



City of Phoenix

PLANNING & DEVELOPMENT DEPARTMENT
HISTORIC PRESERVATION OFFICE

Phil Gordon Threatened Building Grant Program Application

In completing the application, please be as concise as possible, read all questions before answering to avoid repetition and write legibly in pen or type. You may include continuation sheets if needed. All required supplemental information must be included and be unbound.

I. APPLICANT COVER LETTER

Please include a cover letter from the property owner or authorized person submitting on behalf of the owner summarizing the request for grant funds. Briefly describe the overall project purpose and the eligible work items. Indicate the total project budget, dollar amount for eligible work items, the total amount requested, and the match that will be provided.

II. APPLICANT AND PROPERTY INFORMATION

Applicant: LiveFORWARD
Legal Name of Property Owner: LiveFORWARD, Benjamin Patton, Principal
Mailing Address: 1001 N. Central Avenue, Suite 202 G, Phoenix, AZ 85004
Phone: 602-481-2031 Email Address: Ben@LiveFORWARD.build
Property Address: 649 N 3rd Avenue, Phoenix, AZ 85004
Historic District (or name of individually-listed/eligible building): OLDAKER HOUSE, ROOSEVELT MRA
Current Use of Property: VACANT
Is Property Vacant? ☒ Yes ☐ No If Yes, Length of Time Vacant? 5 YEARS
Date Current Owner Purchased Property: June, 2023

Historic Preservation Office Use Only:	
Historic Status:	
<input type="checkbox"/> Individually Designated	<input type="checkbox"/> Contributor to an Historic District
<input type="checkbox"/> Eligible / Not Currently Designated	<input type="checkbox"/> Non-contributor with Potential
<input type="checkbox"/> Designation in Progress	<input type="checkbox"/> Non-contributor without Potential

III. HISTORIC PROPERTY INFORMATION

1. **Historical/Architectural Significance.** Briefly describe the historical and/or architectural significance of your property, including the date of construction, architect/builder if known, construction method, original use of property, and subsequent uses over the years.

The SEARGEANT-OLDAKER House was constructed in 1909 as a residence for Mary Elizabeth Seargeant, who would marry Emory Oldaker in 1913. Mary Elizabeth Oldaker was a prominent woman in Arizona and Phoenix in regard to history and heritage. She founded the Arizona Museum of History, and the organization First Families of Arizona. She was also an active member of the Daughters of the American Revolution. Emory Oldaker was also prominent. He was in charge of the U.S. Bureau of Animal Husbandry in Arizona and was active in the sheep industry. He shifted his career in 1991 to establish a real estate firm. They lived in the house during their careers until the 1970s. The house was rehabilitated for office use in 1986 and remained viable as an office until 2021. It has been vacant approximately two years, experiencing deterioration and minor vandalism.

The Seargeant-Oldaker House is a notably intact example of the Craftsman Bungalow style with many hallmark features of the style that are still intact today. The walls are polished brick with a notably smooth surface texture. The house retains its original wood, diamond-pane window sash, and an expansive open porch that wraps around the facade and north elevation. The porch roof has a wide overhang supported on open truss brackets and a slightly bell-shaped eave line. All these elements are common to the Craftsman Bungalow style. Despite recent deterioration, the Seargeant-Oldaker house is one of the premier and most architecturally intact examples of the Craftsman style in central Phoenix. It is individually listed on the National Register of Historic Places and the Phoenix Historic Property Register.

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For more information or for a copy of this publication in an alternate format, contact Planning & Development at (602) 262-7811 voice / (602) 534-5500 TTY.

- 2. Property Description.** Briefly describe the primary exterior features of your property, including information on style and materials of exterior siding/finishes, roof, doors/windows, porches, and any decorative or unique features of the property. For these features, indicate whether they are original or altered/replaced, and if they were altered/replaced when this occurred (if known).

As noted, the Sargeant-Oldaker House is a notable example of the Craftsman Bungalow style that is of singular significance and merit in the Roosevelt neighborhood in large part due to its condition and lack of alteration over time. The walls are a very formal surface of polished brick. The gable end on the west elevation features wood shingles (1986). The fascia boards of the bell-cast roofline appear to be original yet recently painted. The open porch on the north and west elevations is also a distinctive feature of the Craftsman Bungalow style. The original double-hung, wood sash windows are also original to the house.

The Sargeant-Oldaker house was rehabilitated in 1986 and converted to office use. The rehabilitation was overseen by the State Historic Preservation Office due to the use of the federal rehabilitation tax credits. While there was some repair and replacement, the overriding concern at the time focused on retaining as much of the character-defining original elements and materials as possible.

For many years, the Sargeant-Oldaker House was carefully maintained and would continue to be showplace for the potential of architecture and adaptive use/rehabilitation to be a viable mechanism to retain important historic resources.

- 3. Historic Property Inventory Form.** Attach a copy of the Historic Property Inventory Form (if available from the City of Phoenix HP Office) for your property.
- 4. Photographs.** Attach color photographs showing overall site, street views, all exterior facades and close-up views of original/decorative features, and areas where work is to be performed. Include interiors if the request includes interior work. Label views (i.e., north façade, east wood casement window).
- 5. Property Condition.** Describe the overall condition of the property, providing descriptive information on areas that are deficient or deteriorated. If an architectural or structural assessment has been performed, please attach. All requests for structural work need to include a structural assessment.

The Sargeant-Oldaker house is in very good condition inside and out. The architectural details that articulate the Craftsman style are notably intact. The obvious exception is the current wood shingle roof where the shingles are warped to the point of being unsightly although the roof does not leak. (The roof shingles were installed in 1986.) The remainder of the house is in good condition, the brick walls are solid with no evidence of cracking or settlement and the mortar joints are in good condition. Also, the wood windows and fascia boards are solid and painted with no evidence of damage.

Motley Design Group is currently preparing a Building Condition Assessment and a LIDAR scan for purposes of dimensional accuracy related to the relocation of the building as described in this application. They are working with Slaysman Engineering and Wolfe House Movers to ensure the structural integrity of the house during/after the move.

- 6. Previous Rehabilitation Work.** Briefly describe previous rehabilitation work you have already completed on your property as well as work that you are aware of that was conducted by previous owners. List the major work items and the year work was done.

The Sargeant-Oldaker House was completely rehabilitated in 1986. At that time the house was converted from residential to office use and all systems were replaced (plumbing, HVAC, electrical, etc). The project was a certified rehabilitation utilizing the federal historic tax credits. The Oldaker House was an early symbol of the potential of adaptive use as an approach for recapturing the character of the south portion of the Roosevelt neighborhood (south of McKinley). The Oldaker restoration set a high standard for preservation in Phoenix at a crucial time - when the preservation movement and indeed the City Historic Preservation ordinance and office were just being established.

The Oldaker House then went through a succession of owners who used it for office purposes. The house was eventually purchased by MetroWest Development who continued the office use. In more recent years, the Roosevelt neighborhood has become increasingly attractive as a mixed-use area and particularly as a highly-sought after residential destination with an emphasis on apartment buildings catering to an increasingly affluent residential market. There has been a notable transformation in south Roosevelt neighborhood during the last 10 years. The Oldaker House has been maintained over the long-term and has not had any substantive changes in the recent past.

The growth pressures on the Oldaker site, all heralded by various changes in the City General Plan, and PlanPhoenix, shifted the context/character of the house to the point where the building was threatened by land values and transitioning uses. This led to a period of vacancy/neglect to the point where relocating the house to a different site was being accepted as the only viable option.

IV. PROJECT INFORMATION

- 1. Project Purpose. Describe the primary purpose and objectives for the proposed project for which grant funds would be expended, and the proposed use of the building. Will the property be occupied at the end of the project, and if so, with what use?**

The current proposal offers a means of relocating and rehabilitating the Oldaker House in conjunction with a new housing complex designed to blend with and complement the architectural context of south Roosevelt along 3rd Avenue. The project will add approximately 100 new living units that are in high demand in the central core of Phoenix. It will also include and introduce a new restaurant/food venue into the very active marketplace.

The Oldaker House itself will accommodate the light-fare restaurant/bar venue. The Oldaker House will be owned by LiveFORWARD Development and the restaurant business operated by the Culinary Creative Group, LLC which now operates similar facilities in Denver, New Orleans and other western cities.

In order to accomplish these objectives the Oldaker House will be relocated approximately 25 feet northwest of its current site in a manner that respects the character and setting and allows the Oldaker House to remain listed on the National Register of Historic Places.

- 2. Contribution to Community Goals. Describe how the project contributes to community values, city economic development goals, and/or (where applicable) to the city downtown vision. If you have coordinated with neighborhood or community associations (highly encouraged), please describe and attach documentation (letters of support).**

Preserving this amazing structure and converting it into a restaurant will deliver a broad range of economic benefits, including increased property value, tourism attraction, job creation, local economic revitalization, cultural preservation, long-term investment, sustainability and positive public relations, a strategy that not only makes economic sense to the property but contributes to the cultural and architectural heritage of the Roosevelt community and downtown Phoenix.

The mixed use of projects such as the Oldaker House are causing transition of Roosevelt into another HERITAGE COMMERCIAL DISTRICT. The benefits of the "Heritage" districts are documented in the recent Preservation Phoenix Style report. Historic preservation is noted as an objective in the Phoenix General Plan and it cited as an economic development tool. The Roosevelt Action Association and groups such as the Arizona Preservation Foundation and Preserve Phoenix have endorsed the Oldaker relocation project as clearly preferable to demolition.

- 3. Project Plan. Describe how the proposed project fits into an overall plan to rehabilitate the building.**

The plan to relocate the building as part of the larger infill development project is integral to the rehabilitation of the building. The Oldaker House is being sited on the NW corner of the property in coordination with the design for the new housing structure (being designed by the Phoenix office of Shepley Bulfinch, a firm noted for contemporary infill architecture).

The overall plans and specifications for the Oldaker rehabilitation are currently being completed by Motley Design Group based on LIDAR measurements to ensure accuracy) and replacement/upgrading of the mechanical systems to accommodate the restaurant use. As noted, the plans will be subject to review by the State Historic Preservation Office and the National Park Service for compliance with the Secretary of the Interior's Standards for Rehabilitation.

- 4. Project Work Scope, Budget and Time Schedule.**

- a.) Cost estimates.** Cost estimates for all work items must be provided by licensed contractors, a construction estimator or other qualified individuals. Please attach actual estimates to the application. At least one cost estimate is required for each work item. The city HP Office solely determines if the estimates are adequate. If multiple bids are received, the applicant does not need to pick the lowest bid.
- b.) Itemized budget.** Include an itemized project list and budget for entire proposed project (including items not to be funded with Historic Preservation grant funds) using the form in Appendix A. The applicant must demonstrate that the project items he/she is funding independently are equal or greater in dollar amount than those items in the grant request.

EXAMPLE OF ITEMIZED BUDGET FOR A PROJECT:**Eligible Project Construction Items:**

Repaint brick walls on east and south facades	\$ 8,000.00
Repair/replace 16 wood-frame double-hung windows	\$ 12,000.00
Structural roof truss repairs	\$ 10,000.00
New built-up foam roof	\$ 10,000.00

Eligible Architectural/Structural Expenses:

Structural analysis of roof trusses	\$ 3,000.00
(Architectural studies/drawings must relate directly to grant-eligible work items only – cannot include work related to site plans, mechanical, electrical, plumbing, tenant improvements, etc. Can include pre-agreement expenses within 6 months of application.)	

A. Total Eligible Expenses \$ 43,000.00

Architectural/Structural expenses (limited to no more than 10% of request):

Amount **\$ 3,000.00** Percentage of Total Request **7.0%****Ineligible Construction Work to be Funded by Other Sources:**

Plumbing upgrades	\$ 10,000.00
Repair and refinish wood floors	\$ 15,000.00
Bring two bathrooms up to ADA compliance	\$ 10,000.00
Electrical rewiring	\$ 15,000.00
Installation of elevator to meet building code	\$ 12,000.00

B. Total Ineligible Work Items: \$ 62,000.00**C. Total Project Cost (A + B) \$ 105,000.00****D. Percent Overmatch (must be at least 1.0) (Divide B / A) 1.44%**

B: \$62,000.00 / A: \$43,000.00 = 1.44%

- c.) **Descriptions of work items.** Include narrative descriptions for all itemized work items proposed for Historic Preservation grant funding. Attach on a separate sheet using Appendix B. If contractor bids/cost estimates included detailed descriptions, this item may not be necessary.

Ex. of narrative description for one work item:

Repair 16 wood-frame double-hung windows. Project will replace two windows beyond repair in-kind to match existing. Fourteen windows need frame repair (new ledger, header and/or sill), sash repairs/replacement, and some new glass panes to replace missing and broken glass. Refer to attached window-by-window assessment and itemization from contractor.

- d.) **Detailed time schedule and work sequence.** Please attach a detailed time schedule for all proposed work items related to the full completion of this project – inside and out. This should include items funded and not funded by the grant program. Please list out work items sequentially in the order that they will be performed with approximate start and end dates for each work item. The time schedule should address architectural/engineering work; permit schedule; beginning of construction work; performance of all work items; and project completion.

5. Project Financial Information.

Provide information regarding financial capability of owner to complete the project. Such information should include: Proforma profit/loss statements for the business proposed, bank statements or other evidence that owner can obtain a loan from a bank, financial or lending institution to complete the project. If the project is proposing to use federal tax credits, grants, or other financial incentives, please provide evidence and information on the contribution of these sources and the status of these applications.

6. Drawings/Building Assessments. Please attach:

- a.) **Scaled site plan** showing location of main buildings, all outbuildings, existing & proposed fences and walls, and property lines. (This can be hand drawn or professionally drawn) If additions, demolitions or other site changes are proposed, please indicate on site plan. Indicate all areas of proposed work on the site plan (Note: Historic Preservation grant funds cannot be used for site work, new additions, or demolitions of historic building fabric).
- b.) **Conceptual Architectural plans or elevations** drawn to scale showing all building facades on which work is to be performed, with notes depicting locations/description of specific work items. Include roof plan when structural roof work is proposed. Color elevations are strongly encouraged. The HP Officer can agree to waive plans and elevations on a case-by-case basis depending on project circumstances and scope of work.
- c.) **Structural or architectural building assessments** that have already been completed for this building(s) where applicable.

V. INFORMATION ON PRIMARY LIENHOLDERS

The city's purchase of the Conservation Easement requires the consent of all lienholders. A title report will be obtained by the City to verify all information provided. Accuracy of this information is critical. Consent from the lienholder(s) must be received prior to disbursement of any funds.

1. Primary mortgage company: None, No Mortgage on Property
Contact person: _____
Correspondence address: _____
(Note: This is usually different than the payment address) _____

Company telephone number: _____
Company fax number: _____
Loan number: _____
2. Secondary mortgage company: _____
Contact person: _____
Correspondence address: _____
(Note: This is usually different than the payment address) _____

Company telephone number: _____
Company fax number: _____
Loan number: _____

VI. SIGNATURE

I declare that I have reviewed the Program requirements, including the Program Summary and all sample legal agreements, and am submitting this application in accordance with those requirements. All information submitted is true to the best of my knowledge and belief. I acknowledge that any error may affect its review and approval. I understand that if I wish to change any aspect of the project after it has been approved, I must obtain the written consent of the city Historic Preservation Office. I also understand that I will be required to obtain a Consent Agreement from my lienholder(s), and will sign and abide by the terms of the Deed of Conservation Easement and the Program Agreement. I understand and agree that the city Historic Preservation Office staff can perform necessary site visits on my property at mutually agreed upon times to facilitate their review of this proposal.

Scott Kilkenny
Property Owner Signature

11/16/2023
Date

Property Owner Signature

Date

An electronic submittal of the complete application packet (including all attachments) should be E-mailed to the assigned staff member or to the following address:

historic@phoenix.gov

File sizes that exceed 25 MB must be sent in separate emails. Links to download files from cloud storage services may be provided, although please note that city access to some sites may be blocked, so please verify with staff that all materials were received.

COST BREAKDOWN- ADDENDUM B

Client: 649 3rd Ave Partners LLC

Contractor: Evolution3.0 LLC

Property Address: 649 North 3rd Ave Phoenix, AZ

Mailing Address: 1001 North Central Ave Phoenix, AZ 85004

	<u>Project Name</u>		<u>ESTIMATED BUDGET</u>	Notes
PreConstruction, Design, & Engineering Inspections				
	Architecture/ MEP Engineering		\$ 56,800.00	Motley Design Group
	Soils Testing		\$ 2,125.00	
	Pre-Construction Surveys (Architectural Survey, Site Plan)		\$ 3,762.00	Various
	Infestation Remediation		\$ 7,350.00	ReVamped Pest Control
	Utilities Removal		\$ 7,770.00	Terminate existing services
	Temp Pole for New utilities		\$ 2,500.00	
	Demolition / Site Clearing		\$ 11,750.00	Demo existing foundation walls & backfill
	PreConstruction Consulting Fee		\$ 9,500.00	
	Structural/ Civil Engineering Insp/ MEP		\$ 7,700.00	Special Inspections
	Construction Surveys		\$ 5,500.00	
Permitting and Utility Fees				
	Sewer Tap Fee (SU DP Fee)		\$ 1,050.00	Estimated from COP Fee Schedule
	Water Tap & Meter Fee/ DOF Fees		\$ 6,550.00	Estimated from COP Fee Schedule
	Electric Service Fee		\$ 8,500.00	APS/ SRP
	Gas Line Fee		\$ 8,300.00	SW Gas
	Building Review & Permit Fees		\$ 19,622.00	Estimated Review & Permit Fees
	Right of Way Permits During Construction		\$ 1,500.00	COP Fees
Foundation and Ground Work				
	Tracking Pad		\$ 2,200.00	
	Erosion & Sediment Control		\$ 1,100.00	
	Excavation/Backfill		\$ 28,000.00	Excavate for new foundation
	Backfill/Hauling dirt off & onsite		\$ 4,200.00	Additional dirt haul off
	Foundation		\$ 72,000.00	New foundation system
	Interior Concrete Flatwork		\$ 4,500.00	New walkways
	Exterior porches		\$ 13,800.00	Rebuild new front porch to match existing
	City sidewalk		\$ 4,400.00	Replace sections of sidewalk
	Sanitary Sewer Install		\$ 12,500.00	Assumes new connection at street main
	Water Service Install		\$ 12,500.00	Assumes new connection at street main
	Onsite Underground Gas Line Install		\$ 8,750.00	New Gas Line & Meter
	Onsite Underground Electric Line Install		\$ 10,750.00	New Transformer and Service
Framing & Structure				
	House Movers		\$ 391,600.00	Wolfe House & Building Movers
	Roof Trusses & Roofing		\$ 66,000.00	Repair & Replace with Like (Decking/Synthetic Shingle Roof)

	<u>Project Name</u>		ESTIMATED BUDGET	Notes
Major Systems- Rough & Final				
	HVAC / Radiant / Humidification		\$ 18,500.00	New HVAC Systems
	Plumbing		\$ 22,800.00	Demo existing & Replace with New
	Electrical		\$ 25,500.00	Demo existing & Replace with New
	Fireplace Units/ Install		\$ 6,800.00	Repair of Existing
	Sprinkler Systems / Knox Box		\$ 26,500.00	
	Alarm System		\$ 11,500.00	
Exterior Finishes				
	Windows		\$ 5,500.00	Repair of existing Windows
	Specialty Siding/Trim labor &Mat		\$ 16,480.00	Refinish/Repair of existing
	Brick/Block/Decorative Stone Materials & Labor		\$ 22,790.00	Repair of existing brick systems
Interior Finishes				
	Insulation		\$ 6,200.00	New Attic Insulation
	Drywall & Texture		\$ 24,800.00	New drywall through out
	Hardwood Flooring Refinishing		\$ 16,250.00	Refinish/Repair of floors
	Interior Trim Materials (Doors, Hardware & Trim)		\$ 8,400.00	Refinish/ Repair
	Paint Interior & Exterior		\$ 8,190.00	All new Interior Paint & Exterior Elements
	Cabinet Install/Hardware Install		\$ 12,950.00	New Kitchen Cabinets
	Countertop Slab/Labor		\$ 4,600.00	Quartz Kitchen Countertop
	Plumbing Fixtures		\$ 6,500.00	New Bathroom Fixtures & Kitchen Sink
	Appliances & Install		\$ 5,400.00	
Site Completion/ General Conditions				
	General Conditions		\$ 34,400.00	Dumpsters, Fencing & Etc
	Builder Contingency		\$ 28,151.40	Contingency for Contractor use
	Supervision Fee		\$ 78,750.00	4 months
	General Liabilty Ins. (1% of Hard Cost)		\$ 8,956.11	
	GC Fee / Overhead and Profit		\$ 56,110.48	
Owner/Developer Costs				
	Land Cost		\$ -	
	Closing Costs		\$ -	
	Legal & Consulting Fees		\$ 4,800.00	
	Builders Risk & GL Insurance		\$ 36,581.84	
	Marketing		\$ -	
	Taxes		\$ 60,656.52	Arizona TPT Tax
	Development Fee		\$ -	
	Miscellaneous Expenses / Admin / Fund Exp.		\$ -	
	TOTAL PROJECT COST		\$ 1,350,645.34	
	PRECONSTRUCTION & DESIGN		\$ 114,757.00	
	SOFT COSTS: PERMITTING & UTILITIES		\$ 45,522.00	
	HARD CONSTRUCTION COST		\$ 876,560.00	
	FEES/CONTINGENCY/GENERAL CONDITIONS		\$ 206,367.99	
	OWNER / DEVELOPER COSTS		\$ 102,038.35	

Rehab Portion of Costs	\$ 899,288.34	Rehab Portion of GC Supervision Fee \$56,700 & GC Fee (OH&P) \$40,399.54
House Moving Portion of Costs	\$ 451,357.00	House Moving Portion of GC Supervision Fee \$22,050 & GC Fee (OH&P) \$15,710.93