhood Improvements

Year 5

- Water System Improvements
- OTS Lighting
- Public Service
- Affordable Housing

Updated Actions

Staff's funding recommendations are as follows:

Administration	\$127,712
-----------------------	------------------

Salaries, supplies, compliance needs

Neighborhood Improvement Projects	\$265,064
--	------------------

Infrastructure, right of way and streetscape improvements and possible commercial property /building improvements within the Surprise Heritage District

Emergency Home Repair	\$150,000
------------------------------	------------------

Provide up to 15 grants to address health and safety issues

Public Service Set-Aside (15%)	\$95,784
---------------------------------------	-----------------

Total CDBG Anticipated Funding	<u>\$638,560</u>
---------------------------------------	-------------------------

Future Actions

- City Council Workshop: 4/3/18
- City Council Public Hearing and approval : 4/17/18
- Submission to HUD as part of Annual Action Plan 2018-19 by May 15, 2018

Recommendations

Approval of administration, commercial property / building improvements and emergency home repair activities within the Surprise Heritage District as funding priorities for the Community Development Block Grant Annual Action Plan for 2018-2019.

CITY OF SURPRISE, ARIZONA
Draft
ANNUAL ACTION PLAN 2018-19
MAY 2018



Fourth Program Year Action Plan

This Fourth Annual Action Plan (FAAP 2018-2019) includes the [SF 424](#) and Narrative Responses to Action Plan questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations.

ON REQUEST THIS DOCUMENT CAN BE MADE AVAILABLE IN ALTERNATE FORMATS



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Narrative Responses

AP-05 Executive Summary-91.200(c), 91.220 (b)

1. *Introduction*

The Fourth Year Annual Action Plan 2018-19 (AAP4 2018-19) implements the fourth year of activities that will address goals established in the City of Surprise Consolidated Plan 2015-19. The major focus of this AAP4 2018-19 concentrates on creating suitable living environments and providing neighborhood improvement opportunities. The Fourth Year AAP 2018-2019 complies with regulations set by the U.S. Department of Housing and Urban Development (HUD). HUD requires entitlement communities, such as the City of Surprise, to consolidate its planning, application and reporting requirements for HUD programs, including the Community Development Block Grant (CDBG) and the HOME Investment Partnership Grant programs. An Annual Action Plan is prepared each year and is presented to the City of Surprise Planning and Zoning Commission and the Surprise City Council.

The needs of low-income seniors, low-income youth, people in poverty and the community's aging neighborhoods and public infrastructure continue. The Fourth Year AAP 2018-19 will focus on the allocation of CDBG and HOME funds for these services including housing and neighborhood improvement opportunities in order to attract new businesses and business retention. The term of this plan is from July 1, 2018, through June 30, 2019.

To the extent feasible, the narrative for this Annual Plan will attempt to not duplicate the narrative for the Consolidated Plan. However, the outlines for the five-year plan and the annual action plan are very similar, so some repetition is unavoidable. Programs and activities described in this plan are intended to primarily benefit low and moderate income residents of City of Surprise, neighborhoods with high concentrations of low and moderate income residents, and the city as a whole. The City of Surprise CDBG program has been allocated \$638,560 in funding for program year (PY) 2018-2019.

2. *Summarize the objectives and outcomes identified in the Plan*

This could be a restatement of items or a table listed elsewhere in the plan or a reference to another location. It may also contain any essential items from the housing and homeless needs assessment, the housing market analysis or the strategic plan.

This Fourth Year AAP 2018-2019 identifies the year four activities that will address goals established in the City of Surprise Consolidated Plan 2015-19. Consistent with the established objectives, CDBG funds will be used in the following way:

- Fifteen percent (\$95,784) of the CDBG allotted funds (\$638,560) will be utilized for public service activities through City of Surprise departments or nonprofit organizations
- Twenty percent (\$127,712) will be used for grant administrative expenses, and
- \$415,064 will be utilized for Neighborhood Improvements and Emergency Home Repairs projects. This is in accordance to the regulations set by HUD

3. *Evaluation of past performance*

This is an evaluation of past performance that helped lead the grantee to choose its goals or projects.

The City of Surprise evaluates its past performance every year as part of the Consolidated Annual Performance and Evaluation Report (CAPER) as required by HUD. The CAPER provided an estimate of output measures in compliance with HUD's data system. The CAPER includes measures of performance to quantify longer-term goals by incorporating projected outcome measures. Quantifiable results-oriented goals for capital programs are tied to a unified framework for the benefit of low- and moderate-income residents.

- Preserve neighborhoods through infrastructure improvements in the targeted low-income area(s)
- Provide public service activities to city's youth, seniors, special needs persons, veterans, persons and families in crisis, and disabled persons through nonprofit agencies or other city departments
- Preserve neighborhoods through housing rehabilitation assistance to qualified homeowners
- Preserve habitability of owner-occupied housing through emergency home repair assistance
- Preserve affordability of quality rental housing through the Housing Choice Voucher program

**4. Summary of Citizen Participation Process and consultation process.
Summary from citizen participation section of plan.**

The City of Surprise recognizes the importance of citizen participation in the development and implementation of any plan or program. The Fourth Year AAP 2018-2019 was discussed at two separate meetings; the City Council workshop April 3, 2018 and a public hearing April 17, 2018.

The Planning and Zoning Commission held a public meeting February 15, 2018 discussing the Fourth Annual Action Plan Public Service Funding 2018-2019 and a second meeting held March 1, 2018 to discuss year four Annual Action Plan priorities.

These meetings are open to the public in order to encourage individuals and organizations to facilitate a public discussion and provide a means whereby, the public can actively participate in the planning and development of the city's CDBG Program. Citizens were encouraged to submit new project proposals and comments on past and proposed CDBG programs and projects. All dates and times for Commission public meetings were published on the city's website and in the Daily News-Sun local newspaper. The proposed projects and budgets selected by the City Council for CDBG funding were published in the local newspaper for citizen review along with meeting time information.

5. This could be a brief narrative summary or reference an attached document from the Citizen Participation section of the Con Plan.

The City of Surprise provided its residents many opportunities to provide input on the decision making process.

Table 1: Public Input Timeline

Time	Activity
March 1, 2018	Planning and Zoning Commission Meeting on Annual Action Plan 4 Priorities and Public Hearing
March 5-April 5, 2018	30 day comment period on Annual Action Plan and Consolidated Plan
April 3, 2018	City Council Workshop
April 17, 2018	City Council Public Hearing and action
May 15, 2018	Submission to HUD

6. *Summary of comments or views not accepted and the reasons for not accepting them.*

Public comment period runs from March 5, 2018 to April 5, 2018.

7. *Summary*

The Fourth Year AAP 2018-2019 represents the vision and goals for the neighborhood infrastructure improvements, community and economic development needs and housing activities and the available resources and a strategic plan for meeting those needs. The Fourth Year AAP 2018-2019 also identifies any funds to be used as a leverage to address goals and priorities in the plan through partnerships with local non-profit organizations.

PR-05 Lead & Responsible Agencies - 91.200(b)

1. ***Agency/entity responsible for preparing/administering the Consolidated Plan. The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.***

Table 2. Agency Information

Agency Role	Name	Department/Agency
CDBG Administrator	SURPRISE	Human Service and Community Vitality

Narrative

The lead agency for preparing the FY2018-2019 Annual Action Plan Year 4 was the City of Surprise Human Service and Community Vitality Department – Neighborhood Services Division (NSD). The Department is responsible for the administration of the Community Development Block Grant (CDBG), HOME Investment Partnership Program (HOME), and the Neighborhood Stabilization Program (NSP) grant programs.

Consolidated Plan Public Contact Information

Alicia Rubio, Neighborhood Services Coordinator
 Human Service and Community Vitality
 16000 N. Civic Center Plaza
 Surprise, AZ 85374
 623-222-3240
alicia.rubio@surpriseaz.gov

AP-10 Consultation - 91.100, 91.200(b), 91.215(I)

1. *Introduction*

The City of Surprise is committed to obtaining input from citizens, city staff, non-profit agencies, non-profit developers, private developers, governmental agencies, and the Regional Continuum of Care as part of the Consolidated and Annual Action Plan processes. The 2018 Fourth Year AAP consultation included a combination of public meetings with community stakeholders, two community input hearings, newspaper advertisements, website announcements and placement of hard copies of the plan at two libraries, the local senior center and city hall to solicit comments on the draft Annual Action Plan. Citizen participation was strongly encouraged throughout the processes of short and long range departmental planning, plan implementation, and assessment of plan effectiveness.

Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(I)).

As members of the Maricopa HOME Consortium, the City of Surprise regularly coordinates with private industry, businesses and developers to foster the production of affordable housing and projects for special needs/homeless populations. The consortium also works closely with the real estate, construction and finance industries to implement other ongoing HOME and CDBG supported housing rehabilitation and production activities. The consortium may pursue the receipt of Low Income Housing Tax Credit (LIHTC) resources and associated private mortgage financing support for construction and permanent loans, as well as tax-exempt bond financing where bonds are purchased by both institutional and retail investors. Surprise also allocates 15% of its CDBG allocation for public services.

Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness.

As members of the Maricopa HOME Consortium we are committed to addressing the needs of homeless persons and persons at risk of experiencing homelessness. We participate in a regional Continuum of Care plan in collaboration with the all other jurisdictions in Maricopa County. The Maricopa Association of Governments (MAG) plans and administers the Continuum of Care. Jurisdictions work together with the U.S. Department of Housing and Urban Development in support of programming that assists the county homeless and at risk population. The city participates annually in the Point in Time Count.

Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards for and evaluate outcomes of projects and activities assisted by ESG funds, and develop funding, policies and procedures for the operation and administration of HMIS

As an active member of the Maricopa County HOME Consortium we regularly consult with Maricopa Association of Governments (MAG), the lead agency for the Maricopa Regional Continuum of Care structure. Through consultation efforts with MAG and the Continuum of Care we align our priorities of the County's homeless strategies with Continuum-wide priorities for homelessness. The Maricopa HOME Consortium continues to actively participate in the Continuum of Care and contribute by determining its priorities for homeless persons and those at risk of experiencing homelessness

2. *Agencies, groups, organizations and others who participated in the process and consultations*

Table 3 – Agencies, groups, organizations who participated

1	Agency/Group/Organization	Housing Authority of Maricopa County
	Agency/Group/Organization Type	Housing
	What section of the Plan was addressed by Consultation?	Public Housing Needs
	Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	The Housing Authority of Maricopa County (HAMC) administers the public housing and Section 8 subsidized housing program within the City of Surprise. Surprise housing activities are planned and reported through the Maricopa Consortium Plan
2	Agency/Group/Organization	CENTRAL ARIZONA SHELTER SERVICES
	Agency/Group/Organization Type	Services-homeless
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Strategy
	Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	The city enters into a sub recipient agreement through the CDBG public service set aside. The agency has been awarded funding for Program Years 2014-2017. The agency has been recommended funding for this program year

3	Agency/Group/Organization	SURPRISE
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Victims of Domestic Violence Services-Health Services-Education Services-Employment Regional organization Grantee Department
	What section of the Plan was addressed by Consultation?	Homeless Needs - Families with children Anti-poverty Strategy Public Services
	Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	Surprise Resource Center is a division within the Human Service and Community Vitality Department. The Resource Center staff provided data to support the need of public services and the lack thereof. The Center offers a variety of services including veteran employment services, job training, veteran job club, domestic violence and support groups & counseling, health education, WIC nutrition program and enrollment services for health insurance programs. The Resource Center also offers financial fitness workshops, credit counseling workshops and tax preparation at no cost to poverty level families and seniors
4	Agency/Group/Organization	Maricopa County – Arizona@Work
	Agency/Group/Organization Type	Services-Employment
	What section of the Plan was addressed by Consultation?	Economic Development Anti-poverty Strategy
	Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?	Surprise entered into partnership with Maricopa County "Arizona@Work" program. The "Arizona@Work" program provided employment workshops and career fairs to Surprise residents

Identify any Agency Types not consulted and provide rationale for not consulting

N/A

Other local/regional/state/federal planning efforts considered when preparing the Plan

Table 4 - Other local / regional / federal planning efforts

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Continuum of Care	Maricopa Association of Governments	The city's needs and activities are planned and reported through the Maricopa Consortium Plan. See the Consolidated Plan for the Maricopa HOME Consortium for a complete description of these activities
City of Surprise Community Policing	Surprise Police Department	The police department in coordination with the Human Service and Community Vitality Department has taken the lead for the homeless point in time count for the last four years. They have helped to identify chronically homeless individuals and locations of abandoned properties where known homeless tend to seek shelter

Narrative

The Maricopa Association of Governments Continuum of Care Subcommittee (MAG Continuum of Care) is the regional body that manages the collaborative efforts of communities and agencies in Maricopa County to plan for the needs of the homeless and access federal funding on behalf of agencies organized to address those needs. The 'Unsheltered Point in Time Count' led by MAG CoC in January 2018 reported that there are 39 homeless persons in the city which represents a 43% increase over the previous year's data. The city will do a periodic assessment of any new homeless person cases in the city and will act accordingly to mitigate the problem by assisting with resource referrals.

All communities participate in the unsheltered homeless count conducted during the last week of January. Numbers for all communities with the exception of Phoenix are a direct census of individuals interviewed by volunteers, law enforcement, and outreach workers. The City of Phoenix conducts a survey using an extrapolation method by which areas are designated "high density" or "low density" areas. Direct counts in those areas are then extrapolated to estimate the number of individuals experiencing homelessness in unsheltered situations within the City of Phoenix geographic boundaries.

Table 5. Unsheltered Street County by Municipality (2013-2017)

Municipality	2017	2016	2015	2014	2013
Surprise	16	6	7	0	0

Source: 2013-2017 POINT IN TIME COUNT | Maricopa Regional Continuum of Care

AP-12 Participation - 91.401, 91.105, 91.200(c)

- 1. Summary of citizen participation process/efforts made to broaden citizen participation. Summarize citizen participation process and how it impacted goal-setting.**

The City of Surprise is committed to obtaining input from citizens, staff, non-profit agencies, non-profit developers and other government agencies. The AAP4 citizen participation included a combination of meetings, three public meetings with hearings to solicit comments on the draft plan, which included a 30 day review period. The draft plan was placed at four central locations (2 libraries, senior center and city hall). The FAAP draft was also placed on the city website during the 30 day comment period.

Table 6. Citizen Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/ attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
1	Public Hearing	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities Non-targeted/broad community Residents of Public and Assisted Housing	3 public meetings with hearings were held on 3/1/18, 4/3/18, and 4/17/18 to further solicit input	No public comments were submitted at public hearings	N/A	
2	Newspaper Ad	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities	Public notices announcing the public hearings and the draft SAAP were placed in 2 newspapers of record in the City of Surprise. (Daily News-Sun and Surprise Today)	No comments received yet	N/A	

3	Internet Outreach	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities Non-targeted/broad community Residents of Public and Assisted Housing	Draft fourth Year AAP was made available on the city's internet site for a 30 day public comment period from 3/5-4/5/18	No comments received as of yet	N/A	http://www.surpriseaz.gov/2475/Consolidated-Plan
4	Public viewing	Minorities Non-English Speaking - Specify other language: Spanish Persons with disabilities Non-targeted/broad community Residents of Public and Assisted Housing	Draft hard copies were placed in a central, public location for public viewing. Locations included city hall, 2 libraries and the Senior Center	No comments received	N/A	

AP-15 Expected Resources - 91.420(b), 91.220(c)(1,2)

Introduction

Anticipated resources available includes cash match in the amount of approximately \$415,908 for the HOME program match requirement. Also any anticipated program income will be used towards CDBG eligible projects.

Table 7 - Expected Resources – Priority Table

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	638,560	20,000	0	658,560	0	Estimated allocation of \$638,560. Prior year rollover of approximately \$957,839.50

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

No matching funds are required for the CDBG program, however the city will leverage with staff time and the technical oversight provided in the form of project management. There is cash match available for the HOME program in the amount of approximately \$415,908 which is utilized as leverage. The Program Year 2018-2019 HOME Allocation is estimated to be \$145,126 based on previous year's allocation. The City of Surprise is a member of the Maricopa County HOME Consortium which administers the HOME grant funds and acts as a pass-through agency.

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

The City of Surprise owns the public right of way to include streets, sidewalks, parks and public facilities such as the Surprise Senior Center and the Surprise Resource Center within the Surprise Heritage District.

Discussion

The primary objective of the City of Surprise CDBG program is to foster the development, revitalization and preservation of neighborhoods to provide decent housing, a suitable living environment and neighborhood improvement opportunities. Surprise' commitment to Neighborhood Improvements are part of the city's overall Capital Improvement Plan managed out of the Engineering Department. The city recognizes the importance and impact of utilizing cash match and any program income as a leverage to eligible projects within the Surprise Heritage District. Surprise is further committed to revitalization efforts by transferring Neighborhood Stabilization Program Income into the CDBG program. These funds will be utilized for neighborhood improvements and housing opportunities.

AP-20 Annual Goals and Objectives - 91.420, 91.220(c)(3)&(e)

Table 8 – Goals Summary

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Program Administration	2015	2019		Original Town site		CDBG: \$127,712	Homeowner Housing Rehabilitated: 12 Household Housing Unit
2	Public Services	2015	2019	Public Service	Original Town site	Public Services	CDBG: \$95,784	Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted
3	Neighborhood Infrastructure Improvements	2016	2019	Neighborhood Infrastructure	Original Town site	Neighborhood Improvements	CDBG: \$265,064	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 10 Persons Assisted Businesses assisted: 4 Businesses Assisted
4	Emergency Housing Rehabilitation	2015	2016	Affordable Housing	Original Town site	Owner Occupied Housing Rehabilitation	CDBG: \$150,000	Homeowner Housing Rehabilitated: 15 Household Housing Unit

Table 9 - Goal Descriptions

1	Goal Name	Program Administration
	Goal Description	20% of annual allocation of \$638,560 is to be set aside for administration duties to carry forth the CDBG program
2	Goal Name	Public Services
	Goal Description	15% of Surprise annual allocation of \$638,560 will be allocated to public service activities through nonprofits agencies who serve those with special needs
3	Goal Name	Neighborhood Infrastructure Improvements
	Goal Description	Neighborhood Improvements will include right of way improvements and/or park amenities. This project will create an area benefit by creating safe, healthy and decent neighborhoods within the Original Town site of Surprise, a CDBG area-benefit eligible neighborhood
4	Goal Name	Emergency Housing Rehabilitation
	Goal Description	The Emergency Housing Repair Project will provide 15 emergency repair grants to address health and safety issues to owner-occupied homes who meet the income guideline of 80% or below median income within the Surprise Heritage District

AP-35 Projects - 91.420, 91.220(d)

Introduction

This section specifically identifies the projects that will take place during FY 2016-2017 with CDBG and HOME funding to address the priority needs and specific objectives as identified in the Consolidated Plan Strategic Plan section.

- **CDBG Funds:** FY 2018-2019 CDBG Allocation is **\$638,560**
- **HOME Funds:** FY 2018-2019 HOME Allocation is **\$145,126**

Any program income received during the program year will be retained and reported by the City of Surprise and used on CDBG and HOME eligible activities.

Table 10 – Project Information

#	Project Name
1	Neighborhood Improvements
2	2018 Public Services
3	CDBG Administration
4	HOME Housing Rehabilitation
5	2018-2019 Emergency Home Repair

For additional project information, please see Table 11 on the next page.

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

The Surprise Heritage District area targeted for HOME/CDBG investment is the lowest income Census Tract in the City of Surprise. Neighborhood improvements will occur in this targeted area.

AP-38 Project Summary

Table 11. Project Details

1	Project Name	Neighborhood Improvements
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Neighborhood Infrastructure Improvements
	Needs Addressed	Neighborhood Improvements
	Funding	CDBG: \$265,064
	Description	Improvements within the Surprise Heritage District
	Target Date	6/28/2019
	Estimate the number and type of families that will benefit from the proposed activities	Approximately 20 families will benefit from neighborhood improvements
	Location Description	The Surprise Heritage District located with the Original Town site
	Planned Activities	Neighborhood improvements, right of way improvements, commercial demolition
2	Project Name	2018 Public Services
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Public Services
	Needs Addressed	Public Services
	Funding	CDBG: \$95,784
	Description	Public service activities through nonprofit agencies
	Target Date	11/29/2019
	Estimate the number and type of families that will benefit from the proposed activities	TBD
	Location Description	Throughout Surprise
	Planned Activities	Provide public service benefits to youth, seniors, veterans, homeless and special needs population
3	Project Name	CDBG Administration
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Program Administration
	Needs Addressed	Administration
	Funding	CDBG: \$127,712
	Description	20% of annual allocation set aside for CDBG program administrative duties
	Target Date	7/2018



	Estimate the number and type of families that will benefit from the proposed activities	N/A
	Location Description	N/A
	Planned Activities	Administrative duties administered for the CDBG program
4	Project Name	HOME Housing Rehabilitation
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Neighborhood Infrastructure Improvements
	Needs Addressed	Neighborhood Improvements Owner Occupied Housing Rehabilitation
	Funding	HOME: \$145,156
	Description	Provide substantial rehabilitation for low to moderate income residents
	Target Date	7/2018
	Estimate the number and type of families that will benefit from the proposed activities	5 families will benefit from the housing rehabilitation
	Location Description	Throughout Surprise
	Planned Activities	Substantial rehabilitation up to \$25,000. If home is over 50 years old the city can invest up to \$35,000. The CDBG Emergency Home Repair program can provide up to \$10,000 in grant funding
5	Project Name	2018-2019 Emergency Home Repair
	Target Area	ORIGINAL TOWNSITE
	Goals Supported	Emergency Housing Rehabilitation
	Needs Addressed	Owner Occupied Housing Rehabilitation
	Funding	CDBG: \$150,000
	Description	Provide emergency repair assistance to 15 families who meet income guidelines
	Target Date	7/2018
	Estimate the number and type of families that will benefit from the proposed activities	15 families will be assisted
	Location Description	Throughout the City of Surprise
	Planned Activities	Provide emergency home repair in order to correct health and safety issues for low to moderate income residents



AP-50 Geographic Distribution - 91.420, 91.220(f)

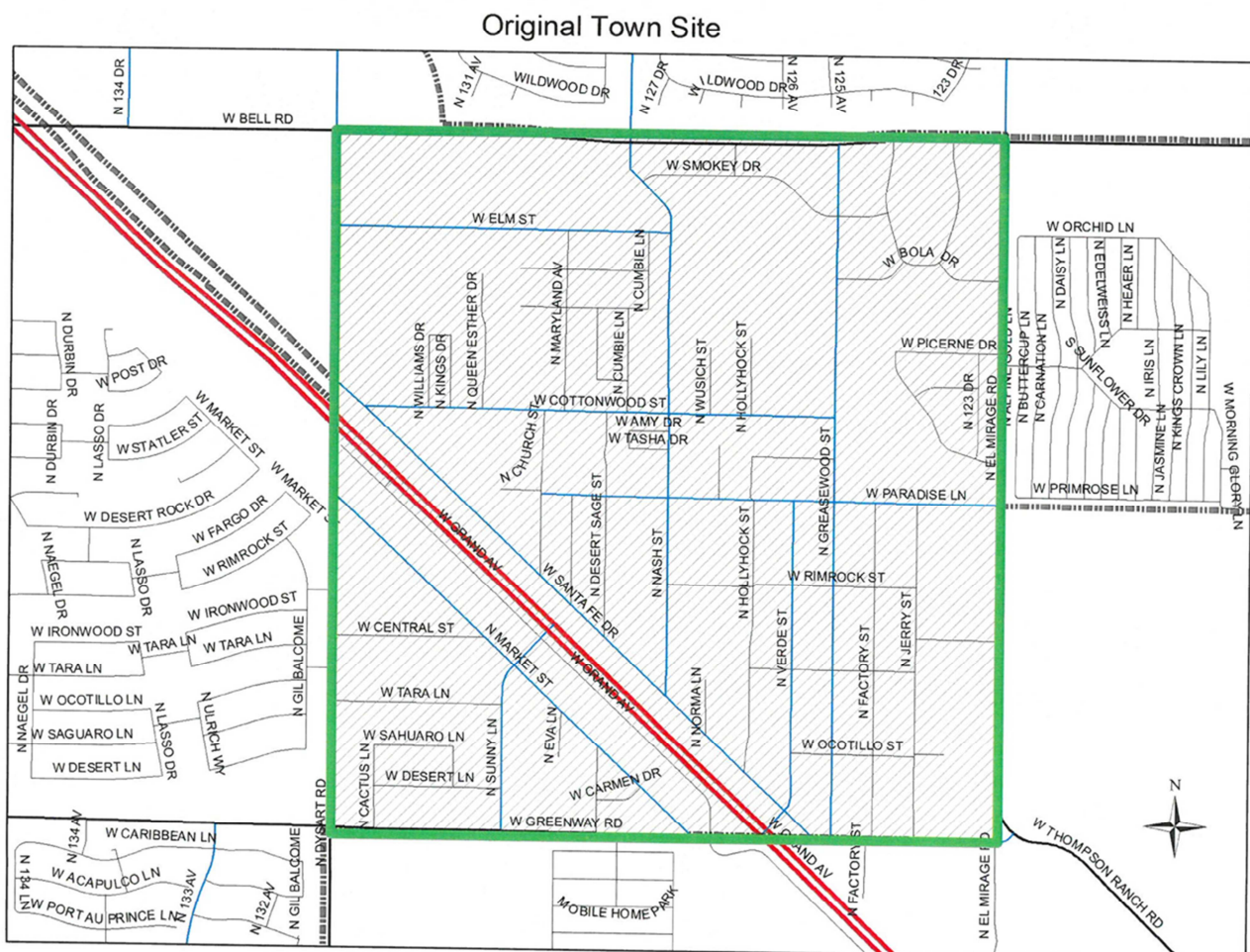
Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

Surprise has one area of minority concentration. According to the U.S. Census Bureau, the total population in the Surprise Heritage District is 5,535. 80% or 4,426 are of Hispanic origin. This census tract includes the entire Original Town site and is the only area where a majority of the residents are low and moderate income.

Geographic Distribution

Table 12 - Geographic Distribution

Target Area	Percentage of Funds
ORIGINAL TOWNSITE	100



Appendix 2a.: Surprise Heritage District (Original Town Site)

Rationale for the priorities for allocating investments geographically

All area benefit activities included in the 5 Year Strategic Plan will take place in the Original Town Site aka Surprise Heritage District area. The city has a Council appointed resident group - the Planning and Zoning Commission, which monitor the implementation of the Specific Plan for the Revitalization of the Surprise Heritage District. Resources recommended by this commission include CDBG funds and general funds used for the revitalization of the Surprise Heritage District.

Discussion

Although the City of Surprise Heritage District has had higher concentration of low to moderate income residents, our services are income based therefore eligibility can be city wide as long as the income limits are met.

AP-75 Barriers to affordable housing -91.420, 91.220(j)

Introduction

Barriers to affordable housing have been identified through the Maricopa HOME Consortium and the City of Surprise. Plans to take to remove or ameliorate the negative effects of public policies will be to affirmatively market fair housing and overcome identified barriers to affordable housing. These efforts in collaboration with the Consortium have resulted in the creation of a Fair Housing Plan. The plan includes development of specific goals and objectives to overcome barriers to affordable housing. The Consortium is in the process of updating the Maricopa County Regional Analysis of Impediments to Fair Housing Choice through consultants further documenting impediments to fair housing choices including lack of accessible housing and housing discrimination against persons with disabilities, lack of awareness of fair housing laws, the cost of affordable housing limiting housing choice, poor financial history of potential homebuyers, lack of transportation options in rural unincorporated Maricopa County, and distribution of resources.

Actions planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment.

During the PY 2018-19, the following actions will contribute to the removal of barriers to affordable housing:

1. Surprise will dedicate resources to preservation and development. Surprise has newly created a specific zoning district to further delineate specific zoning districts in the original town site (OTS) to enhance preservation and development. This district is known as the "Surprise Heritage District" (SHD). The intent of this district is to enhance and protect the historic character of the area. Two overlay districts, "residential

neighborhood overlay” and the “art & entertainment district” is to support the residents to preserve and protect their neighborhood and to promote the local arts and culture business opportunities.

2. The city’s allocation of HOME funds to major rehabilitation. Surprise also utilizes general funds on HOME eligible rehabilitation projects to match HOME expenditures for housing rehabilitation. The city maintains a match log and match is applied at the time of requests for reimbursement from Maricopa County Community Development.

3. City general revenues for beautification. Pride Day activities generally happen twice annually and are paid for with General Funds.

4. Program Income from the Neighborhood Stabilization Program (NSP) funding has been reprogrammed into the CDBG program. This will assist in neighborhood improvements, potential tax credit projects within the Surprise Heritage District and program administration for community development and revitalization efforts located within the Surprise Heritage District-Original Town Site.

Discussion

In furthering the discussion of actions that will be undertaken to remove the barriers of affordable housing, city council adopted the Surprise Heritage District (zoning overlay) in June 2016. This district will allow the flexibility of the type of structures allowed in the new zoning districts to include cottage industries, which allow small individual owned business in a residential area and permit manufactured homes within the neighborhood as another option for diversified housing opportunities in the target area. The adoption of the "SHD" will also offer development incentives such as reduction in setback requirements and 100% waiver of development impact fees. This action will further support Surprise's intent to ameliorate public policies which are barriers to affordable housing.

AP-85 Other Actions - 91.420, 91.220(k)

Introduction

The primary categories of needs to be addressed in the plan are neighborhood improvements to include economic development, public services to eligible populations and emergency housing rehabilitation.

Actions planned to address obstacles to meeting underserved needs

One of the main obstacles to meeting community needs is inadequate resources for programs. The decline in resources across sectors, including government agencies and foundations, due to high demand has negatively impacted the quantity and quality of housing and community development services. Although federal stimulus funding helped mitigate this trend to some extent, resources for these programs are limited.

The City of Surprise has partnered with various social service agencies which are housed at the Surprise Resource Center located in the Surprise Heritage District. The services offered are veteran employment services, veteran job training club, employment workshops, career fairs, services for domestic violence and sexual abuse, Women, Infant and Children (W.I.C) nutrition program, enrollment services for health insurance, programs, access to food and nutrition resource (SNAP, TANF, AHCCCS) and navigation of the Affordable Care Act. The Resource Center also offers financial fitness workshops, tax preparation to poverty level families and credit counseling workshops.

Actions planned to foster and maintain affordable housing

The City of Surprise has an active strategy to promote homeownership and the preservation and management of existing residential property. To offset the increasing cost of housing in the private market, the city has undertaken a number of strategies to preserve and develop new affordable housing. These strategies include:

1. The use of general funds and HOME funds for the preservation of existing affordable owner-occupied housing.
2. Support of for-profit and nonprofit developers in the construction of Tax Credit assisted rental housing for families and seniors.
3. Development of Original Town Site (also known as the Surprise Heritage District) Revitalization Plan which has already resulted in public investment in community facilities, infill construction of mixed income owner-occupied homes and specific zoning districts.

Housing units assisted under any and all programs covered under this Consolidated Plan are inspected and/or tested prior to assistance as follows:

- a. The Housing Authority of Maricopa County inspects all rental units prior to occupancy by households who have Housing Choice Vouchers. For units built before 1978, chipped or peeling paint must be removed prior to occupancy.
- b. For units built before 1978, chipped or peeling paint must be removed prior to occupancy. Renter and owner-occupied units built before 1978 that are being rehabilitated with CDBG or HOME funds must be professionally assessed and abated as part of the assistance contract.
- c. Lead-based paint is not allowed or sold for residential construction after 1978. Newly constructed single-family or multifamily residences assisted with funding from the covered grants will be free of lead paint hazards.

Actions planned to reduce the number of poverty-level families

The Housing Authority of Maricopa County (HAMC) has two public housing developments in Surprise and administers Housing Choice Vouchers in the private rental market. The operations of HAMC in Surprise have not been formalized since Surprise incorporated as a city and an intergovernmental agreement would be beneficial.

The City of Surprise has partnered with various social service agencies which are housed at the Resource Center located in Surprise Heritage District. The services offered are veteran employment services, veteran job training club, services for domestic violence and sexual abuse, Women, Infant and children (W.I.C) nutrition program, enrollment services for health insurance, programs, access to food and nutrition resource (SNAP, TANF, AHCCCS and navigation of the Affordable Care Act. The Resource Center also offers financial fitness workshops, tax preparation to poverty level families and credit counseling workshops.

Actions planned to develop institutional structure

The City of Surprise is the clearinghouse and facilitator for the activities as described by the Consolidated Plan. The Neighborhood Services Division of the Human Service and Community Vitality Development Department oversees the administration of all CDBG and HOME entitlement programs. The department is responsible for:

- Program management and oversight.
- Program evaluation
- Consolidated Plan preparation, monitoring and evaluation
Required reporting to HUD

Divisions within the Human Service and Community Vitality Department include the Resource Center which provides a one-stop-shop for social services. (see above action plan to reduce number of poverty-level families) Other departments and private agencies that participate in the implementation of federal, state and county-funded grants include:

- City Council - formal approving body for policy making and release of funds.

- The Public Works Department - has experience in administering the procurement and Labor Standards requirements of federally funded projects.
- Financial management will be appropriately separated between the Finance Department and Human Service and Community Vitality Department

Actions planned to enhance coordination between public and private housing and social service agencies

The City of Surprise has partnered with various social service agencies which are housed at the Resource Center located in the Surprise Heritage District. The services offered are veteran employment services, veteran job training club, services for domestic violence and sexual abuse, Women, Infant and children (W.I.C) nutrition program, enrollment services for health insurance, programs, access to food and nutrition resource (SNAP, TANF, AHCCCS and navigation of the Affordable Care Act. The Resource Center also offers financial fitness workshops, tax preparation to poverty level families and seniors and credit counseling workshops.

The city is also carrying out public service activities under the CDBG program through an open application process. The city utilizes CDBG and HOME funds for emergency home repair and owner-occupied housing rehabilitation. The city is undertaking discussions at senior management level with Maricopa County and other public private entities in order to create more affordable housing units within the Surprise Heritage District.

Discussion

The city is committed to preserving neighborhoods through neighborhood improvements in the target area. The commitment is evident is the amount of funds allocated to projects located within the Surprise.

AP-90 Program Specific Requirements - 91.420, 91.220(I)(1,2,4)

Introduction

At the beginning of Program Year 2018-2019 we do not anticipate any program income, however we will budget approximately \$20,000.

Community Development Block Grant Program (CDBG) Reference 24 CFR 91.220(I)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	20,000
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan.	0
3. The amount of surplus funds from urban renewal settlements	0
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan	0
5. The amount of income from float-funded activities	0
Total Program Income:	20,000

Other CDBG Requirements

1. The amount of urgent need activities	0
2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income. Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	100.00%

Discussion

Due to program requirements, we foresee 100% of CDBG funds being used for extremely low to moderate income residents. All activities are deemed eligible for funding and have met environmental clearance in the projects requiring said clearance.

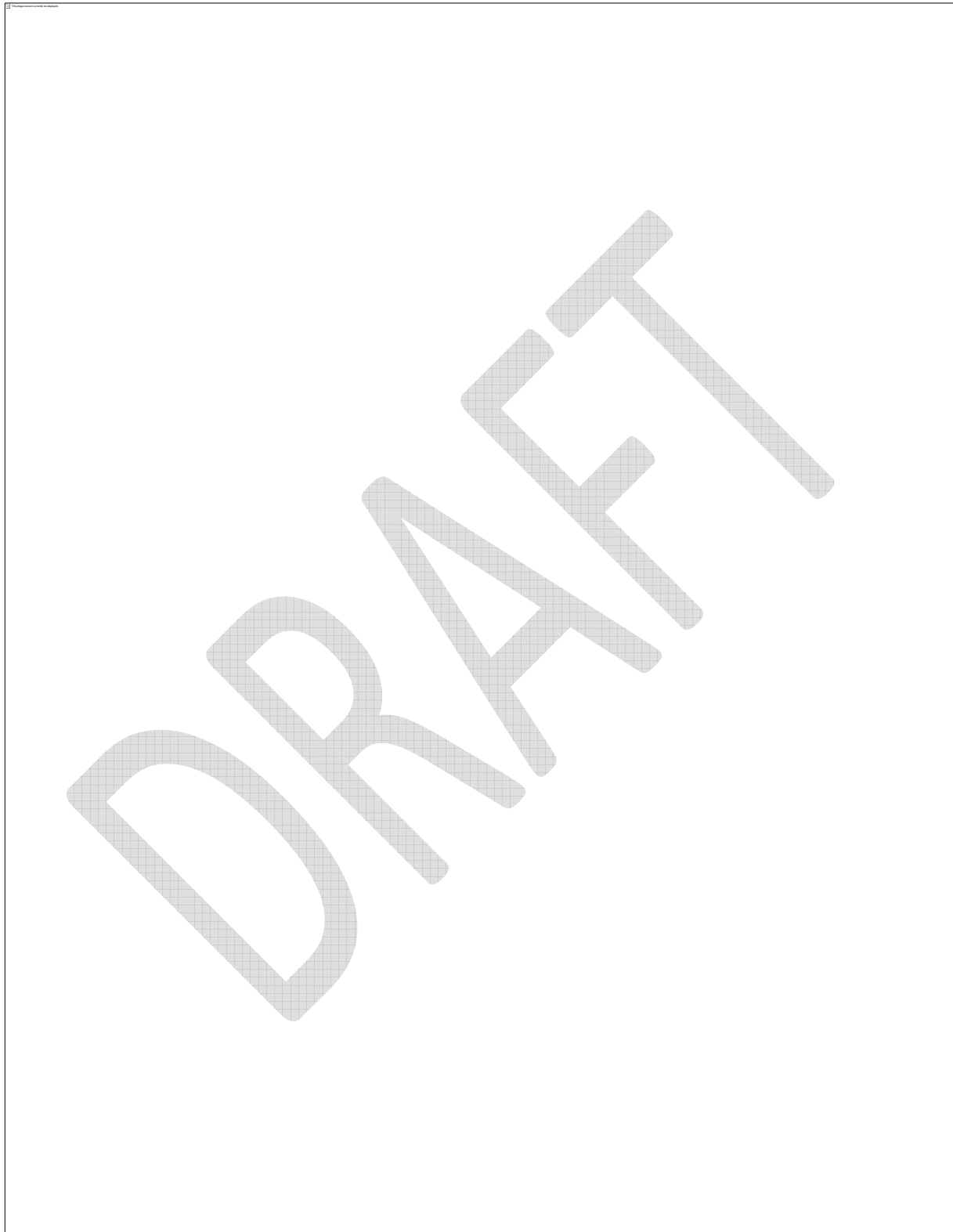
APPENDIX 1 – Public Notice

DRAFT

APPENDIX 1 - PUBLIC NOTICE - CONT

DRAFT

APPENDIX 2 – Surprise City Limits





Annual Action Plan

Human Service & Community Vitality | March 1, 2018



Today's Objectives

- CDBG Funding Priorities
 - Public Service Funding Priorities
 - Annual Action Plan Funding Recommendations
- 



CDBG Background

Direct Entitlement Community

Yearly Funding Through CDBG program

- Received \$638,560 for 2017-2018
- Anticipate Approx. \$638,560 for 2018-2019

15% of Allotment for Public Services

- Maximum of \$95,784 available

AAP Beneficiary Requirements

National Objectives Surprise Will Meet

- Benefit Low to Moderate Income Persons
- Area Benefit
- Limited Clientele





Funding Beneficiaries

Area Benefit

- 51% Residents in the area must be Low/Mod Income
- Activities Targeted only for Surprise Heritage District

Limited Clientele

- Youth/Seniors/Homeless Persons
 - 51% Of Low/Mod Income Persons
- 

Annual Action Plan

Components

Adopted
Consolidated Plan 2015-19



Strategic Plan
(5 Years)



Priorities and Needs

Annual Action Plan
2018-19 (1 Year)



Specific Projects
Public Services Grant

The graphic features a dark grey header bar with a stylized sun icon on the left. Below the header, the timeline is presented in three columns. The background of the slide is a faded aerial photograph of a city with a prominent circular building in the foreground.

Annual Action Plan Timeline

March 2018

30 day
comment
period

April 2018

City Council
Presentation &
Approval

May 2018

Submit to
H.U.D



Annual Action Plan Projects

Annual Action Plan 2018-19 Projects

Neighborhood Infrastructure	\$265,064
Emergency Home Repair	\$150,000
Public Services	\$ 95,784
Administrative Allocation	\$127,712
Total -----	<u>\$638,560</u>



SURPRISE
ARIZONA

QUESTIONS OR COMMENTS?

Jason Hughes
Human Service & Community Vitality
Neighborhood Services Acting Supervisor

Alicia Rubio
Human Service & Community Vitality
Neighborhood Services Program
Coordinator

PUBLIC ENGAGEMENT FORM

PROJECT TITLE: CDBG Annual Action Plan 2018-2019 - Year 4

OVERALL PUBLIC INVOLVEMENT LEVEL:

Public Hearing on 3/1/18 (P & Z Meeting) and 4/17/18 Council Meeting. 30 day Public comment period (3/5- 4/5/18) for draft Annual Action Plan 4

IDENTIFY STAKEHOLDERS:

OTS residents/property owners, public service nonprofits, City of Surprise staff;Public Works, Community Development, Economic Development and Human Services.

OBJECTIVES:

Create viable neighborhoods, provide decent, safe and affordable housing;Low to moderate income resident job creation; provide services to those with special needs

PUBLIC ENGAGEMENT STRATEGIES & TOOLS:

Public Engagement & Project timeline:

Public outreach time frame (when to when) Public Hearings 3/1;4/17 & 3/5-4/5/18 30 day pub.comm
Future Council Work Session/Meetings target dates 4/3/18, 4/17/18
Election dates (if applicable)
Project start/completion dates 11/2018

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
Planning and Zoning Commission

March 1, 2018 @ 6:00:00 PM

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

Board Meeting Date:	March 1, 2018	Contact Person:	Eric Fitzer - Community Development
Submitting Department:	CD Boards and Commissions	District:	Internal
Staff Recommendations:	No Action		

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

Agenda Wording:

Discussion and direction pertaining to future agenda items.

Motion:

Background:

Financial Impact Statement:

No Financial Impact

ATTACHMENTS:

[Click to download](#)

No Attachments Available

External Attachment Links:

Meeting Requirements:

Powerpoint x Video x White Board x Other x

Presentation Speaker Names (spelling and titles for TV captions):