

# City of Phoenix

*Meeting Location:  
City Council Chambers  
200 W. Jefferson St.  
Phoenix, Arizona 85003*



**City of Phoenix**

## Agenda

**Wednesday, December 18, 2024**

**10:00 AM**

**City Council Chambers**

### **Transportation, Infrastructure, and Planning**

#### **Subcommittee**

*Vice Mayor Debra Stark, Chair  
Councilman Carlos Galindo-Elvira  
Councilwoman Kesha Hodge Washington  
Councilwoman Laura Pastor*

If viewing this packet electronically in PDF, open and use bookmarks to navigate easily from one item to another.

## OPTIONS TO ACCESS THIS MEETING

Virtual Request to speak at a meeting:

- Register online by visiting the City Council Meetings page on phoenix.gov at least 2 hours prior to the start of this meeting. Then, click on this link at the time of the meeting and join the Webex to speak:

<https://phoenixcitycouncil.webex.com/phoenixcitycouncil/onstage/g.php?MTID=ea0a0af05428d3f6d9e920f0d58f4073a>

- Register via telephone at 602-262-6001 at least 2 hours prior to the start of this meeting, noting the item number. Then, use the Call-in phone number and Meeting ID listed below at the time of the meeting to call-in and speak.

In-Person Requests to speak at a meeting:

- Register in person at a kiosk located at the City Council Chambers, 200 W. Jefferson St., Phoenix, Arizona, 85003. Arrive 1 hour prior to the start of this meeting. Depending on seating availability, residents will attend and speak from the Upper Chambers, Lower Chambers or City Hall location.

- Individuals should arrive early, 1 hour prior to the start of the meeting to submit an in-person request to speak before the item is called. After the item is called, requests to speak for that item will not be accepted.

At the time of the meeting:

- Watch the meeting live streamed on phoenix.gov or Phoenix Channel 11 on Cox Cable, or using the Webex link provided above.

- Call-in to listen to the meeting. Dial 602-666-0783 and Enter Meeting ID 2552 805 7130# (for English) or 2555 881 5452# (for Spanish). Press # again when prompted for attendee ID.

- Watch the meeting in-person from the Upper Chambers, Lower Chambers or City Hall depending on seating availability.

Para nuestros residentes de habla hispana:

- Para registrarse para hablar en español, llame al 602-262-6001 al menos 2 horas antes del inicio de esta reunión e indique el número del tema. El día de la reunión, llame al 602-666-0783 e ingrese el número de identificación de la reunión 2555 881 5452#. El intérprete le indicará cuando sea su turno de hablar.

- Para solamente escuchar la reunión en español, llame a este mismo número el día de la reunión (602-666-0783; ingrese el número de identificación de la reunión 2555 881 5452#). Se proporciona interpretación simultánea para nuestros residentes durante todas las reuniones.

- Para asistir a la reunión en persona, vaya a las Cámaras del Concejo Municipal de Phoenix ubicadas en 200 W. Jefferson Street, Phoenix, AZ 85003. Llegue 1 hora antes del comienzo de la reunión. Si desea hablar, regístrese electrónicamente en uno de los quioscos, antes de que comience el tema. Una vez que se comience a discutir el tema, no se aceptarán nuevas solicitudes para hablar. Dependiendo de cuantos asientos haya disponibles, usted podría ser sentado en la parte superior de las cámaras, en el piso de abajo de las cámaras, o en el edificio municipal.

Miembros del público pueden asistir a esta reunión en persona. El acceso físico al lugar de la reunión estará disponible comenzando una hora antes de la reunión.

## **CALL TO ORDER**

## **MINUTES OF MEETINGS**

### **1 Minutes of the Transportation, Infrastructure and Planning Subcommittee Meeting**

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This item transmits the minutes of the Transportation, Infrastructure and Planning Subcommittee Meeting on November 20, 2024 for review, correction or approval by the Transportation, Infrastructure and Planning Subcommittee.

#### **THIS ITEM IS FOR POSSIBLE ACTION.**

#### **Responsible Department**

This item is submitted by Deputy City Manager Mario Paniagua and the City Manager's Office.

#### *Attachments*

[Attachment A - November 20, 2024 TIP Minutes](#)

## **CONSENT ACTION (ITEMS 2-5)**

### **2 West Transit Facility Fixed Route Bus Service - Request for Contract Award - Citywide**

Page 14

Request the Transportation, Infrastructure and Planning Subcommittee to recommend City Council approval to enter into an agreement with First Transit, Inc. (a wholly owned subsidiary of Transdev Services, Inc.) for the management and operation of fixed route bus service from the City's West Transit Facility.

#### **Responsible Department**

This item is submitted by Deputy City Manager Mario Paniagua and the Public Transit Department.



3 **New Lease Agreement with Arizona State Lottery at Phoenix Sky Harbor International Airport - District 8** Page 16

Request the Transportation, Infrastructure, and Planning Subcommittee to recommend City Council approval to enter into a new lease agreement with the State of Arizona by and through the Arizona State Lottery Commission (Arizona Lottery) for the sale of lottery tickets at Phoenix Sky Harbor International Airport (PHX).

**Responsible Department**

This item is submitted by Deputy City Manager Mario Paniagua and the Aviation Department.

4 **Approval of Phil Gordon Threatened Building Grant - George H. and Mabel M. Lutgerding Residence - 303 W. Willetta Street - District 7** Page 18

This report requests the Transportation, Infrastructure and Planning Subcommittee recommend City Council approval of a Phil Gordon Threatened Building grant of up to \$199,500 to assist with the rehabilitation of the historic George H. and Mabel M. Lutgerding Residence located at 303 W. Willetta Street.

**THIS ITEM IS FOR CONSENT ACTION.**

**Responsible Department**

This item is submitted by Deputy City Manager Alan Stephenson and the Planning and Development Department.

*Attachments*

[Attachment A - 303 W Willetta Application.pdf](#)

5 **Energy Access Target Adoption - Citywide**

Page 116

Request the Transportation, Infrastructure, and Planning Subcommittee recommend City Council approval to adopt a proposed Energy Access target to increase Phoenix household participation in low-income energy assistance programs 25 percent by 2030.

**THIS ITEM IS FOR CONSENT ACTION**

**Responsible Department**

This item is submitted by Deputy City Managers Mario Paniagua and Alan Stephenson, the Office of Sustainability, and the Office of Environmental Programs.

**INFORMATION AND DISCUSSION (ITEMS 6-7)**

6 **Asset Management Program Update - Water and Wastewater  
Treatment Plants and Remote Facilities - Citywide**

Page 118

This report provides the Transportation, Infrastructure, and Planning Subcommittee with information on the Water Services Department's Asset Management Program for Water and Wastewater Treatment Plants and Remote Facilities.

**THIS ITEM IS FOR INFORMATION AND DISCUSSION.**

**Responsible Department**

This item is submitted by Deputy City Manager Ginger Spencer and the Water Services Department.

**7 Infrastructure Funding and Financing Update - Citywide**

Page 122

This report provides information to the Transportation, Infrastructure and Planning Subcommittee on infrastructure funding and financing challenges to serve newly developing parcels in Phoenix. The report provides general infrastructure funding and financing information, however, the complexity of the topic necessitates a focused approach on water infrastructure because of the significant infrastructure needs to address new growth areas of the City.

**THIS ITEM IS FOR DISCUSSION AND POSSIBLE ACTION.**

**Responsible Department**

This item is submitted by Deputy City Managers Alan Stephenson, Ginger Spencer and Inger Erickson, the Planning and Development, Water Services, and Street Transportation departments and the Office of the City Engineer.

*Attachments*

[Attachment A -Citywide Development Map.pdf](#)

**000 CALL TO THE PUBLIC**

**FUTURE AGENDA ITEMS**

**ADJOURN**

For further information or reasonable accommodations, please call the City Council Meeting Request line at 602-262-6001. 7-1-1 Friendly.

Persons paid to lobby on behalf of persons or organizations other than themselves must register with the City Clerk prior to lobbying or within five business days thereafter, and must register annually to continue lobbying. If you have any questions about registration or whether or not you must register, please contact the City Clerk's Office at 602-534-0490.

**Members:**

Vice Mayor Debra Stark, Chair  
Councilman Carlos Galindo-Elvira  
Councilwoman Kesha Hodge Washington  
Councilwoman Laura Pastor



City of Phoenix

Transportation, Infrastructure, and Planning  
Subcommittee

Report

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Agenda Date: 12/18/2024, Item No. 1

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**Minutes of the Transportation, Infrastructure and Planning Subcommittee Meeting**

This item transmits the minutes of the Transportation, Infrastructure and Planning Subcommittee Meeting on November 20, 2024 for review, correction or approval by the Transportation, Infrastructure and Planning Subcommittee.

**THIS ITEM IS FOR POSSIBLE ACTION.**

The minutes are included for review as **Attachment A**.

**Responsible Department**

This item is submitted by Deputy City Manager Mario Paniagua and the City Manager's Office.

## Attachment A

### Phoenix City Council Transportation, Infrastructure, and Planning (TIP) Subcommittee Summary Minutes Wednesday, November 20, 2024

City Council Chambers  
200 W. Jefferson St.  
Phoenix, Arizona

#### Subcommittee Members Present

Vice Mayor Debra Stark (Chair)  
Councilman Carlos Galindo-Elvira  
Councilwoman Laura Pastor\*  
Councilwoman Kesha Hodge Washington

#### Subcommittee Members Absent

#### **CALL TO ORDER**

Chairwoman Stark called the Public Safety and Justice Subcommittee to order at 10:05 a.m. with Chairwoman Debra Stark and Councilman Carlos Galindo-Elvira present. Councilwoman Kesha Hodge Washington attended virtually.

#### **CALL TO THE PUBLIC**

None.

#### **MINUTES OF MEETINGS**

##### **1. Minutes of the Transportation Infrastructure, and Planning Subcommittee Meeting**

Councilman Galindo-Elvira made a motion to approve the minutes of the October 16, 2024 Transportation, Infrastructure, and Planning meeting. Councilwoman Hodge Washington seconded the motion which passed unanimously, 3-0.

##### **CONSENT ACTION (ITEM 2)**

Items 2 was for consent action. No presentations were planned, but staff was available to answer questions.

##### **2. Route 27 service modification to provide bus service on Durango Street - District 7**

Councilman Galindo-Elvira made a motion to approve Item 2. Councilwoman Hodge Washington seconded the motion which passed unanimously, 3-0.

### **INFORMATION ONLY (ITEMS 3-4)**

#### **3. Water Services Department Six-Year Capital Improvement Program for Fiscal Years 2025-30**

Information only. No councilmember requested additional information.

#### **4. Federal Bipartisan Infrastructure Law / Infrastructure Investment & Jobs Act and Federal Inflation Reduction Act – Discretionary Grant Funding Update – Citywide**

Information only. No councilmember requested additional information.

### **INFORMATION AND DISCUSSION (ITEM 5)**

#### **5. Regional Transit Fare Collection System Improvement Project Update – Citywide**

Public Transit Director Jesus Sapien, Valley Metro Representative Ken Kessler, and Valley Metro Representative Dane Ryals presented on this item. Mr. Ryals outlined the implementation of a new regional fare collection system for public transit in the City. Mr. Ryals discussed the features and benefits of the new system including improved system accessibility, real-time trip planning, equitable fare capping, and maintaining affordability with a phased rollout to benefit all customers.

\*Councilwoman Laura Pastor arrived at Council Chambers at approximately 10:09 a.m.

Councilman Galindo-Elvira asked if services are provided in Spanish.

Mr. Ryals confirmed services are provided in Spanish.

Councilwoman Pastor asked about recommendations for youth programs who have paper tickets.

Mr. Ryals stated he will be working with youth programs and college students to transfer tickets and credits to the new system.

Councilwoman Pastor asked how students can receive the reduced fair discount.

Mr. Ryals answered students will have to show their school identification card to get the reduced fair discount.

Councilwoman Pastor asked how Valley Metro will be supporting senior citizens in receiving the new card and getting the reduced fair price.

Mr. Ryals confirmed senior residents will be able to purchase a new card at several retail outlets, gas stations, and grocery and convenience stores. He mentioned senior residents will need to show an identification card and they will receive ten years of eligibility instead of the previous five.

Councilwoman Pastor inquired how residents without an identification card could obtain a new one and asked whether medical documents or a passport would suffice.

Mr. Ryals stated medical documentation would be acceptable and explained the process could also be completed online.

Councilwoman Pastor shared resident concerns and her concern about accessibility for senior citizens.

Mr. Sapien confirmed there would be a regional Valley Metro meeting the next day and American with Disability Act (ADA) compliance will be discussed.

Chairwoman Stark opened the floor for public comment.

John Hinz expressed his concern regarding the new Copper card system safety and accessibility for seniors.

Chairwoman Stark asked for Valley Metro to provide an update regarding system security.

Mr. Ryals confirmed there are security processes in place with the new system such as data encryption.

Councilwoman Pastor asked if residents are able to purchase a reduced fare ticket if they want to pay in cash.

Mr. Ryals expressed residents will still be able to buy a reduced fare ticket with cash.

Councilwoman Pastor inquired about the procedure in place for when the server is not working on the bus.

Mr. Ryals stated the bus will still be able to accept tickets when the bus is not connected to the internet.

## **DISCUSSION AND POSSIBLE ACTION (ITEM 6)**

### **6. Ordinance to Establish the Network Infrastructure Services License by Creating New Chapter 5D of the Phoenix City Code and to Establish an Effective Date – Citywide**

Deputy City Manager Alan Stephenson, City Engineer Eric Froberg, and Special Project Administrator Kevin Sonoda presented this item. Mr. Stephenson and Mr. Froberg discussed the City's plans to introduce a new code chapter to regulate the installation of fiber optic networks.

Councilman Galindo-Elvira inquired about the measures the City has implemented to ensure contractors are properly trained and certified.



Mr. Stephenson confirmed he will provide an update prior to the next council meeting.

Councilwoman Pastor asked for ongoing updates if the information is not provided prior to the next council meeting.

Chairwoman Debra Stark opened the floor for public comment.

Jeremiah Davis expressed his concern regarding contractor transparency and licensure.

Shad Ercanbrack expressed concern about contractors lacking proper training when serving the community and completing projects.

William Cody expressed his concern regarding the City partnering with contractors who are untrained. He encouraged the City to make contractor disclosures mandatory.

Chairwoman Stark asked about provisions in the ordinance discussing transparency.

Mr. Stephenson stated measures were in place to ensure contractors were licensed in Arizona. He explained the City might not be able to require state and federal tax identification numbers because the contractors were hired through a third-party partner rather than directly by the City.

Councilman Galindo-Elvira made a motion to move this item forward to the Council to include future revisions from staff that incorporate any additional stakeholder input. Councilwoman Hodge Washington seconded the motion, which passed unanimously, 4-0.

### **CALL TO THE PUBLIC**

Edward Dzink raised concerns about a Streets study and questioned whether it was accessible to the public.

Jerry Van Gasse expressed his concerns about construction material being dumped at South Mountain Park.

Harry Whitesell discussed his concern regarding fiber optics in his neighborhood.

### **FUTURE AGENDA ITEMS**

None.

### **ADJOURNMENT**

Chairwoman Stark adjourned the meeting at 11:25 a.m.

Respectfully submitted,  
Destinee Sior  
Management Fellow



## **West Transit Facility Fixed Route Bus Service - Request for Contract Award - Citywide**

Request the Transportation, Infrastructure and Planning Subcommittee to recommend City Council approval to enter into an agreement with First Transit, Inc. (a wholly owned subsidiary of Transdev Services, Inc.) for the management and operation of fixed route bus service from the City's West Transit Facility.

### **Summary**

This contract is for management and operation of the fixed route bus service operating from the Public Transit Department's (PTD) West Transit Facility, located at 405 North 79th Avenue. There are 170 vehicles located at the West Transit Facility which are used to provide service for one neighborhood circulator route and 11 local bus routes throughout the region. The service accounts for 546,000 service miles a month, or about 30 percent of Phoenix's local bus service. The routes also account for over one million regional passenger boardings per month.

First Transit, purchased by Transdev Services, Inc. in 2023, currently provides fixed route bus service from the West Transit Facility. Transdev Services, Inc. also provides fixed route bus service from the City's North and South facilities. The company currently employs 560 local staff at the West Transit Facility and 990 at the other two facilities. Services from all locations were competitively procured to meet Federal Transit Administration (FTA) requirements and are contracted under separate agreements with different start and expiration dates.

Under this contract, First Transit is committed to build on their ongoing relationships within the community, including support and partnerships with Arizona veterans' organizations, Phoenix Union High School District, Chicanos Por La Causa, Opportunities Industrialization Center, and St. Vincent De Paul. In addition, First Transit partners with local disadvantaged business enterprises (DBEs) to fulfill the company's commitment to the City.

### **Procurement Information**

A Request for Proposals, PTD24-005, was processed in accordance with City of Phoenix Administrative Regulation 3.10.

Two vendors submitted proposals and both were deemed responsive and responsible. An evaluation committee of City staff and staff from the City of Avondale, which purchases fixed route service from the City, evaluated offers based on the following criteria, with a maximum possible point total of 1,000:

- Method of Approach (275 points)
- Management Structure and Personnel (225 points)
- Corporate Experience and Past Performance (100 points)
- Facilities Experience (100 points)
- Price Proposal (300 points)

The evaluation panel recommends contract award to First Transit, Inc. based on the following scoring:

- First Transit, Inc.: 883 points
- MV Public Transportation, Inc.: 751 points

### **Contract Term**

The contract will be for a five-year term beginning on or about July 1, 2025, with a two-year option to extend at the City's sole discretion. In addition, if the City deems it necessary, the City may extend the initial term or the option term on a month-to-month basis for up to six months.

### **Financial Impact**

The total aggregate contract value will not exceed \$626,785,658. Funds are available in the Public Transit Department's budget.

### **Concurrence/Previous Council Action**

This item was recommended for approval at the Citizens Transportation Commission meeting on December 5, 2024, by a vote of 8-0.

### **Responsible Department**

This item is submitted by Deputy City Manager Mario Paniagua and the Public Transit Department.



## **New Lease Agreement with Arizona State Lottery at Phoenix Sky Harbor International Airport - District 8**

Request the Transportation, Infrastructure, and Planning Subcommittee to recommend City Council approval to enter into a new lease agreement with the State of Arizona by and through the Arizona State Lottery Commission (Arizona Lottery) for the sale of lottery tickets at Phoenix Sky Harbor International Airport (PHX).

### **Summary**

Since December 2015, Arizona Lottery has leased space in Terminal 4 under Lease 141902 to operate a pre-security retail counter location for lottery ticket sales. In September 2020, the Lease with Arizona Lottery was amended to expand its presence in Terminal 4 by adding additional lottery vending kiosks in post-security locations, adjusting the net rent revenue structure to percentage of sales generated by lottery counter and vending locations, and extending the term of the Lease to expire on December 31, 2024.

Arizona Lottery desires to enter into a new lease agreement to continue offering lottery product sales opportunities through modern, tech-friendly vending equipment and expanding lottery vending sales locations, which may include Terminal 3 and the Rental Car Center at PHX.

### **Procurement Information**

In accordance with City of Phoenix Administrative Regulation 3.10, standard competition was waived as a result of an approved Determination Memo based on the following reason: Sole Source because Arizona Lottery is the only state-operated entity with exclusive rights to provide the sale of lottery products.

### **Contract Term**

The lease will begin on or about January 1, 2025, with a three-year term and four one-year options to extend the term at the sole discretion of the Aviation Director.

### **Financial Impact**

Arizona Lottery will pay percentage rent equal to eight percent of gross sales generated by lottery tickets sold at PHX. According to Arizona Revised Statutes

section 5-555(A)(4), eight percent is the maximum payment compensation percentage to licensed sales location for lottery tickets sold. The estimated annual revenue to the City is \$144,000 and will result in approximately \$1,008,000 over the seven-year aggregate term of the lease.

**Concurrence/Previous Council Action**

The Phoenix Aviation Advisory Board recommended approval of this item on November 21, 2024, by a vote of 5-0.

**Location**

Phoenix Sky Harbor International Airport, 2485 E. Buckeye Road  
Council District: 8

**Responsible Department**

This item is submitted by Deputy City Manager Mario Paniagua and the Aviation Department.



**Approval of Phil Gordon Threatened Building Grant - George H. and Mabel M. Lutgerding Residence - 303 W. Willetta Street - District 7**

This report requests the Transportation, Infrastructure and Planning Subcommittee recommend City Council approval of a Phil Gordon Threatened Building grant of up to \$199,500 to assist with the rehabilitation of the historic George H. and Mabel M. Lutgerding Residence located at 303 W. Willetta Street.

**THIS ITEM IS FOR CONSENT ACTION.**

**Summary**

Located at the southwest corner of 3rd Avenue and Willetta Street, the Lutgerding Residence was constructed circa 1912. The property was listed in the National Register of Historic Places as a contributor to the Kenilworth Historic District in 1983 and listed in the Phoenix Historic Property Register as part of the Roosevelt District in 1986. The property is a significant example of Tudor Revival-style architecture designed by prominent Phoenix architect Leighton G. Knipe and was acknowledged as individually eligible for historic designation should certain non-historic modifications to the property be reversed.

During the Great Depression and World War II, the home was used as a boarding house, and in 1971, it became a group home. A number of modifications were made to the building to increase and divide space to accommodate this use, including additions to the front and side elevations.

The current property owners, Johnny and Criselda Sweet purchased the home in September of 2024 with the intention of converting the property back to single family use and reversing a number of the prior modifications. The owners submitted a threatened building grant application on October 9, 2024 (**Attachment A**). The owners are seeking funding assistance for the following eligible work items:

1. Installation of new period-appropriate diamond-paned windows;
2. Repair and restoration of original windows where present;
3. Replacement of exterior doors to match originals;
4. Full roof replacement on main structure;

5. Repair/replacement of half-timbering on gable ends;
6. Various brick repairs;
7. Demolition of non-historic additions and restoration of front facade;
8. Replacement of missing section of front porch wall; and
9. Various stucco repairs.

The cost of the entire rehabilitation project is estimated at \$600,000.

Staff recommends allocating the use of \$199,500 in available Phil Gordon Threatened Building grant funds for this project.

If approved, the grant funds will be disbursed to the applicant on a reimbursement basis. The applicant will be required to provide evidence of a dollar-for-dollar match.

**Financial Impact**

The requested amount is \$199,500. In exchange for the grant funds, the City will receive a 30-year conservation easement. The easement will require that the property be preserved and that it be insured and maintained in good repair once rehabilitation is completed.

**Concurrence**

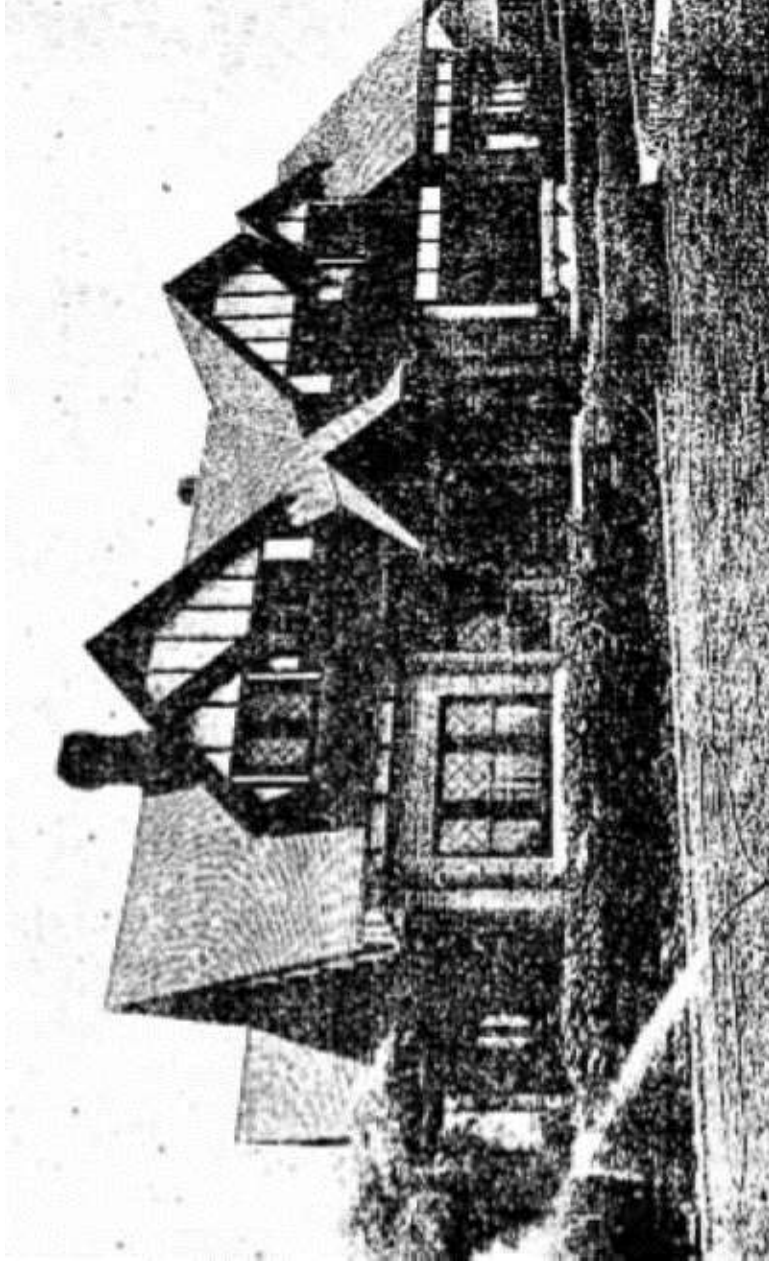
The Historic Preservation Commission recommended approval of this item on October 21, 2024, by a 6-0 vote.

**Location**

303 West Willetta Street  
Council District: 7

**Responsible Department**

This item is submitted by Deputy City Manager Alan Stephenson and the Planning and Development Department.



# TUDOR REVIVAL

303 WEST WILLETTA STREET

THREATENED BUILDING PROGRAM APPLICATION

Submitted by JOHNNY & CRISELDA SWEET on October 9, 2024



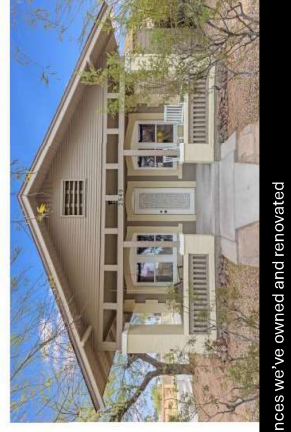
# Let's Make History!

## Dear City of Phoenix,

Thank you for the opportunity to share our vision with you for 303 W Willetta St. Through this application, we hope to demonstrate how the investment we're seeking will **SAVE an iconic Roosevelt landmark** and immediately **CONTRIBUTE to the City of Phoenix's goals and values**. We want this project to become one of your biggest success stories!

My wife and I are passionate about restoring historic properties in Phoenix. We first met at the Historic First Presbyterian church building on 5th Avenue and Monroe, and in our 12 years of marriage since, we have lived in seven different historic districts: Idylwilde Park, Pierson Place, Willo, F.Q. Story, Roosevelt (North), Roosevelt (South), and Coronado. Old houses (and everything that comes with them!) are an integral part of our story, and our passion for them continues to increase as the years go on.

In the four-plus combined years we lived in Roosevelt, we would often walk past the corner of 3rd Avenue and Willetta and admire the "potential" of **303 W Willetta St**, a 1912 Tudor Revival (which has operated as a group home for 50+ years), dreaming of the day when someone would restore it to its original look and use. Lo and behold, a phone call from a friend in 2024 yielded the information that the property might soon be for sale, and we immediately decided we wanted to become its next caretakers! Today, we are ready to get started on the restoration and eventually make it our family's primary residence. Little did we know that we would be the ones to fulfill our dream all those years ago!



The Sweet family and the various historic primary residences we've owned and renovated

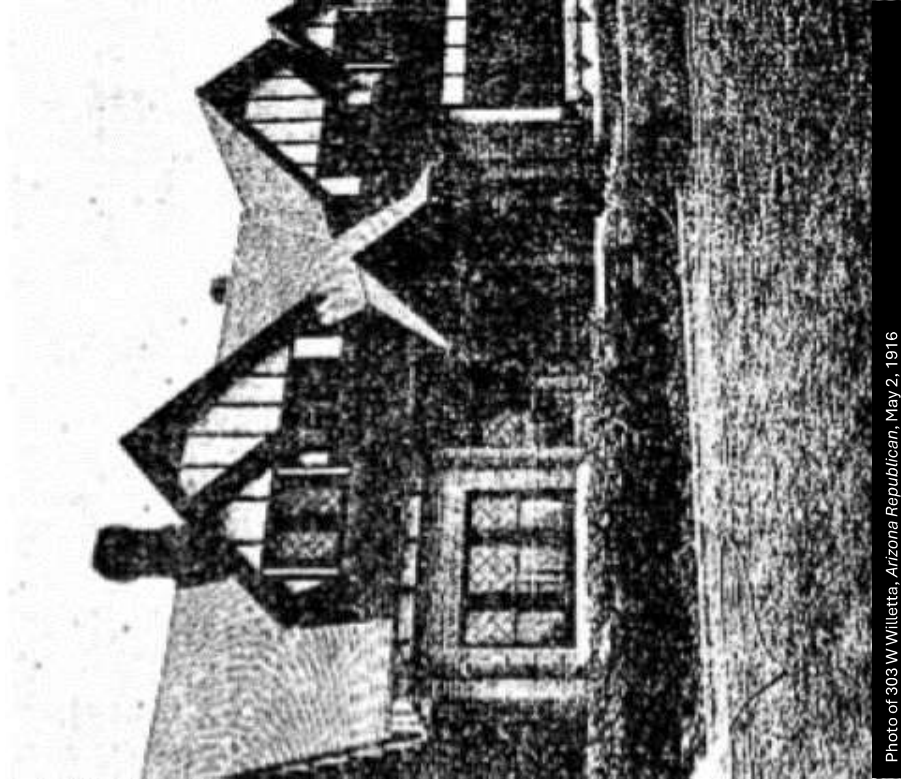


Photo of 303 W Willetta, Arizona Republican, May 2, 1916

Today, we have a simple three-fold vision to:

1. **Save and restore** the original beauty of the George H. Lutgerding House
2. **Add historic value to the Roosevelt neighborhood** and surrounding community
3. **Maximize the City's investment** by becoming one of its biggest Threatened Building success stories

The Lutgerding House (ca. 1912) is regarded in Phoenix literature<sup>1</sup> as architecturally significant for its outstanding Tudor Revival design. However, it has fallen into disrepair over its last 50 years of operation as a group home, and unsightly additions have hidden—but not destroyed—much of its character.

We've learned that Historic Preservation views a "successful rehabilitation" as one that:

- Retains as much of the original historic materials as possible, and
- Preserves those historic architectural features that are the character-defining elements of a particular historic style or method of construction

In accordance with these principles, we plan to complete a full restoration of the Lutgerding House and much of the work will be focused on the exterior. The structure has two large additions on the front corners, which hide original sleeping porches, windows, and doorways. Additionally, many of the original diamond-paned windows have been replaced with cheap alternatives, and there is significant deferred maintenance with the roof, masonry, stucco, and wood elements of the exterior. Our full scope of work for the project includes:

- **\$600,000** total budget – **\$199,500** eligible, **\$400,500** non-eligible (interior, mechanical, landscaping)

The Roosevelt neighborhood will benefit from 303 W Willetta being restored to its former look and use, and we can't think of a better project for the city of Phoenix to invest in. Our hope is to provide wonderful return on investment for the City by delivering a fully restored historic treasure that will be enjoyed and admired for generations to come.

With gratitude,  
Johnny and Criselda Sweet

<sup>1</sup> Arizona State Historic Property Inventory, July 1982





1. Applicant: **John and Criseida Sweet**
2. Legal Name of Property Owner: **John N. Sweet, Criseida Sweet**
3. Mailing Address: **2549 N Mitchell St, Phoenix, AZ 85006**
4. Phone: **602-317-9353**
5. Email Address: **jsweetphx@gmail.com**
6. Property Address: **303 W Willetta St, Phoenix, AZ 85003**
7. Historic District (or name of individually-listed/eligible building): **Roosevelt (North)**
8. Current Use of Property: **Group Home**
9. Is Property Vacant?  Yes  No If Yes, Length of Time Vacant? **1 Month**
10. Date Current Owner Purchased Property: **September 30, 2024**



Aerial view of 303 W Willetta (starred) and surrounding area, 1930

# Historical/Architectural Significance

## A Knipe-Designed Piece of Arizona History

We have conducted many hours of research on the history of 303 W Willetta. Here's a summary of our key findings related to its historical and architectural significance:

- The house was originally built in 1912 by Leighton G. Knipe for George H. Lutgerding as a generous single-family residence.
- **George Lutgerding** was a prominent rancher, secretary of Lutgerding-Eagan General Contractors, treasure of the Salt River Valley Water Users' Association, and associated with the Union Bank and Trust Company and the First National Bank of Arizona.
- **Leighton G. Knipe** was a prominent architect whose designs include:
  - The Knipe House
  - The Marcellin "Frenchy" Vieux House (508 W Portland)
  - Tempe City Hall
  - Tempe National Bank
  - Jefferson Hotel (considered one of the first "high rise" buildings in Phoenix)
  - As well as several large estates in California
- The Lutgerdings previously owned one of the "nicest homes in Salt River Valley"<sup>1</sup> (also a Knipe design), but sold it when someone made an offer on the spot. They then enlisted Mr. Knipe to design their new residence at 303 W Willetta.
- The house is an "outstanding example"<sup>2</sup> of Tudor Revival architecture for its: distinctive massing, steeply pitched gables, half-timbering, and diamond-paned window lights.

*Arizona Republican, Sun, July 14, 1912*

...the way of fine residences. The house has large, ample verandas, massive architectural designs, the very latest and the most stylish finishings was placed on the interior of the house. The new owner Mr. Humbert, can now boast of one of the nicest homes in Salt River valley. The property has 100 feet facing first avenue, and 140 feet facing Roosevelt, being located just one block from Central avenue, which makes this very valuable property. Mr. and Mrs. George Lutgerding had not expected to sell their home but it had taken the fancy of Mr. Humbert, who made a point blank offer that was accepted by the Lutgerdings. It is the idea of Mr. and Mrs. Lutgerding to now go out further and get a large piece of ground. The Lutgerding home which was sold to Mr. Humbert was designed by Mr. Knipe, who is now working on plans for the new home for the Lutgerdings.

*Arizona Republican, Sun, Dec 29, 1912*

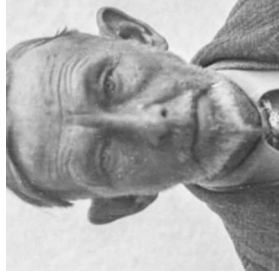
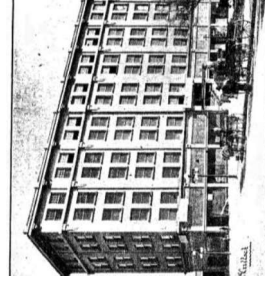
...holiday.

Miss Rosemary Conway will return to Redlands this evening after a week's stay in town the guest of her brother, Power Conway.

Mr. and Mrs. Edgar Kahn passed the early part of the week here enroute for California from Peoria. During their brief stay they were the guests of their cousins, Mr. and Mrs. Sidney J. Ross at their attractive country place on the Black Canyon Road.

Mr. and Mrs. George H. Lutgerding who are domiciled at 808 North Fourth Avenue will move into their handsome new residence at Third Avenue and Willetta street in a few days, they are anticipating a visit of Mrs. Lutgerding's mother and sister, Mrs. J. G. Cherry, Miss Agatha Cherry and Miss Nell Cherry who will arrive from Cedar Rapids, January 6.

Mrs. T. W. Penberton of North Central Avenue is in Hollywood for a



<sup>1</sup>Arizona Republican, July 14, 1912      <sup>2</sup> Arizona State Historic Property Inventory, July 1982

Left: The Jefferson Hotel, Center: Leighton G. Knipe, Right: George H. Lutgerding



Above: "House of Mudge" from 1940s (left), view of living room from 1940s (right)  
Below: Vintage "House of Mudge" guest house postcard



- In the late 1920s, the property was purchased by **Orville Mudge** and used as a guest house/boarding home during the Great Depression and World War II.
  - Note: We have become connected with the great-grandson of Orville Mudge, who has provided additional information about the property including some historical photos from the 1930s/1940s (see upper left and next page).
- In 1971, the property was purchased by Toby Citron and became known as the Toby House, a group home for mentally challenged patients. It has been operating as such ever since.
- On the Arizona State Historic Property Inventory (1982), it was said that despite its alterations, **"the house is an outstanding example of Tudor Revival architecture in Phoenix and may be individually eligible for the National Register."**
- Today, the parcel is zoned DTC (Downtown Code) Roosevelt North and some of its permitted uses include single-family and multi-family residential.



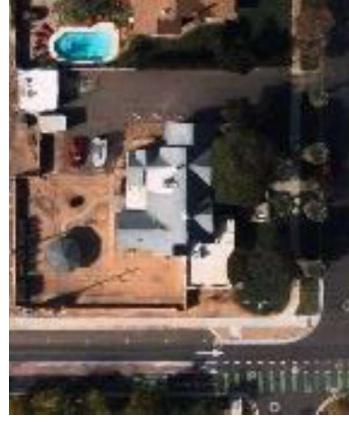
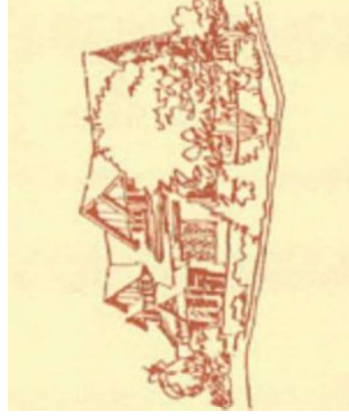
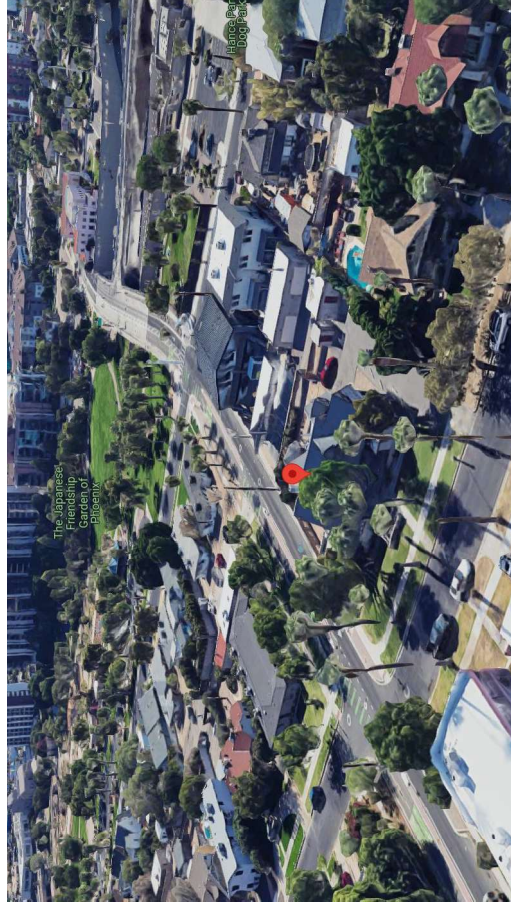


# Property Description

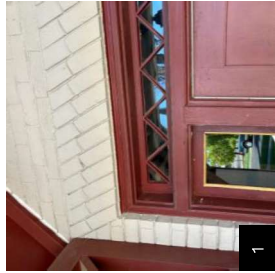
## A Prominent Roosevelt Landmark

303 W Willetta St is situated on a prominent double lot on the Southwest corner of 3rd Ave and Willetta, along the recently constructed 3rd Ave bike path and just one block north of Margaret T. Hance Park.

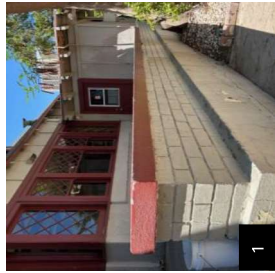
According to the Arizona State Historic Property Inventory, “the house takes advantage of its corner lot to show off its collection of gables.” The house is constructed of brick, with tall stucco gables with half-timbering. There is a consistent motif of diamond-paned windows that carries throughout the property, including the interior dining hutch and sets of French doors in the living and dining rooms.



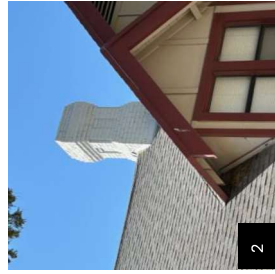




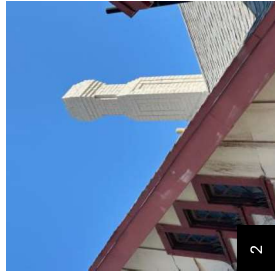
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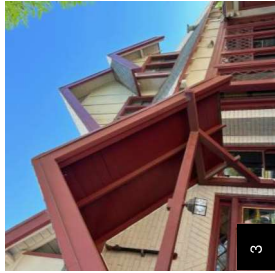
1



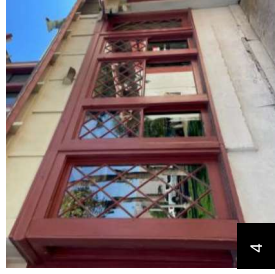
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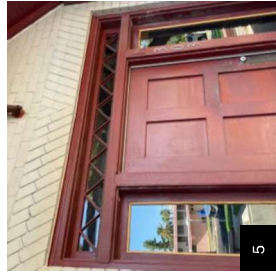
2



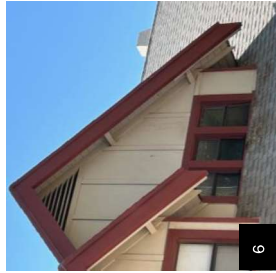
3



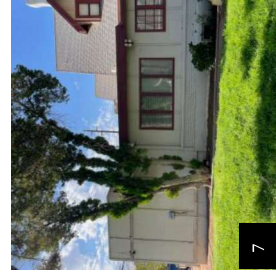
4



5



6



7

Here is a summary of the noteworthy exterior features and their condition:

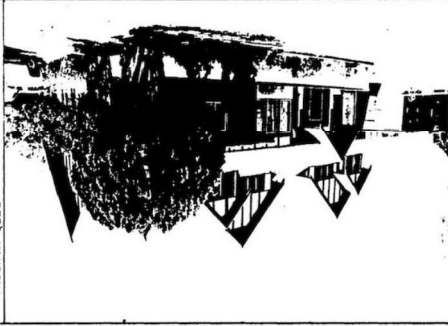
1. **Exterior brick** – In remarkably good condition, with artistic patterns around doors and windows, and a quaint perimeter wall around the porches (one section needs replaced).
2. **Corbelled brick chimneys** – One larger, one smaller, in good condition with minor needed repairs.
3. **Numerous steep gables** – All appear to be in good condition, other than a needed roof replacement.
4. **Original diamond-paned windows** – Some original windows remain fully intact. Others have had the glass replaced (without diamond panes). Many other windows (e.g., the upstairs dormer windows) have been replaced with cheap aluminum alternatives.
5. **Original doors** – The front exterior door is original and in need of refinishing. Four other exterior doors are either missing or have been replaced with cheap alternatives.
6. **Half-timbering** – Still present at each of the gables, but much of the wood is damaged and in need of repair or replacement.
7. **Additions** – There are two large additions on the front corners of the house (ca. 1940s, 1970s, 1980s) which have little sympathy for the original design. Fortunately, the additions do not appear to have significantly altered the original façade of the house—brickwork, doorways, etc. are still visible underneath and appear to be in good condition.

# Historic Property Inventory Form

We've attached the form as Appendix G.

## ARIZONA STATE HISTORIC PROPERTY INVENTORY

HISTORIC PROPERTY NAME		COUNTY	INVENTORY NO.
COMMON PROPERTY NAME		Maricopa	KA-73 (S)
PROPERTY LOCATION-STREET & NO.		QUAD/COUNTY MAP	
303 West Willetta		Phoenix Quad	
CITY, TOWN/VICINITY OF	ASSESSOR'S PARCEL NO.		
Phoenix	111-31-48		
OWNER OF PROPERTY Community	PHONE		
Foundation for Mental Health	257-1271		
STREET & NO./P.O. BOX			
303 West Willetta			
CITY, TOWN	STATE	ZIP	
Phoenix	Arizona	85003	
FORM PREPARED BY	DATE		
Gerald A. Doyle & Associates	August 1982		
STREET & NO./P.O. BOX	PHONE		
4331 North 12th Street	264-3082		
CITY, TOWN	STATE	ZIP	
Phoenix	Arizona	85014	
PHOTO BY	DATE		
Don Hering	July 1982		
VIEW			
Toward SE			
HISTORIC USE			
Single family residence			
PRESENT USE	ACREAGE		
Half-way house	Less/Acre		
ARCHITECT/BUILDER			
Leighton G. Koipe			
CONSTRUCTION/MODIFICATION DATES	1935, 1938		
Const. ca. 1913, modified/1940, 1945, 1955			



**PHYSICAL DESCRIPTION**

The large, one-and-one-half story house at 303 West Willetta is one of the architecturally significant houses in the area. A Tudor Revival style house, it was constructed about 1913 and subsequently underwent numerous modifications, some of which were accomplished with little sympathy for the original design. Fortunately, the changes that have occurred over the years are reversible and do not appear to have irreparably damaged the basic historic fabric of the building.

The massing of the house consists of a great, high-pitched gabled roof with two sets of dormers. A wing at the east end is covered by an off-set gabled roof. The large dormers are comprised of an off-set gable arrangement. Each stuccoed gable features half-timbering, a louvered ventilator, and casement windows with diamond panes. This same motif is carried throughout the walls of the house and is interspersed with panels or wainscot made of bricks. A massive corbelled chimney towers above the highest roof ridge. The house takes advantage of its corner lot to show off its collection of gables.

## Photographs

The following pages include labeled color photographs showing the overall site, street views, all exterior façades, close-up views of original/decorative features, and areas where work is to be performed. We have not included interior photos since our request does not include interior work.



## Summary of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

New period-appropriate diamond windows  
Original window repair and restoration  
Exterior door replacement to match original

### Roof Repairs/ Replacement

Full roof replacement on main structure  
Flat roof repair on south side

### Exterior Woodwork Repairs

Half-timbering repair/replacement

### Masonry Repairs

Various brick repairs

### Demolition of

### Non-Historic Additions

Carefully remove non-original additions to restore front façade

### Porch and Step Rehabilitation

Replace missing section of front walkway

### Stucco Repairs

Various stucco repairs



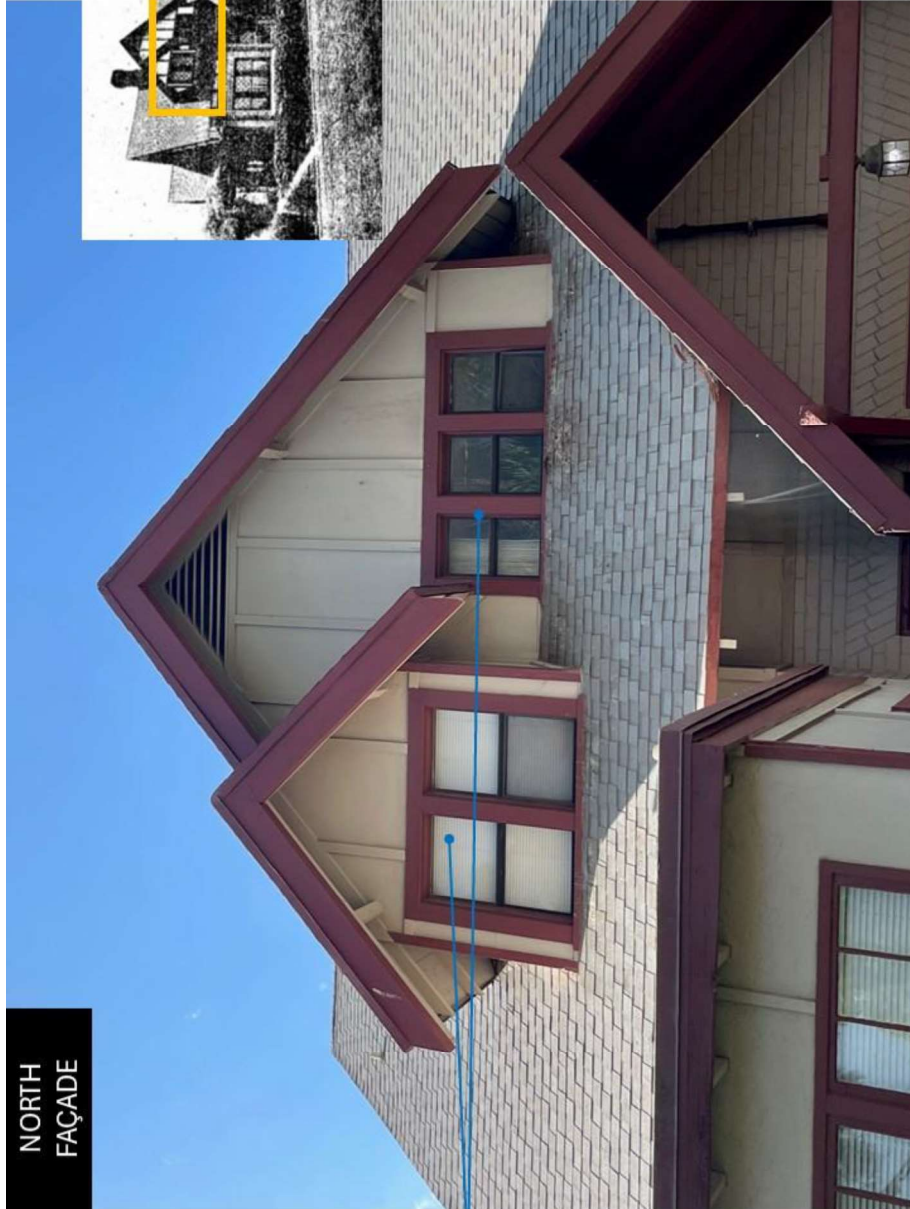


Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to match the original

NORTH  
FAÇADE

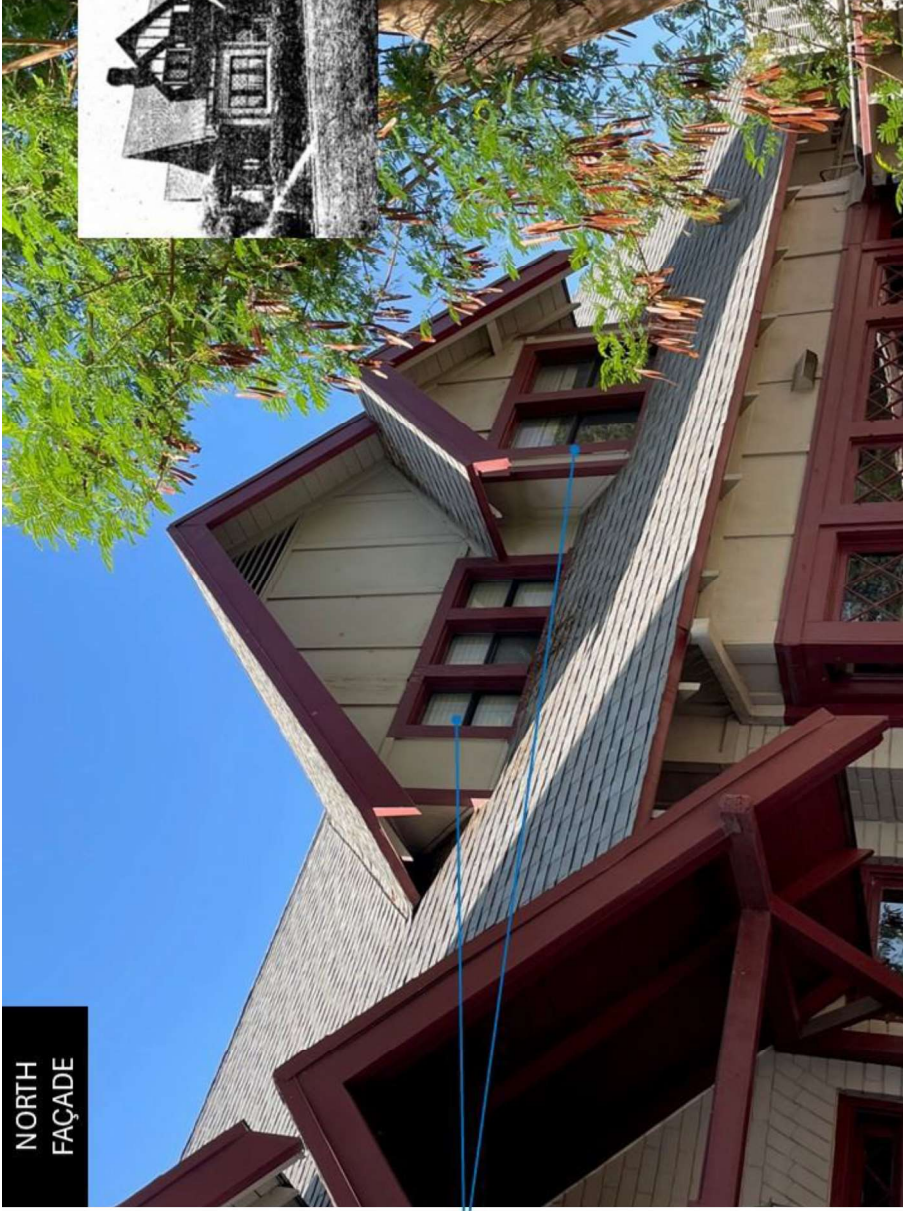


Replace  
missing  
original  
windows

Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to match the original



NORTH  
FAÇADE

Replace  
missing  
original  
windows

Category of Eligible Work

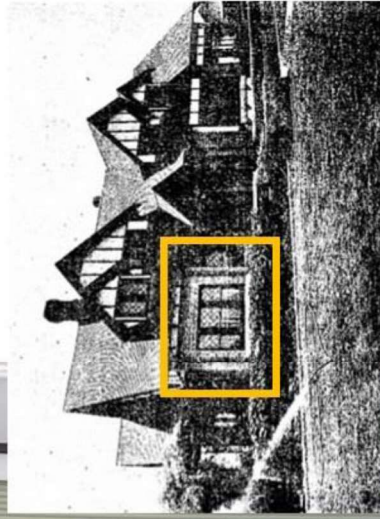
### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to  
match the original



NORTH FAÇADE

Replace  
missing  
original  
three  
windows





Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to  
match the original



WEST FAÇADE

Replace  
missing  
original  
window



Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to  
match the original



WEST FAÇADE

Replace  
missing  
original  
windows

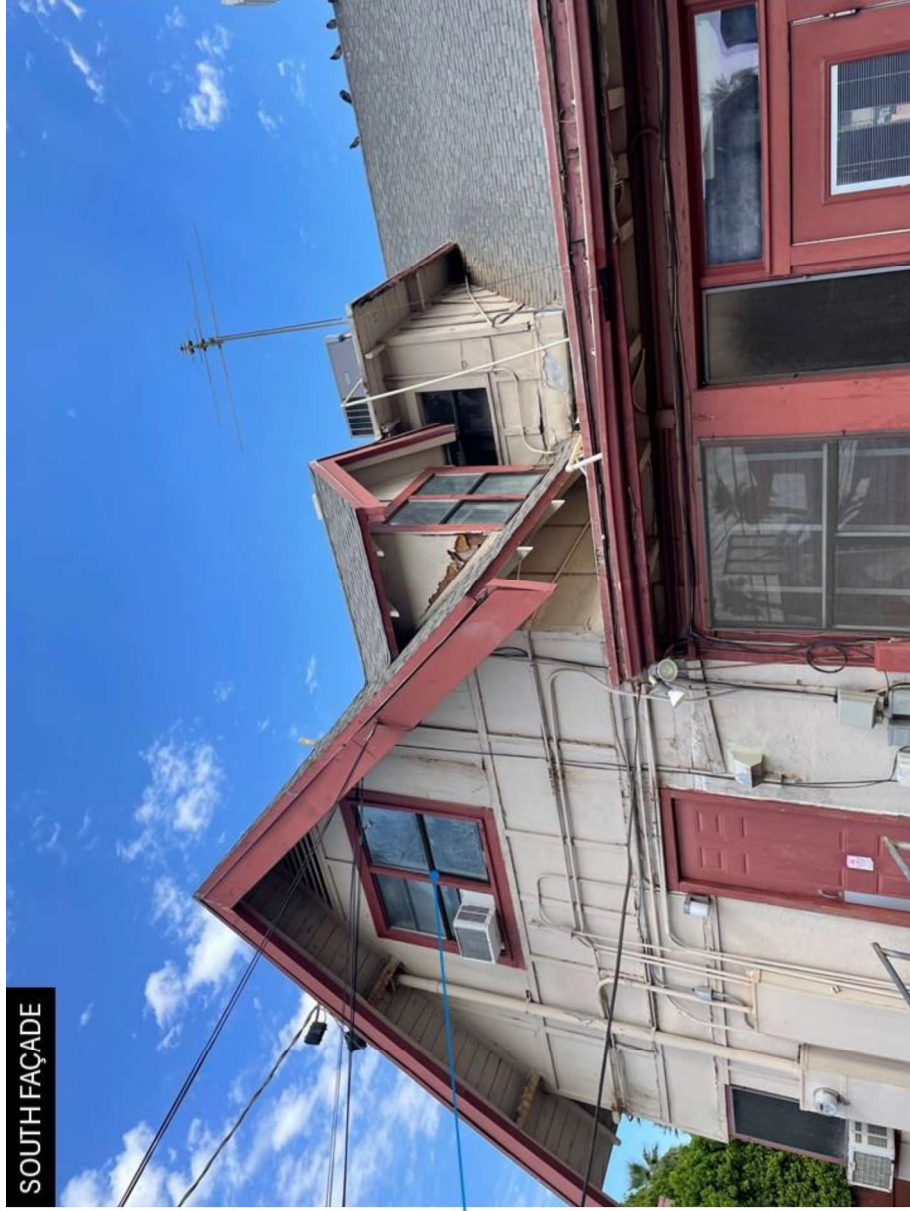
Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to  
match the original

Replace  
missing  
original  
window

SOUTH FAÇADE



Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to  
match the original



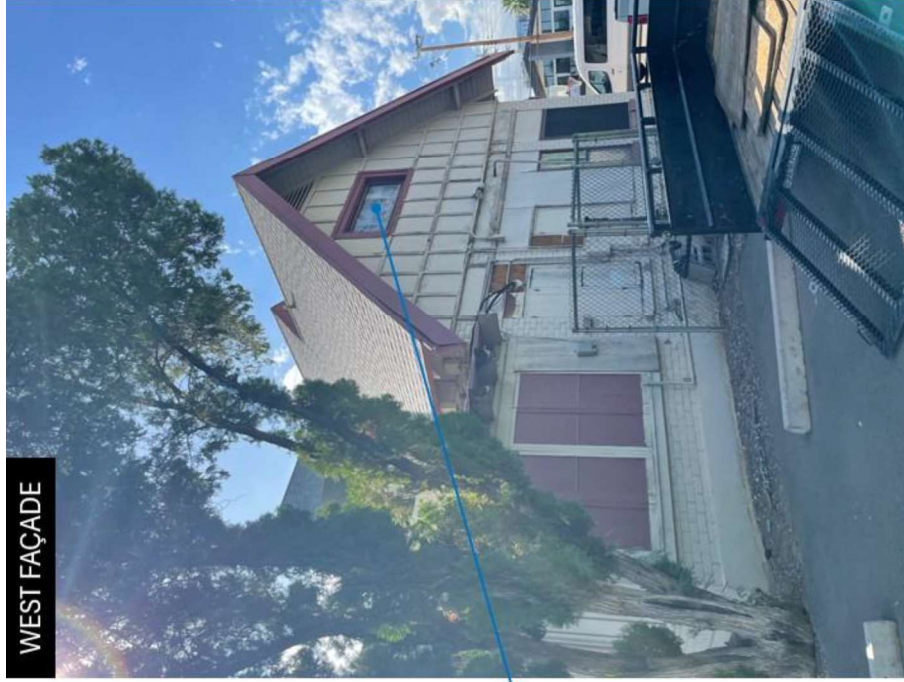
EAST FAÇADE

Replace  
missing  
original  
window

Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

22 new diamond windows to  
match the original



WEST FAÇADE

Replace  
missing  
original  
window



Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

Original window repair and restoration

Original window repair (replace diamond muntins)



Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

Original window repair and restoration



NORTH FAÇADE

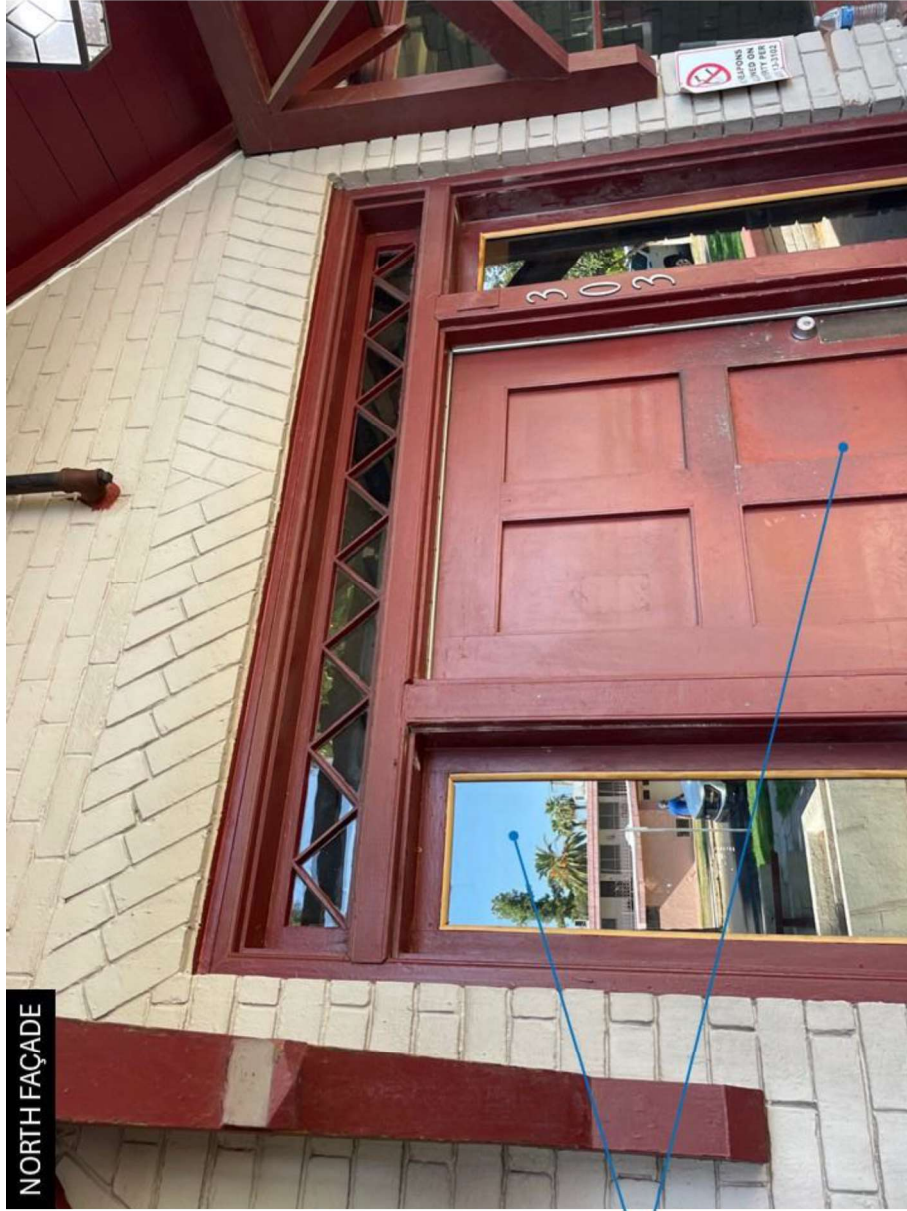
Original window repair (replace diamond muntins)

Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

Original window repair and  
restoration

NORTH FAÇADE



Original  
front door  
and  
window  
repair

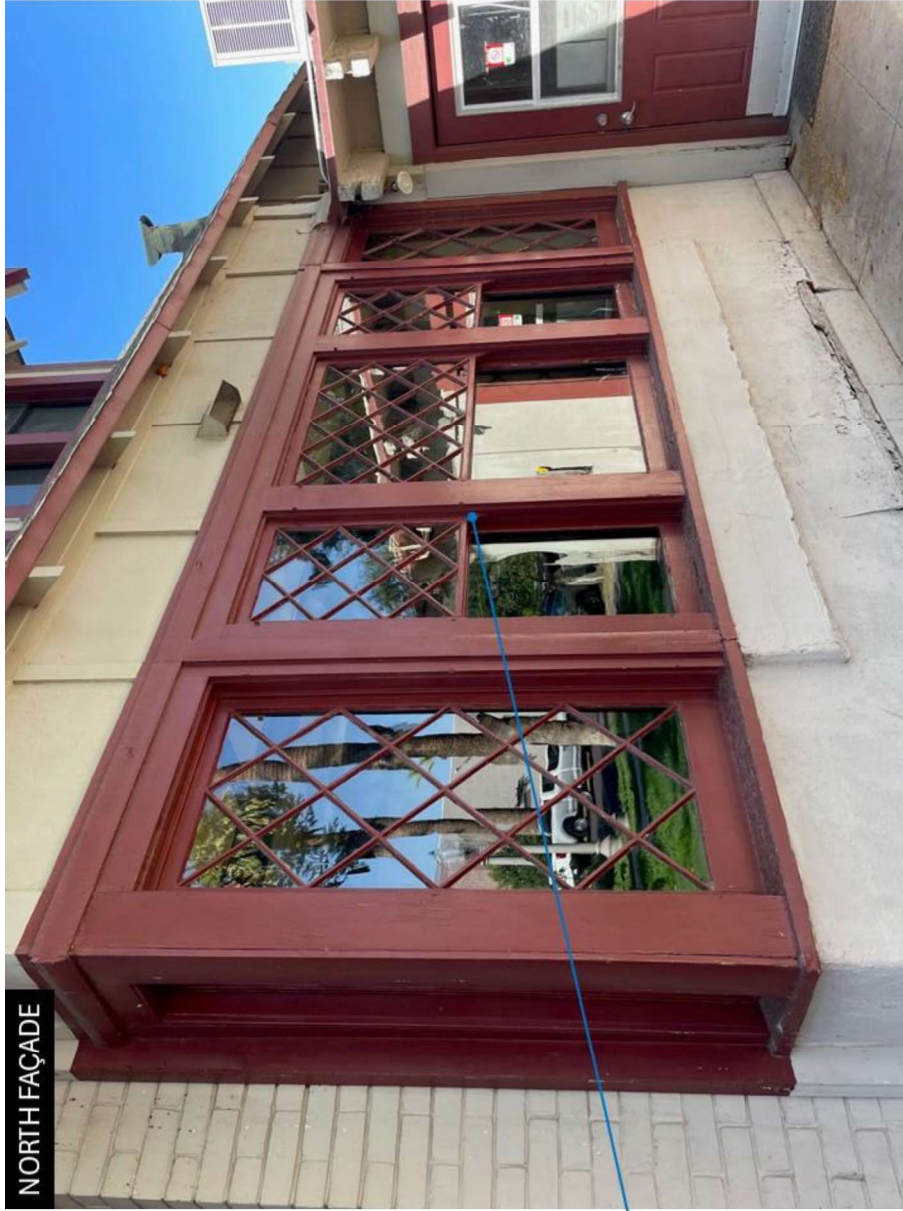


Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

Original window repair and restoration

NORTH FAÇADE



Original  
window  
repair



Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

Exterior door replacements to  
match original

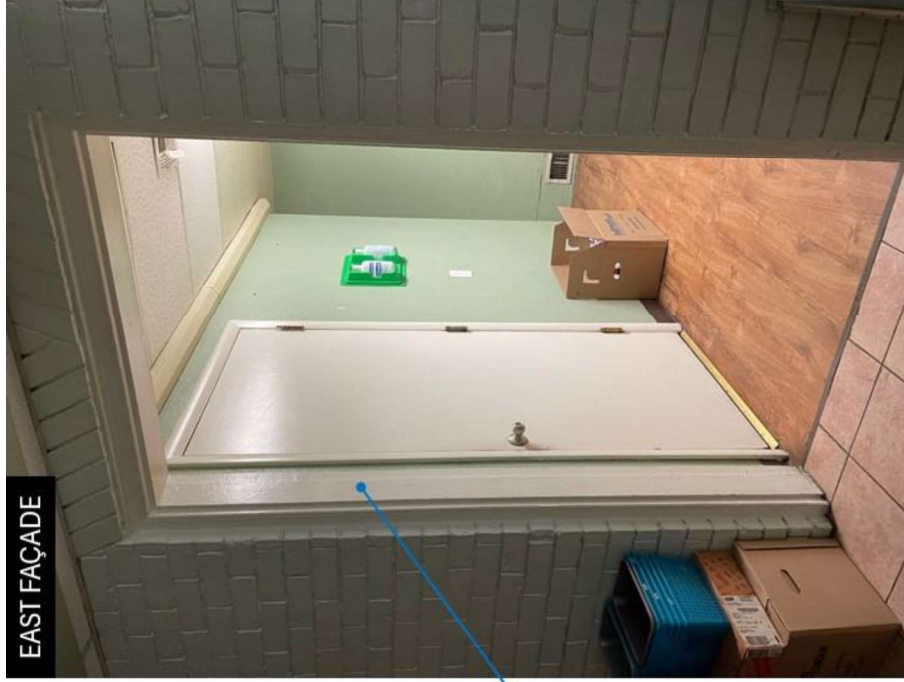


Replace  
missing  
original  
French  
doors  
(32")

Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

Exterior door replacements to  
match original



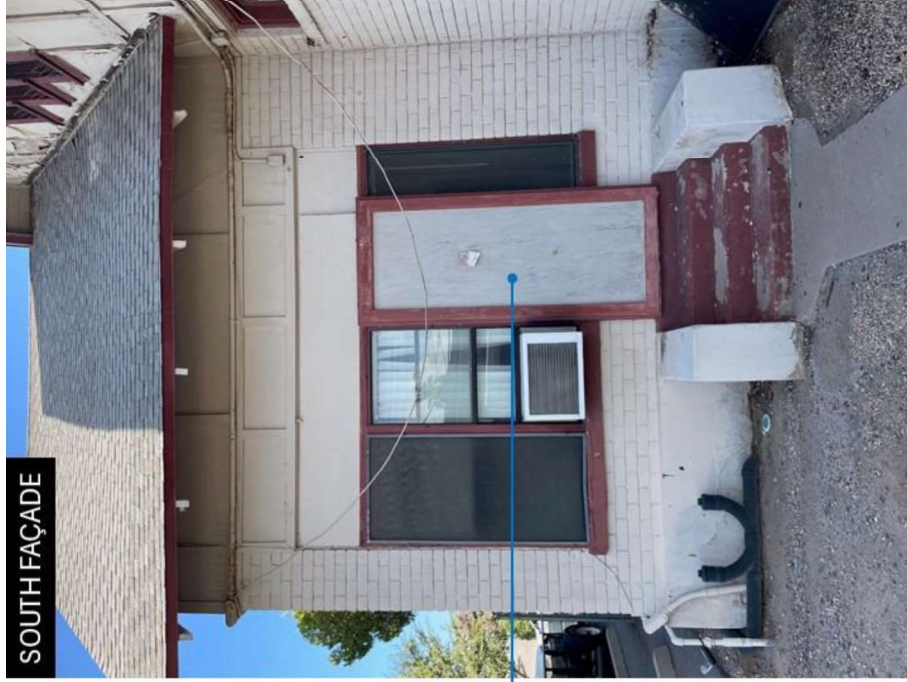
EAST FAÇADE

Replace  
missing  
original  
French  
doors  
(42")

Category of Eligible Work

### Repairs to Exterior Walls, Doors, Windows

Exterior door replacements to  
match original



Replace  
missing  
original  
door

Category of Eligible Work

**Roof Repairs/  
Replacement**

Full roof replacement on  
main structure

EAST FAÇADE



Replace  
damaged  
roof



Category of Eligible Work

**Roof Repairs/  
Replacement**

Full roof replacement on  
main structure

SOUTH FAÇADE



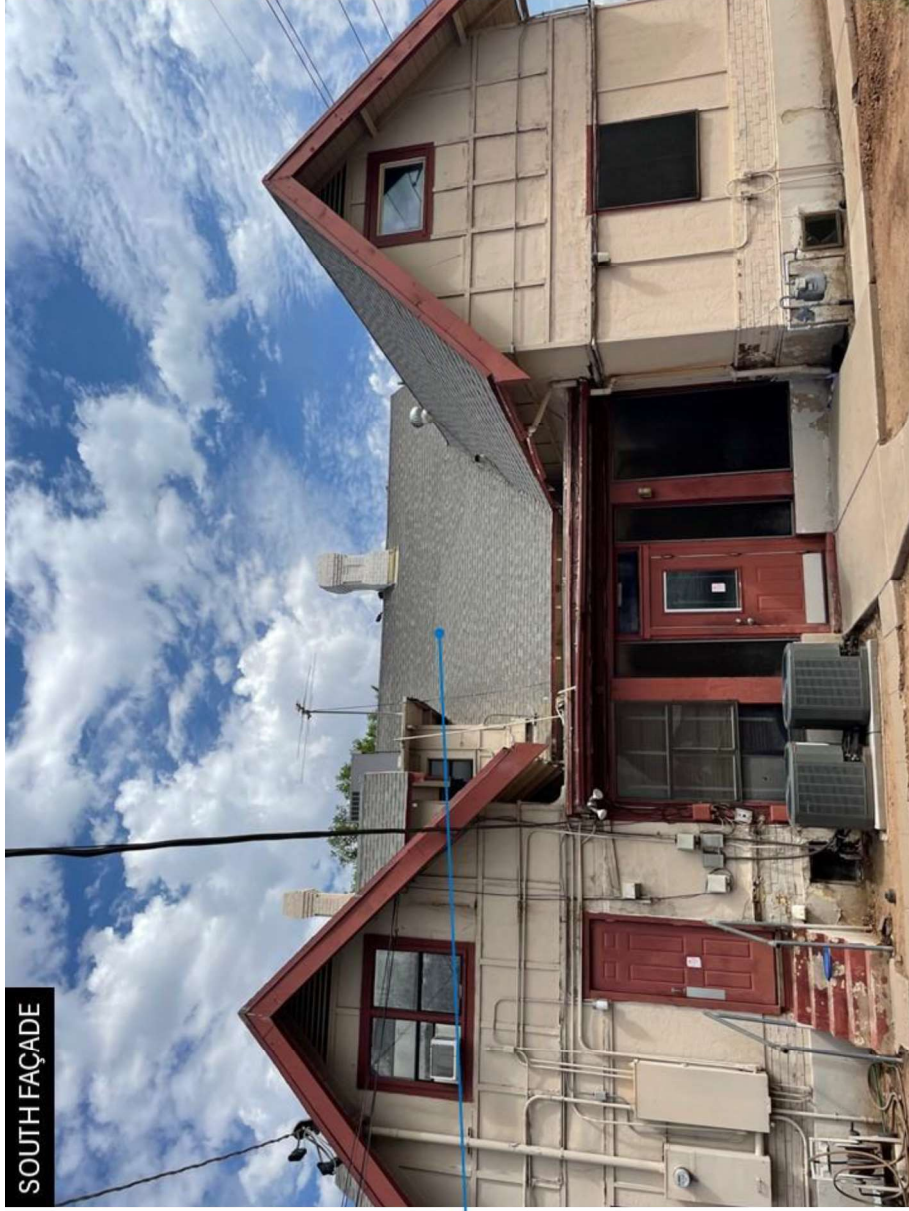
Replace  
damaged  
roof

Category of Eligible Work

**Roof Repairs/  
Replacement**

Full roof replacement on  
main structure

SOUTH FAÇADE



Replace  
damaged  
roof

Category of Eligible Work

**Roof Repairs/  
Replacement**

Repair of south side  
flat roof

SOUTH FAÇADE



Replace  
damaged  
flat roof

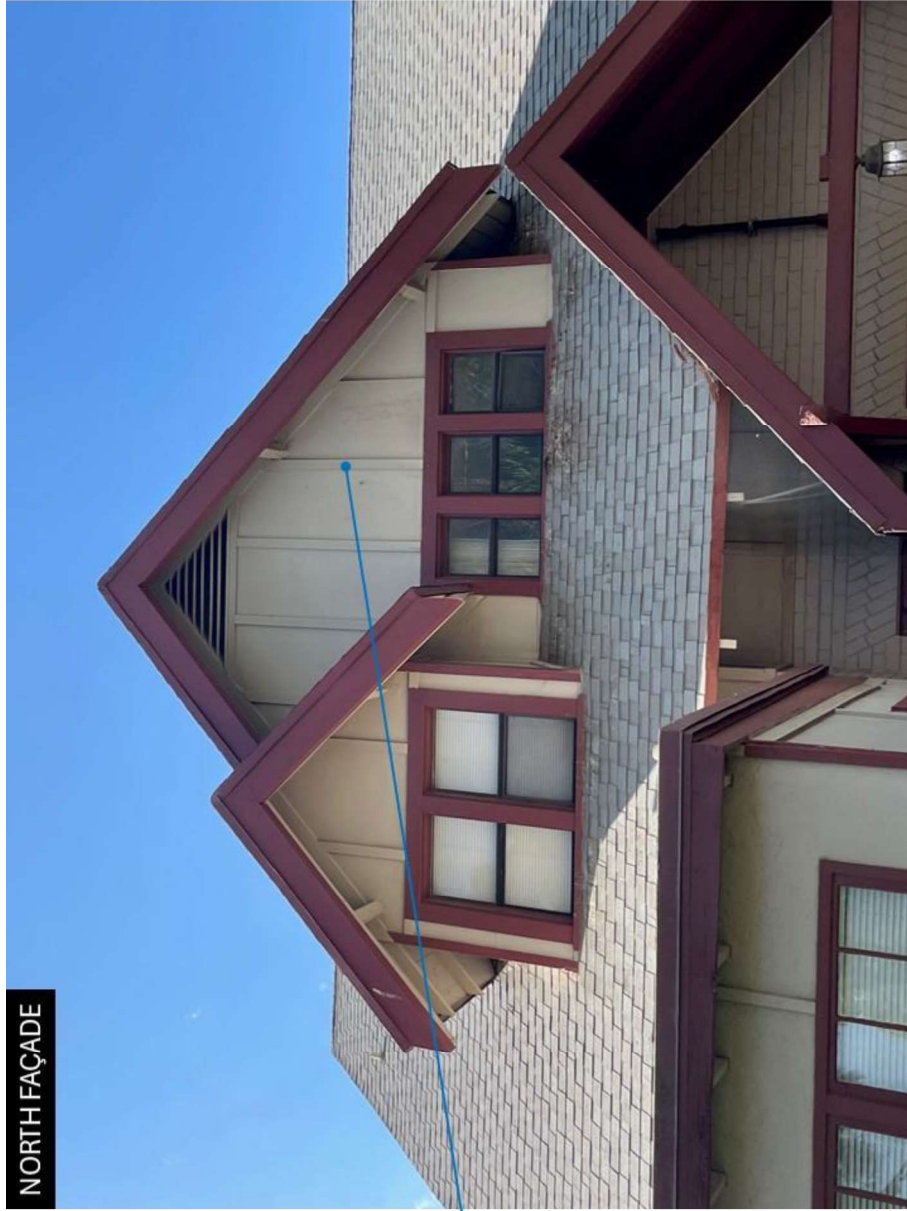


Category of Eligible Work

### Exterior Woodwork Repairs

Half-timbering repair/  
replacement

NORTH FAÇADE



Repair  
original  
half-  
timbering



Category of Eligible Work

### Exterior Woodwork Repairs

Half-timbering repair/  
replacement



NORTH FAÇADE

Repair  
original  
half-  
timbering

Category of Eligible Work

## Exterior Woodwork Repairs

Half-timbering repair/  
replacement



SOUTH FAÇADE

Repair  
original  
half-  
timbering

Category of Eligible Work

**Masonry**

**Repairs**  
Various brick  
repairs



WEST FAÇADE

Replace  
missing /  
damaged  
brick

Category of Eligible Work

**Masonry**

**Repairs**  
Various brick  
repairs



SOUTH FAÇADE

Repair  
damaged  
brick



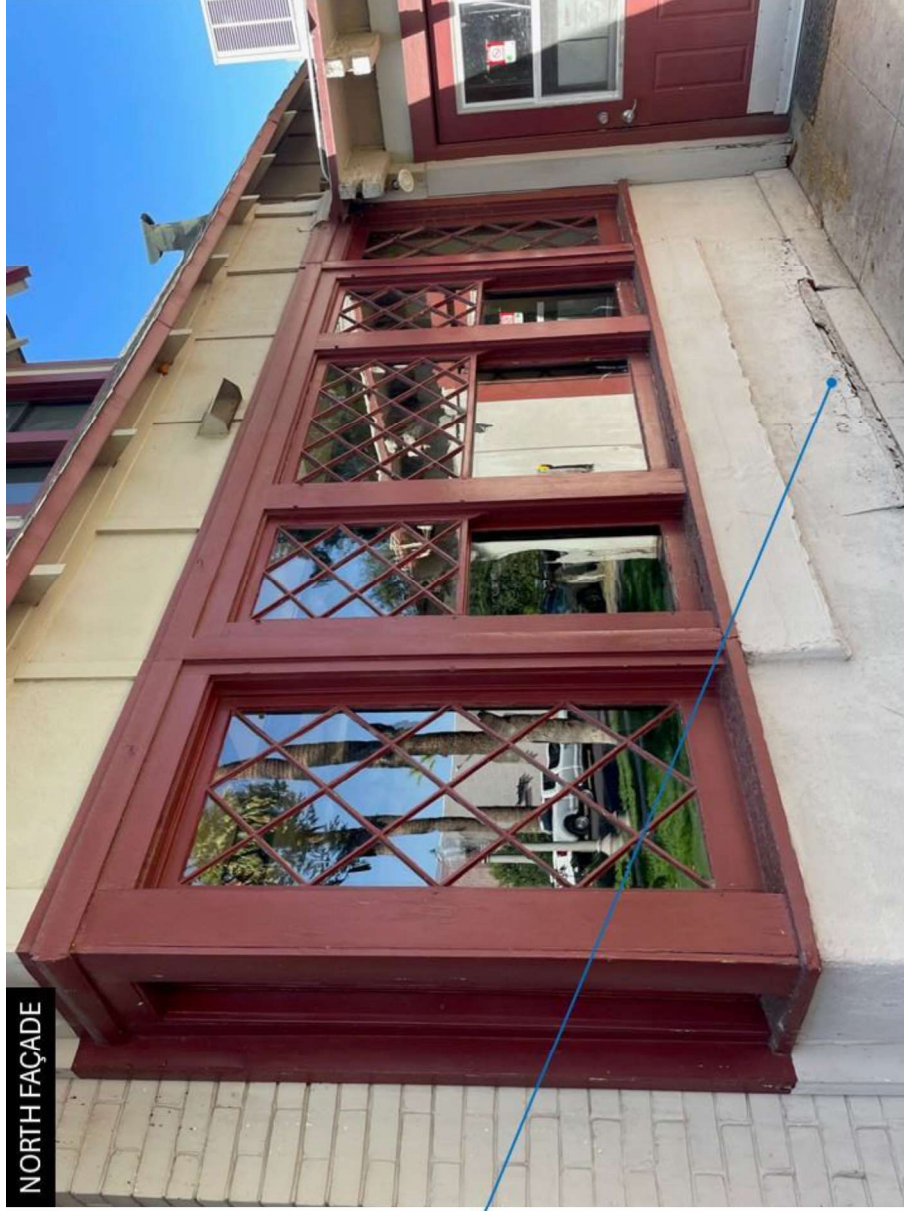
Category of Eligible Work

**Stucco**

**Repairs**

Various stucco repairs

NORTH FAÇADE



Repair  
damaged  
stucco

Category of Eligible Work

### Stucco

#### Repairs

Various stucco repairs



WEST FAÇADE

Repair damaged stucco



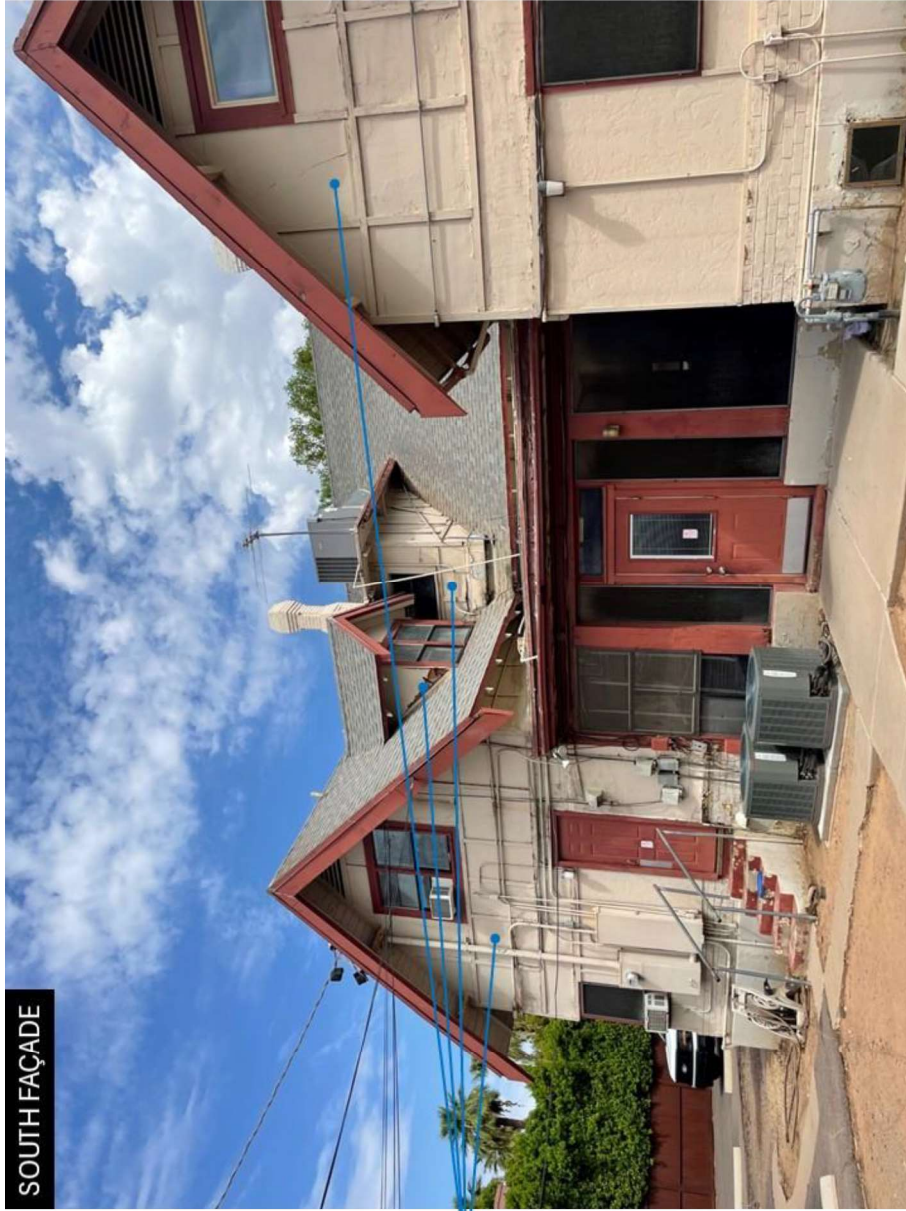
Category of Eligible Work

**Stucco**

**Repairs**

Various stucco repairs

SOUTH FAÇADE



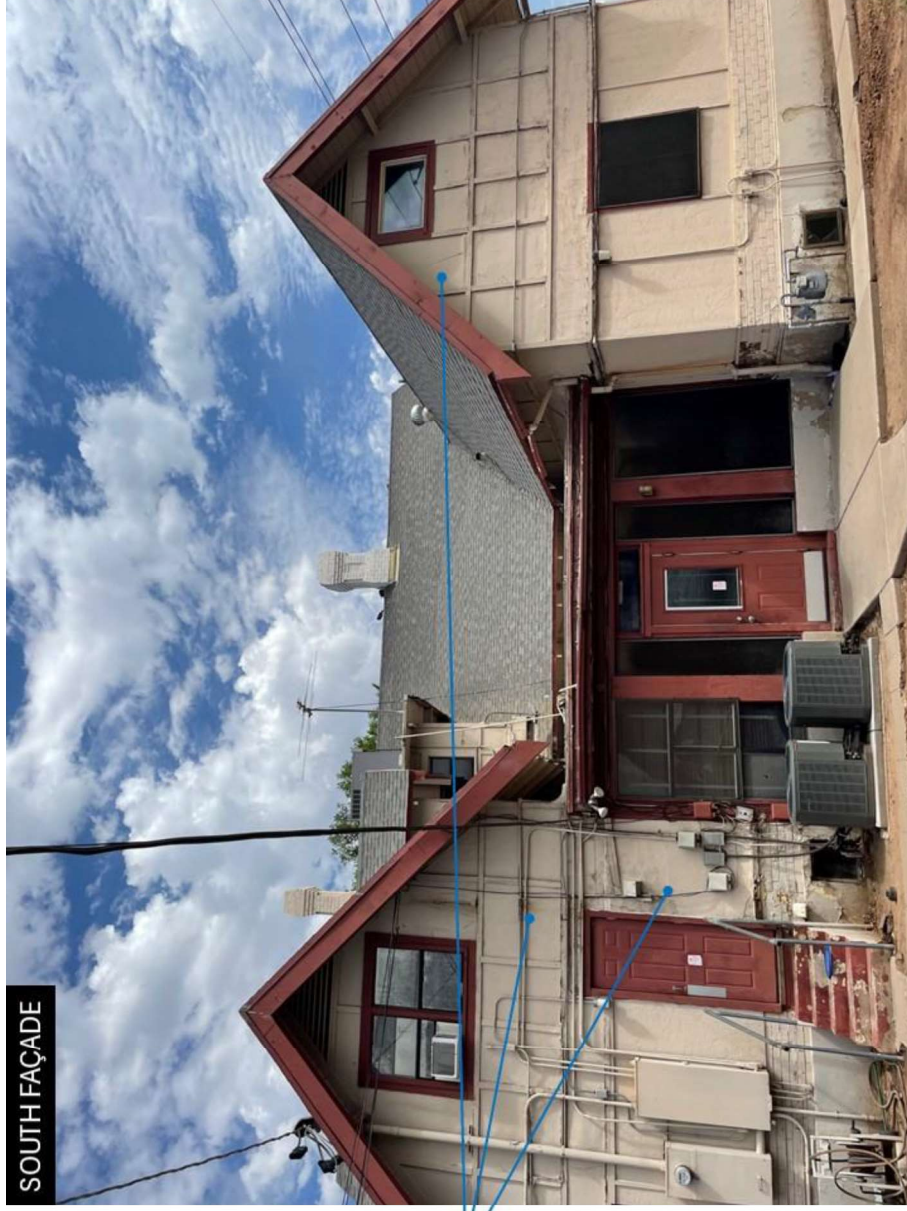
Repair damaged stucco

Category of Eligible Work

**Stucco**

**Repairs**

Various stucco repairs



SOUTH FAÇADE

Repair damaged stucco



Category of Eligible Work

### Porch and Step Rehabilitation

Replace missing section of front porch wall



NORTH FAÇADE

Replace missing original porch wall

Category of Eligible Work

### Demolition of Non-Historic Additions

Carefully remove non-original additions to restore front façade



NORTH FAÇADE

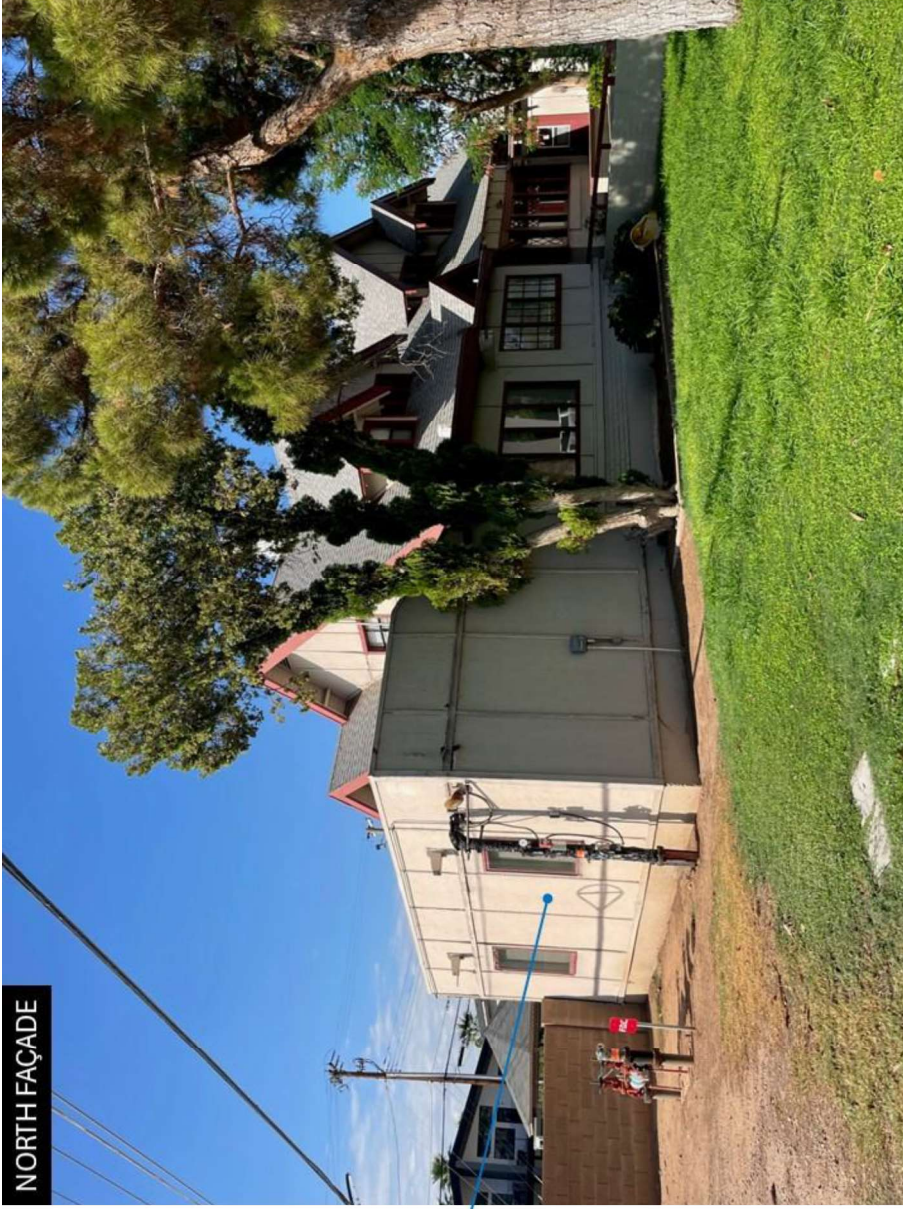
Remove non-historic addition



Category of Eligible Work

### Demolition of Non-Historic Additions

Carefully remove non-original additions to restore front façade



NORTH FAÇADE

Remove  
non-  
historic  
addition

Category of Eligible Work

### Demolition of Non-Historic Additions

Carefully remove non-original additions to restore front façade

NORTH FAÇADE



Remove non-historic addition

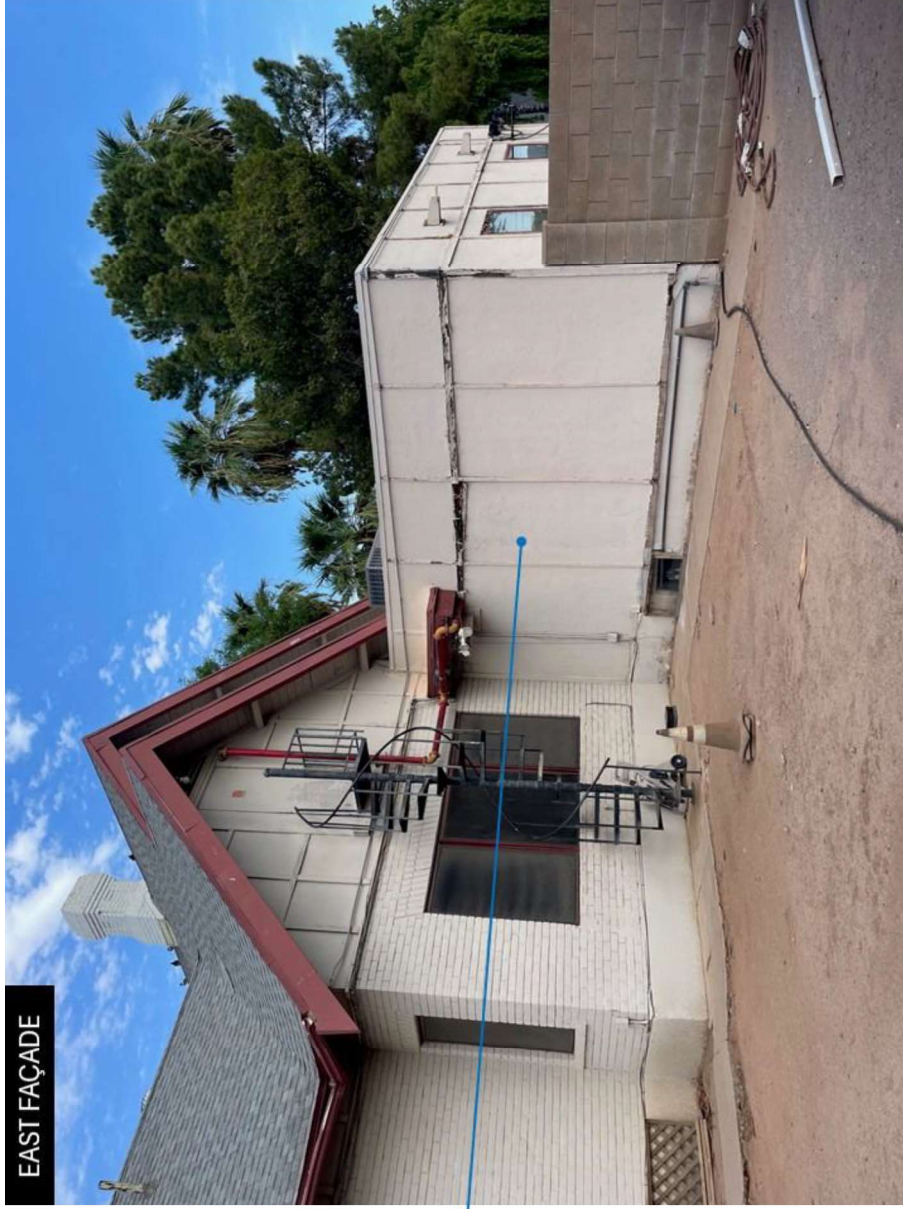


Category of Eligible Work

### Demolition of Non-Historic Additions

Carefully remove non-original additions to restore front façade

EAST FAÇADE



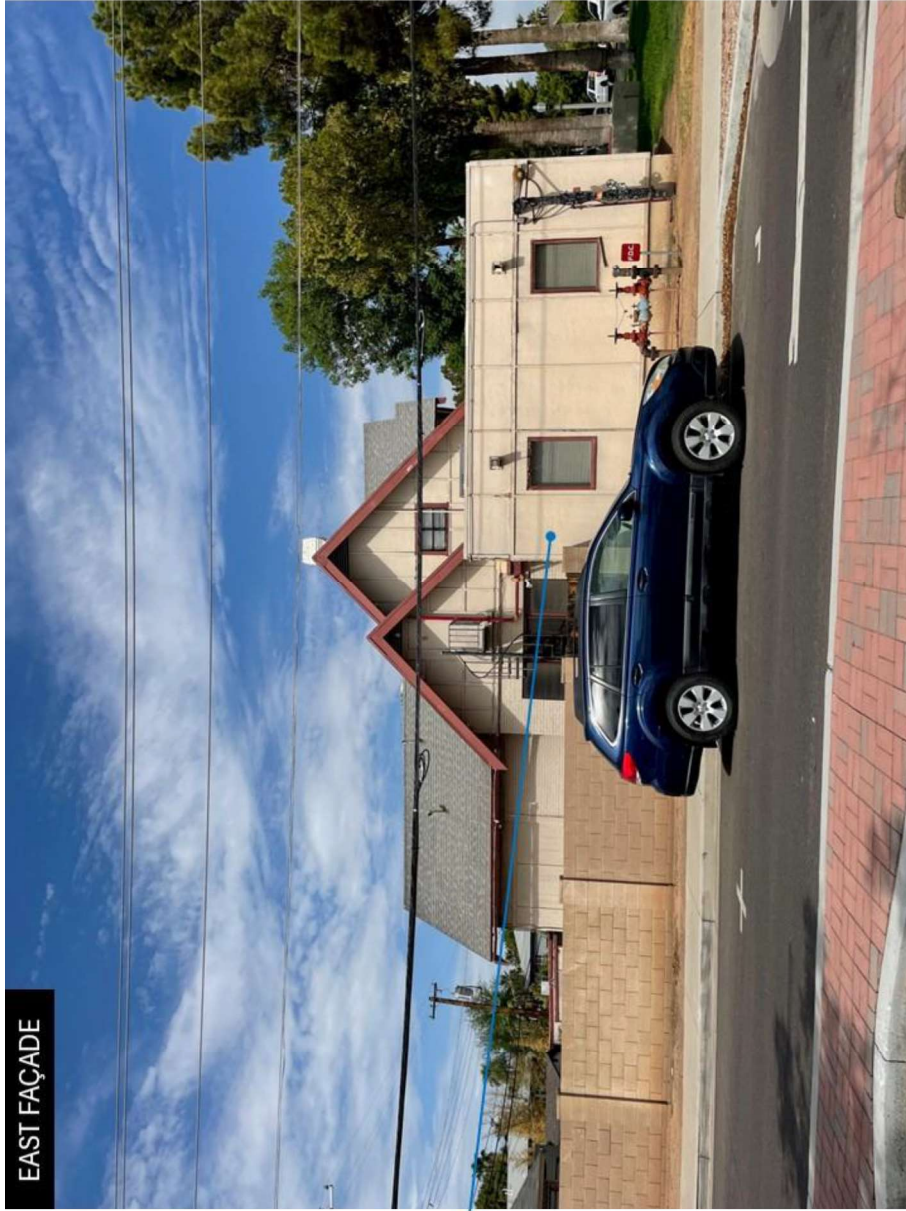
Remove non-historic addition

Category of Eligible Work

### Demolition of Non-Historic Additions

Carefully remove non-original additions to restore front façade

EAST FAÇADE

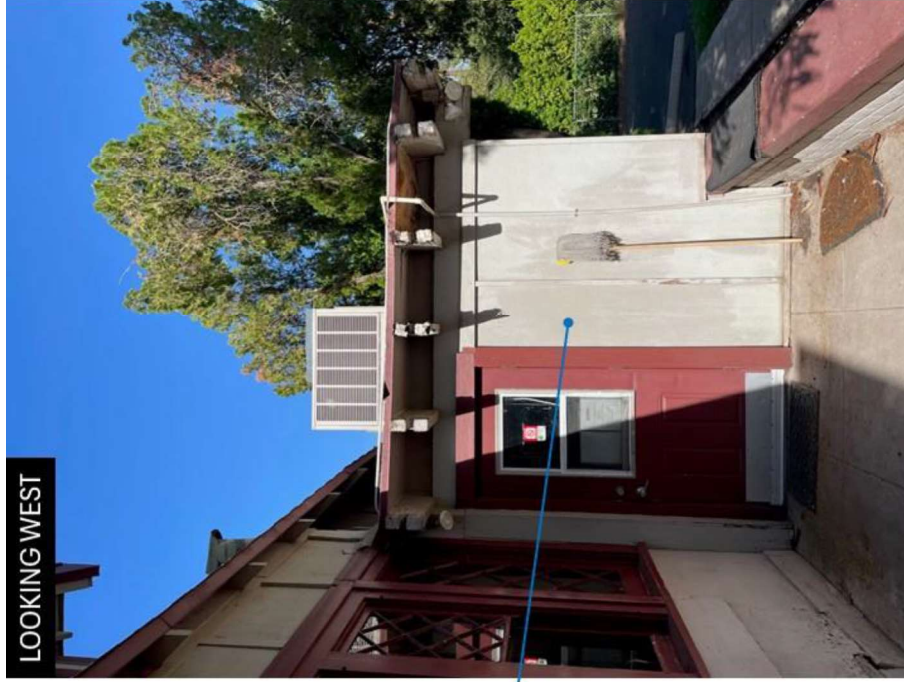


Remove  
non-  
historic  
addition

Category of Eligible Work

### Demolition of Non-Historic Additions

Carefully remove non-original additions to restore front façade



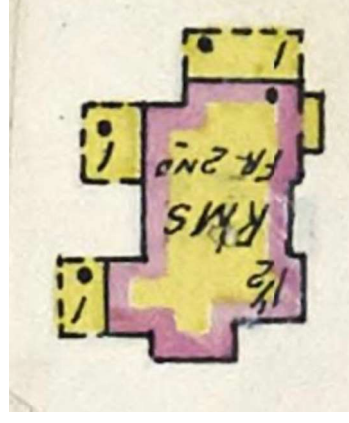
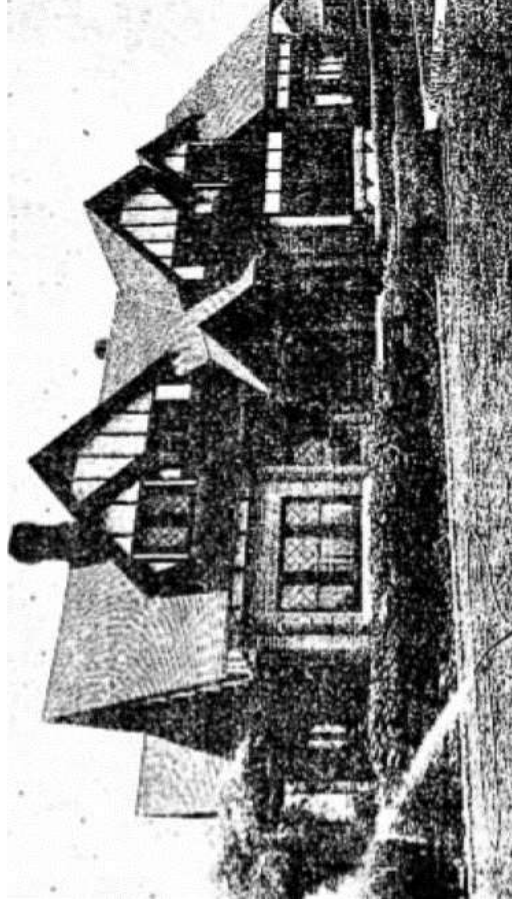
Remove non-historic addition



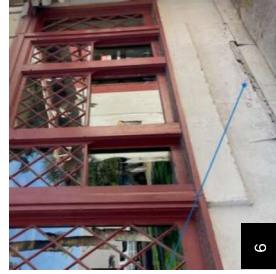
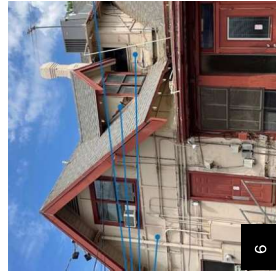
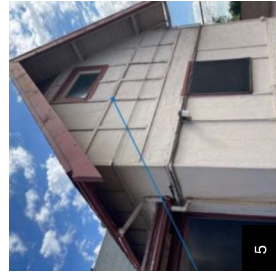
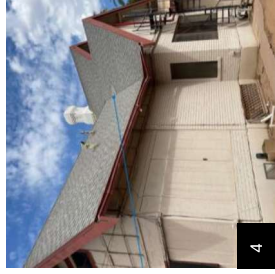
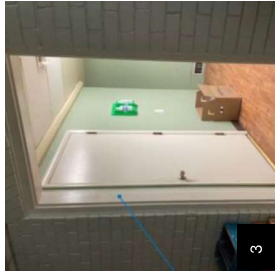
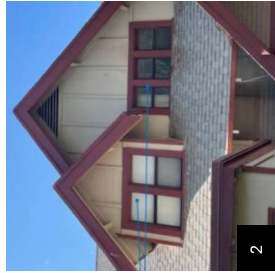
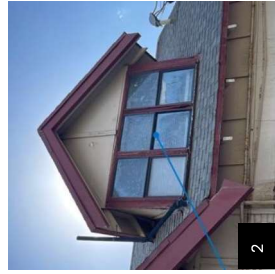
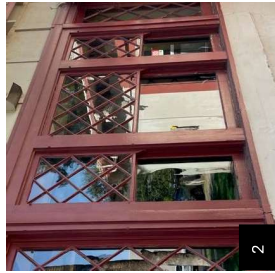
# Property Condition

## A Historic Gem in Need of TLC

Based on our observations and the various professional inspections we've conducted, the house is in very good structural condition. This is no surprise, as one of Mr. Knipe's signature design preferences was to protect main structures from heat and water through the use of exterior porches and concrete perimeter walls<sup>1</sup>. However, the mechanical components need to be almost completely redone, and the cosmetic elements of the house show years of deferred maintenance. The woodwork, stucco, roof, windows, and doors are all in fair to poor condition and in need of repair or replacement.



<sup>1</sup> *Arizona Republican*, "Pretty Centre St Home Just Completed," November 8, 1908



Here is a summary of the condition of the exterior elements:

1. **Exterior brick** – In remarkably good condition, with only a couple of observable areas where repair is necessary.
2. **Original windows** – The original windows are in need of repair where they are broken and/or inoperable. Where windows have been replaced with cheap aluminum alternatives, we hope to replace them with replicas of the original diamond-pane window style.
3. **Original doors** – The front exterior door is original and in need of refinishing. Four other exterior doors are either missing or have been replaced with cheap alternatives.
4. **Roof** – The comp shingle roof is aged and in need of replacement, as evidenced by multiple roof leaks, which are visible from the interior. The original rear patio has been enclosed with a flat roof, which is also in need of replacement.
5. **Half-timbering** – Still present at all of the gables, but some of the wood is deteriorating and in need of repair.
6. **Stucco** – At the gables, enclosed screened-in porches, and other areas, the stucco shows much wear and tear and is in need of repair.



## Previous Rehabilitation Work

We have not begun any rehabilitation work of our own on the property. In the past, much work has been done to the property, some of which has negatively impacted its historical character. We have obtained and reviewed all the building permits on file with the City of Phoenix, and here is a summary of the major permitted work:

- 1935 – “All interior work”
- 1936 – “Glass in porch”
- 1938 – “Addition to rooming house”
- 1938 – “Glass in 12 feet of porch and additional plumbing”
- 1940 – “Glass in sleeping porch of rooming house”
- 1944 – “Glass in part of front porch”
- 1945 – “16 x 18 addition used as guest house”
- 1945 – “Frame addition adjoining bedroom”
- 1955 – “8 x 8.5 frame kitchen add to front of residence”
- 1975 – “Remodel interior of first floor to move kitchen and relocate three bedrooms”
- 1975 – “New 400-amp service”
- 1983 – “Remodel of recovery home and addition of office”
- 2015 – Students from Phoenix College remodeled the main living spaces as a community service project; unfortunately, at this time the original hardwood floors were covered with layers of plywood and cheap vinyl

Additionally, we’ve learned the house was divided up into many smaller bedrooms in the late 1920s when it was converted to a guest house/boarding house.

APPLICATION FOR PERMIT TO BUILD, PHOENIX, ARIZONA

Permit No. **7722**  
 Date of Permit **1/23/36**  
 Name of Applicant **Effie L. Mudge**  
 Address **303 W Willetta**  
 City **Phoenix**  
 State **Arizona**

Trade **10**  
 Description of Building **Glass in porch**  
 Description of Work **Glass in porch**  
 Details of No. Per. to Build

Permit Fee **2.00**  
 Name of Contractor **I. T. Gray**  
 Address **12th St. & Broadway**  
 City **Phoenix**  
 State **Arizona**

Permit Checked by **A.**  
 Through Approved by **I. T. Gray**

STREET **W. Willetta** NO. **303**  
 NAME **Opeltis M. Mudge** CASE NO. **945-45**  
 DATE **August 27, 1946** PAR NO. **1/2**  
 DIST. USE **Res. B.**  
 SUBJECT **addition to residence used as guest house**

APPEARANCES - Applicant **I. T. Gray**  
 APPEARANCES - Opposition **None**  
 ACTION OF BOARD **Approved**

APPLICATION FOR PERMIT TO BUILD, PHOENIX, ARIZONA

at No. **303 W Willetta** Phoenix, Arizona  
 The name **Out**  
 No. **9-10** Address **Kenilworth**  
 Name **Orville & Effie Mudge**  
 No. of Occupants **Same**  
 Nature of Building **Glass in 12' of Porch**  
 and additional plumbing  
 and additional plumbing  
 City of Phoenix, Arizona

Permit No. **7722**  
 Date of Permit **1/23/36**  
 Name of Applicant **Effie L. Mudge**  
 Address **303 W Willetta**  
 City **Phoenix**  
 State **Arizona**

Permit Checked by **A.**  
 Through Approved by **I. T. Gray**

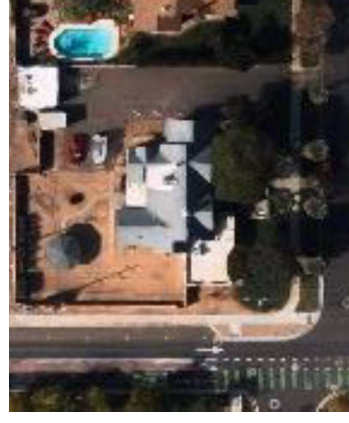
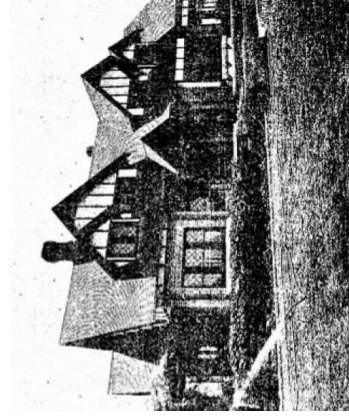
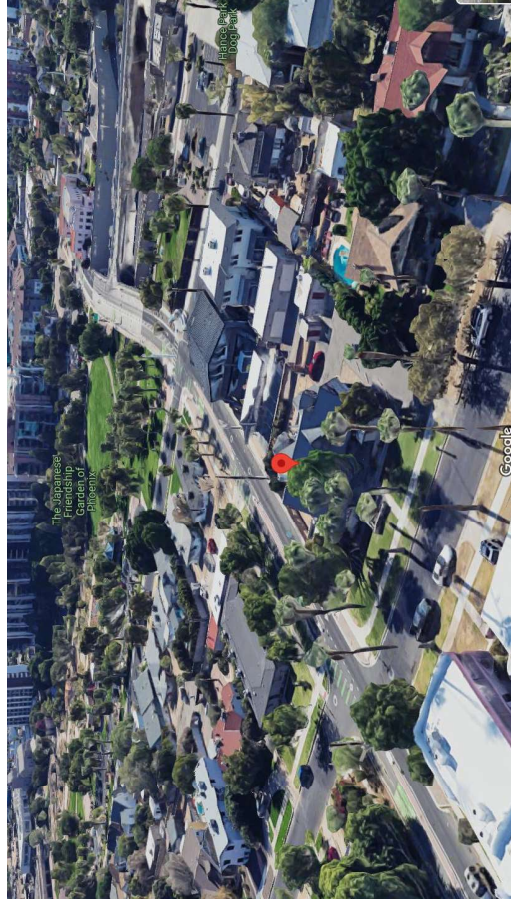
# Project Purpose

## A Crystal-Clear Vision

We have a simple three-fold vision to:

1. **Save and restore** the original beauty of the George H. Lutgerding House
2. **Add historic value to the Roosevelt neighborhood** and surrounding community
3. **Maximize the City's investment** by becoming one of its biggest Threatened Building success stories

On the interior, we hope to establish a floor plan—within the original footprint of the structure—that accommodates an upstairs/downstairs duplex with two large units (~2,500 sq. ft. downstairs, 2,000 sq. ft. upstairs), where our family would occupy one of the units as our primary residence. We have lived in the Roosevelt neighborhood for over four years previously and are very much looking forward to reestablishing ourselves there.

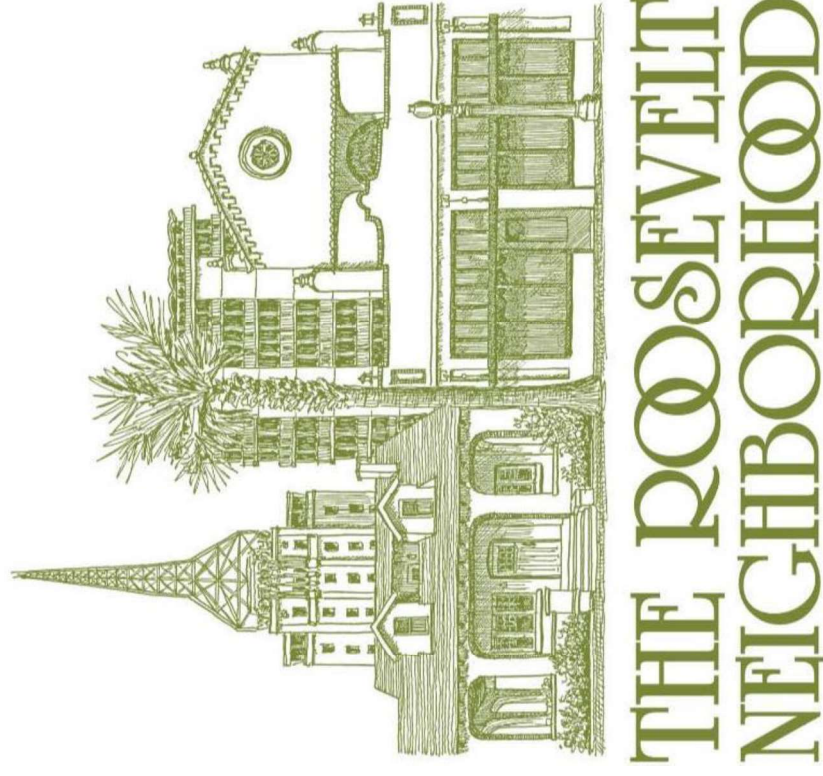


# Contribution to Community Goals

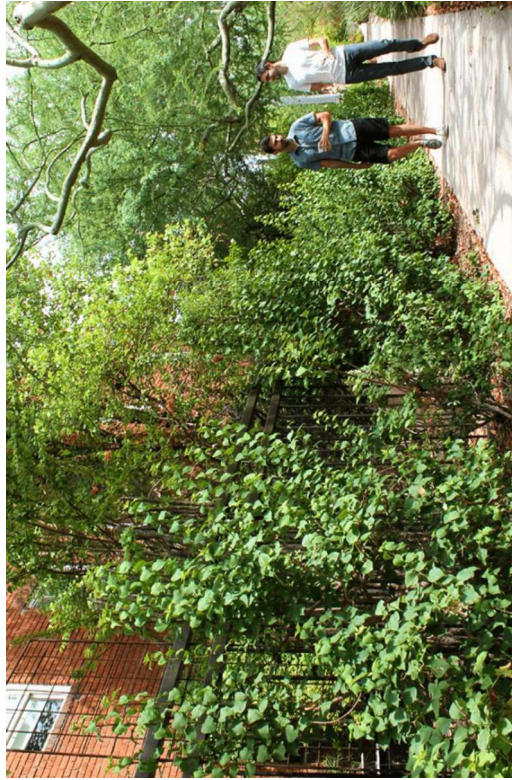
## Helping Roosevelt Flourish

“The Roosevelt Neighborhood is part of burgeoning Downtown Phoenix. The Historic District was the first designated historic neighborhood in the city. With walkable streets, a storied past, successful long-time businesses, and vibrant new restaurants and cafes, the Roosevelt Neighborhood offers a unique slice of Phoenix life — past, present and future.”

In tackling a complete restoration of a prominent structure in the heart of Roosevelt North—**carefully bringing it back to what it used to be**—we believe our project perfectly aligns with the values of the neighborhood and the City’s overall preservation and conservation goals!







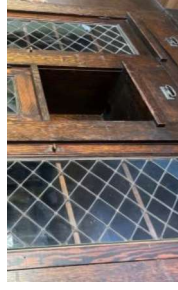
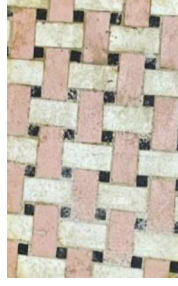
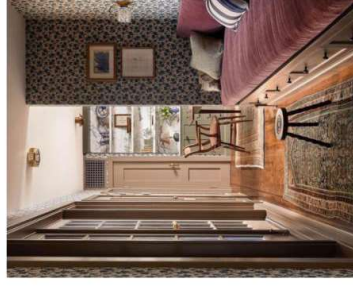
As part of our planning for this project, we have coordinated with the **Roosevelt Action Association**, whose mission is to “support Phoenix’s historic past by increasing awareness of its architectural and cultural history, to foster neighborhood pride, and to advocate for an extraordinary quality of life for future generations.” We’ve attached separately their letter of endorsement.

Additionally, we know that many residents of Roosevelt have long desired for 303 W Willetta to be converted from a group home to a family-occupied residential property. We have discussed our project plan with over a dozen current Roosevelt residents and all have expressed their excitement. For your consideration, we have obtained letters of support from several long-time and current Roosevelt residents, as well as one former resident. These letters are attached separately and demonstrate how our project will contribute to the community’s goals and values!

# Project Plan

## A Complete Restoration

The eligible exterior work for which we've applied fits seamlessly into our overall rehabilitation plan. We plan to complete all exterior, interior, and mechanical rehabilitation in one phase, with the goal of restoring the building to its original architectural character. While we await the City's decision on our grant application, we intend to start our work with planning, permitting, and non-eligible work items (interior, mechanical, landscaping, etc.).



Above: Our design inspiration for the overall restoration, including original maple floors and basketweave tile





# Project Work Scope, Budget, and Time Schedule

## Itemized Budget

Please see Appendix A for an itemized project list and budget for the entire proposed project (including items not to be funded with Historic Preservation grant funds).

Our budget demonstrates that the project items we are funding independently are equal or greater in dollar amount than those items in the grant request—in fact, they are more than double.

Threatened Building Application - Eligible Work		
Eligible Project Construction Items	Estimated Cost	Notes
Repairs to Exterior Walls, Doors, Windows	\$108,025	
22 like-for-like diamond windows to match original	\$31,965	Dubuque Window & Door Co. is our preferred supplier. Some banks of multiple windows are treated as "one" window in the estimate.
Original window repair and restoration	\$2,500	
Like-for-like exterior French door replacements to match original	\$5,238	33" for master - Dubuque Window & Door Co.
Like-for-like exterior French door replacements to match original	\$5,256	42" for front bedroom - Dubuque Window & Door Co.
Like-for-like exterior swing door replacement to match original	\$3,066	30" x 80" west side - Dubuque Window & Door Co.
<b>Roof Repairs/Replacement</b>	<b>\$31,975</b>	
Full roof replacement	\$31,975	
<b>Exterior Woodwork Repairs</b>	<b>\$9,500</b>	
Half-timbering repair/replacement	\$9,500	
<b>Masonry Repairs</b>	<b>\$4,500</b>	
Misc. brick repairs	\$4,500	
<b>Stucco Repairs</b>	<b>\$5,500</b>	
Misc. stucco repairs	\$5,500	
<b>Porch and Step Rehabilitation</b>	<b>\$10,000</b>	
At front walkway	\$10,000	
<b>Demolition of Non-historic Additions</b>	<b>\$30,000</b>	
Demo of front additions	\$30,000	
<b>A. Total Eligible Expenses</b>	<b>\$198,500</b>	

# Project Work Scope, Budget, and Time Schedule

## Descriptions of Work Items

Please see Appendix B for narrative descriptions of all itemized work items proposed for Historic Preservation grant funding.

<p><b>Tudor Revival   303 W Willetta</b></p> <p><b>Description of Eligible Work Items</b></p> <p><b>REPAIRS TO EXTERIOR WALLS, DOORS, WINDOWS</b></p> <p><b>New period-appropriate diamond windows (like-for-like replacement)</b></p> <p>22 original windows have been replaced over the years with cheap aluminum alternatives. Our plan calls for the like-for-like replacement of all inappropriately altered windows. The new windows will be wood and period-appropriate in design, including diamond muntins to match the existing original windows and based on historical photo evidence. Please refer to the Dubuque Window &amp; Door Co. estimate for a detailed breakdown of window sizes and specifications. Our application includes photo references.</p> <p><b>Original window repair and restoration</b></p> <p>The four windows adjacent to the front entry door had the original diamond muntins destroyed when the glass was replaced in early-2024. We intend to restore the original wood muntins to these four windows. Our application includes photo references.</p> <p><b>Exterior door replacement to match original</b></p> <p>Two sets of original, diamond-paned French doors were removed from the northeast side of the house, where the non-historic addition was constructed in the 1960s. The original door openings and hinge locations are still intact. Additionally, one regular swing door was removed on the west side of the house and boarded up. Our plan calls for the like-for-like replacement of these French door sets and swing door. The new doors will be wood and period-appropriate in design, including diamond muntins to match the original design based on historical photo evidence. Please refer to the Dubuque Window &amp; Door Co. estimate for a detailed breakdown of door sizes and specifications. Our application includes photo references.</p> <p><b>ROOF REPAIRS/REPLACEMENT</b></p> <p><b>Full roof replacement on main structure</b></p> <p>The composite shingle roof (and small section of flat roof on the south side) is aged and in need of replacement, as evidenced by many roof leaks (visible from the interior) and the opinion of multiple licensed contractors. We intend to replace the entire roof with a modern comp shingle material, color to be cohesive with the exterior paint color scheme.</p> <p><b>EXTERIOR WOODWORK REPAIRS</b></p> <p><b>Half-timbering repair/replacement</b></p> <p>The original wood half-timbering (a primary characteristic of the Tudor Revival architecture and visible in many historical photos of the house) is still present at the gables, however some of the wood is deteriorating and in need of repair. Our plan calls for the repair—and replacement, if necessary—of all damaged half-timbering. Our application includes photo references.</p>	<p>Appendix B</p>
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# Project Work Scope, Budget, and Time Schedule

## Detailed Time Schedule and Work Sequence

Appendix C is a detailed time schedule for all proposed work items related to the full completion of this project—inside and out—which includes items funded and not funded by the grant program.

We've listed work items sequentially in the order that they will be performed with approximate start and end dates for each. Per the application requirements, the time schedule addresses architectural/engineering work, permit schedule, beginning of construction work, performance of all work items, and project completion.

Preliminary Evaluation						
Milestone: Pre-Planning (Due: 31 Dec 2024)						
Active Tasks						
Task	Start Date	Due Date	Responsible	Created By	Priority	Progress Status
Site Plan and Elevation Development	08/30/2024	10/09/2024	Anyone	Johnny Sweet		90% Upcoming (within 7 days)   (Started)
Pre-Application Meeting Prep	08/30/2024	10/17/2024	Anyone	Johnny Sweet		70% Upcoming (Stalled)
Completed Tasks						
Task	Start Date	Due Date	Responsible	Created By	Priority	Progress Status
As-Built Floor Plans	08/02/2024	09/30/2024	Anyone	Johnny Sweet		100% Completed 10/04/2024 by Johnny Sweet
Threatened Building Application						
Milestone: Pre-Planning (Due: 31 Dec 2024)						
Active Tasks						
Task	Start Date	Due Date	Responsible	Created By	Priority	Progress Status
Application in Review	10/09/2024	10/21/2024	Anyone	Johnny Sweet		10% Upcoming (Started)
Conservation Easement Finalization	10/22/2024	12/31/2024	Anyone	Johnny Sweet		0% Upcoming (Not started)
Completed Tasks						
Task	Start Date	Due Date	Responsible	Created By	Priority	Progress Status
Application Development	08/02/2024	10/09/2024	Anyone	Johnny Sweet		100% Completed 10/04/2024 by Johnny Sweet

## Project Financial Information

Please see Appendix D for information regarding our financial capability to complete the project.

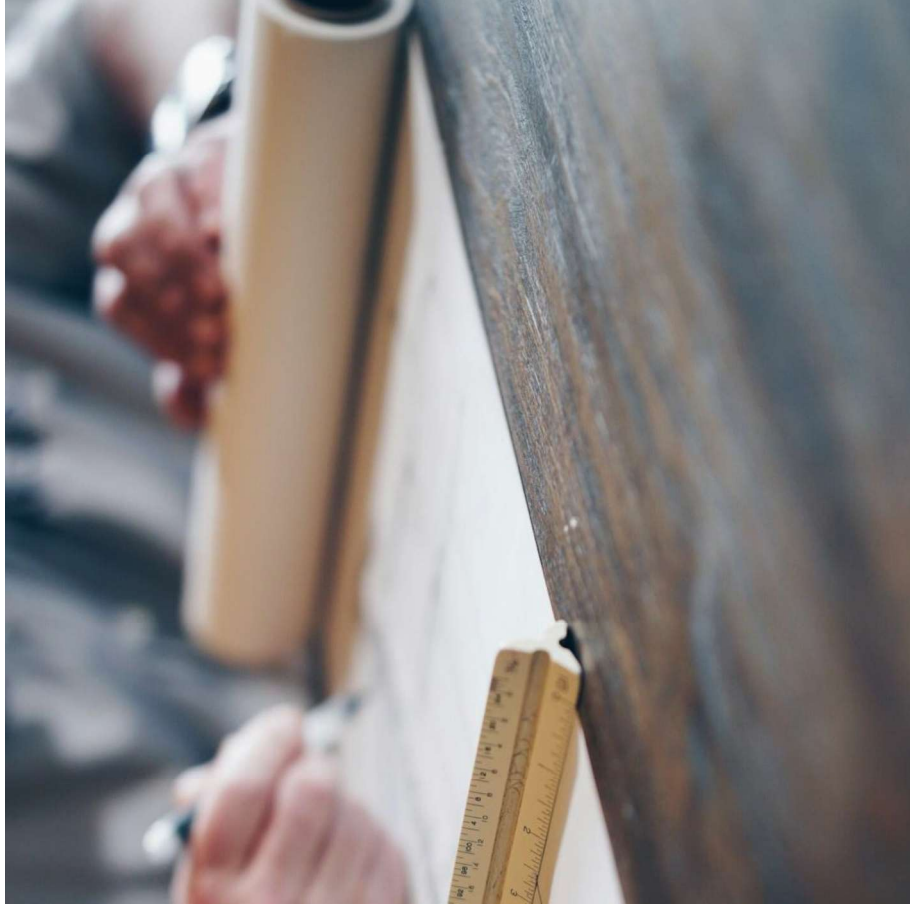




## Drawing/Building Assessments

### Scaled Site Plan

Please see Appendix E for our professionally drawn, scaled site plan, which shows the location of main buildings, all outbuildings, existing and proposed fences and walls, and property lines. Non-historic demolitions are proposed and indicated on the site plan.



## Drawing/Building Assessments

### Conceptual Architectural Elevations

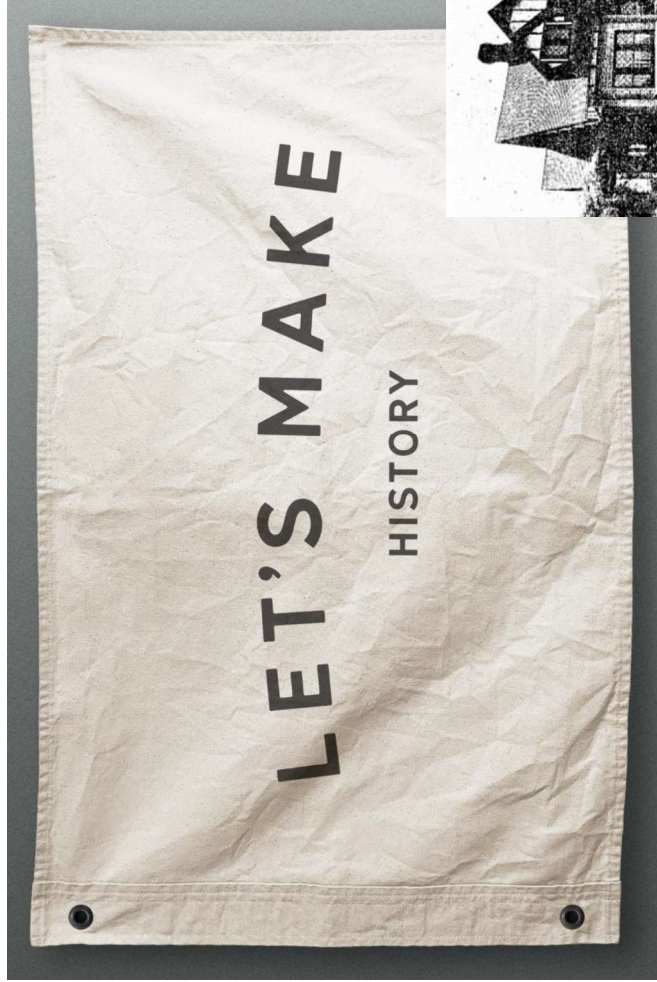
Please see Appendix F, which includes elevations of all building façades on which work is to be performed, with notes depicting locations/description of specific work items.



## Information on Primary Lienholder

Primary mortgage company: **B.E. Lending**  
Contact person: **Karen Causseaux / karen@belending.com**  
Correspondence address: **1 N 1st St. Ste 755, Phoenix, AZ 85004**  
Company telephone number: **(602) 706-0260**  
Loan reference: **John & Criselda Sweet**



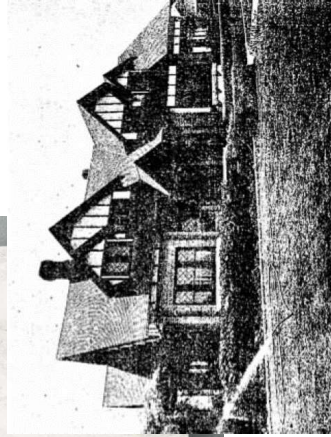


## THANK YOU!

We are grateful for the time you've invested to review and consider our application for the restoration of 303 W Willetta.

With your partnership, we can't wait to make "the dream" a reality by:

1. **Saving and restoring** the Lutgerding House
2. **Adding historic value to Roosevelt**, and
3. **Maximizing the City's investment**



We hope we've demonstrated the immense passion we have, not only for this project, but for historic preservation overall in the City of Phoenix.

We want to become your biggest success story!

So **let's make history**, shall we?



**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.

John N. Sweet  
Property Owner Signature

10/8/2024  
Date

Criselda Sweet  
Property Owner Signature

10/8/2024  
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](mailto: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.

**Threatened Building Application - 303 W Willetta - Eligible Work**

Eligible Project Construction Items	Estimated Cost	Notes
<b>Repairs to Exterior Walls, Doors, Windows</b>	<b>\$108,025</b>	
22 like-for-like diamond windows to match original	\$91,965	Dubuque Window & Door Co. is our preferred supplier. Some banks of multiple windows are treated as "one" window in the estimate.
Original window repair and restoration	\$2,500	
Like-for-like exterior French door replacements to match original	\$5,238	33" for master - Dubuque Window & Door Co.
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<b>Roof Repairs/Replacement</b>	<b>\$31,975</b>	
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Misc. brick repairs	\$4,500	
<b>Stucco Repairs</b>	<b>\$5,500</b>	
Misc. stucco repairs	\$5,500	
<b>Porch and Step Rehabilitation</b>	<b>\$10,000</b>	
At front walkway	\$10,000	
<b>Demolition of Non-historic Additions</b>	<b>\$30,000</b>	
Careful demo of front additions	\$30,000	
<b>A. Total Eligible Expenses</b>	<b>\$199,500</b>	
Ineligible Expenses to be Funded by Other Sources	Estimated Cost	Notes
Permit & City Fees	\$5,000	
Interior Demo	\$20,500	
Plumbing	\$80,000	
Electrical	\$60,000	
Cabinetry	\$30,000	
Flooring	\$30,000	
HVAC	\$15,000	
Insulation	\$10,000	
Paint	\$25,000	
Framing	\$20,000	
Showers/Tile Work	\$30,000	
Countertops	\$15,000	
Drywall	\$20,000	
Millwork	\$20,000	
Finish Fixtures	\$20,000	
<b>B. Total Ineligible Expenses</b>	<b>\$400,500</b>	
<b>Total Project Cost (A+B)</b>	<b>\$600,000</b>	
<b>Percent Overmatch</b>	<b>2.01</b>	

## **Description of Eligible Work Items**

### **REPAIRS TO EXTERIOR WALLS, DOORS, WINDOWS**

#### **New period-appropriate diamond windows (like-for-like replacement)**

22 original windows have been replaced over the years with cheap aluminum alternatives. Our plan calls for the like-for-like replacement of all inappropriately altered windows. The new windows will be wood and period-appropriate in design, including diamond muntins to match the existing original windows and based on historical photo evidence. Please refer to the Dubuque Window & Door Co. estimate for a detailed breakdown of window sizes and specifications. Our application includes photo references.

#### **Original window repair and restoration**

The four windows adjacent to the front entry door had the original diamond muntins destroyed when the glass was replaced in early-2024. We intend to restore the original wood muntins to these four windows. Our application includes photo references.

#### **Exterior door replacement to match original**

Two sets of original, diamond-paned French doors were removed from the northeast side of the house, where the non-historic addition was constructed in the 1980s. The original door openings and hinge locations are still intact. Additionally, one regular swing door was removed on the west side of the house and boarded up. Our plan calls for the like-for-like replacement of these French door sets and swing door. The new doors will be wood and period-appropriate in design, including diamond muntins to match the original design based on historical photo evidence. Please refer to the Dubuque Window & Door Co. estimate for a detailed breakdown of door sizes and specifications. Our application includes photo references.

### **ROOF REPAIRS/REPLACEMENT**

#### **Full roof replacement on main structure**

The composite shingle roof (and small section of flat roof on the south side) is aged and in need of replacement, as evidenced by many roof leaks (visible from the interior) and the opinion of multiple licensed contractors. We intend to replace the entire roof with a modern comp shingle material; color to be cohesive with the exterior paint color scheme.

### **EXTERIOR WOODWORK REPAIRS**

#### **Half-timbering repair/replacement**

The original wood half-timbering (a primary characteristic of the Tudor Revival architecture and visible in many historical photos of the house) is still present at the gables, however some of the wood is deteriorating and in need of repair. Our plan calls for the repair—and replacement, if necessary—of all damaged half-timbering. Our application includes photo references.

## **MASONRY REPAIRS**

### **Various brick repairs**

On the west side of the house, there is a section of original brick (approximately 2' x 3') and one original window that was removed and replaced with plywood. We intend to replace the missing brick and window like-for-like to match what was originally there. Our application includes a photo for reference.

## **DEMOLITION OF NON-HISTORIC ADDITIONS**

### **Carefully remove non-original additions to restore front façade**

There are two large, obviously non-historic additions along the north façade of the house that negatively impact the original Tudor Revival architecture. The northeast addition is approximately 703 sq. ft. and about half of it sits on the original front porch. The northwest addition is approximately 108 sq. ft. and fully sits on the original front porch. Our plan calls for the careful and tedious removal of these additions, allowing the house to be restored to its original design and footprint. Non-original masonry, roofing, mechanical, and interior finishes will be included in the demolition. Our application includes photos for reference. Note: It is possible an original pergola is still intact, hidden behind the walls and ceiling of the northeast addition. We would intend to save and restore the pergola if it is still there!

## **PORCH AND STEP REHABILITATION**

### **Replace missing section of front porch wall**

On the north side of the house, there is a section of the original brick porch wall (approximately 2' x 5') that was removed when a concrete handicap ramp was constructed. We intend to replace the missing brick and concrete ledge, like-for-like to match what was originally there based on historical photo evidence. Our application includes a photo for reference.

## **STUCCO REPAIRS**

### **Various stucco repairs**

At the gables, enclosed sleeping porches, and other areas, the stucco shows much wear and tear and is in need of repair. Our plan calls for the repair of all deteriorated stucco areas and prep for exterior paint. Our application includes photos for reference.



# Tasks Report

Tudor Revival – 303 W Willetta St

## Preliminary Evaluation

Milestone: Pre-Planning (Due: 31 Dec 2024)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Site Plan and Elevation Development	09/30/2024	10/08/2024	Anyone	Johnny Sweet		90%	Upcoming (within 7 days) (Started)
Pre-Application Meeting Prep	09/30/2024	10/31/2024	Anyone	Johnny Sweet		70%	Upcoming (Started)

### Completed Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
As-Built Floor Plans	09/02/2024	09/30/2024	Anyone	Johnny Sweet		100%	Completed 10/04/2024 by Johnny Sweet

## Threatened Building Application

Milestone: Pre-Planning (Due: 31 Dec 2024)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Application in Review	10/09/2024	10/21/2024	Anyone	Johnny Sweet		10%	Upcoming (Started)
Conservation Easement Finalization	10/22/2024	12/31/2024	Anyone	Johnny Sweet		0%	Upcoming (Not started)

### Completed Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
88 Application Development	09/02/2024	10/08/2024	Anyone	Johnny Sweet		100%	Completed 10/04/2024 by Johnny Sweet

## Design Development

Milestone: Pre-Planning (Due: 31 Dec 2024)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Certificate of No Effect (CNE) Submittal	10/09/2024	10/31/2024	Anyone	Johnny Sweet		70%	Upcoming (Started)
CAD-Generated Design, Floor Plans, Site Plan	10/09/2024	11/20/2024	Anyone	Johnny Sweet		30%	Upcoming (Started)
Pre-Application Meeting	11/01/2024	11/27/2024	Anyone	Johnny Sweet		0%	Upcoming (Not started)

## Interior Demo

Milestone: Pre-Planning (Due: 31 Dec 2024)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Interior Demo Permit Submittal	10/15/2024	11/12/2024	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Interior Demo	11/13/2024	12/31/2024	Anyone	Johnny Sweet		0%	Upcoming (Not started)

## Construction Documents

Milestone: Permitting (Due: 31 Mar 2025)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Construction Document Development	11/27/2024	12/31/2024	Anyone	Johnny Sweet		10%	Upcoming (Started)

## Construction Permitting

Milestone: Permitting (Due: 31 Mar 2025)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Construction Documents in Review	01/01/2025	02/14/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Construction Document Revisions (if Necessary)	02/17/2025	03/03/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Obtain Building Permits	03/04/2025	03/31/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)

## Exterior Demo

Milestone: Construction (Due: 31 Mar 2026)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Non-Historic Addition Removal	04/01/2025	04/30/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)

## Exterior Repairs

Milestone: Construction (Due: 31 Mar 2026)

### Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Masonry Repairs	05/01/2025	05/16/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Porch Rehabilitation	05/01/2025	05/16/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Like-for-Like Window and Door Replacement	05/01/2025	06/30/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Roofing	07/01/2025	07/18/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Wood Repairs	01/01/2026	01/30/2026	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Stucco Repairs	01/01/2026	01/30/2026	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Exterior Paint	01/01/2026	01/30/2026	Anyone	Johnny Sweet		0%	Upcoming (Not started)

## Interior Rough-In

Milestone: Construction (Due: 31 Mar 2026)

## Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Framing Rough-In	04/01/2025	04/30/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Electrical Rough-In	05/01/2025	07/31/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Plumbing Rough-In	05/01/2025	07/31/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Insulation	08/01/2025	08/08/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Drywall	08/11/2025	08/29/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
HVAC Ducting Rough-In	08/01/2025	08/29/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)

## Interior Finishes

Milestone: Construction (Due: 31 Mar 2026)

## Active Tasks

Task	Start Date	Due Date	Responsible	Created By	Priority	Progress	Status
Cabinetry Install	09/01/2025	09/12/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Tile and Shower Install	09/01/2025	09/30/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Countertops	10/01/2025	10/10/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Millwork and Trim	10/13/2025	10/31/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Fixtures Installation	11/03/2025	11/28/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Refinish Original Wood Flooring	12/01/2025	12/31/2025	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Interior Paint	01/01/2026	01/16/2026	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Appliance Installation	01/19/2026	01/30/2026	Anyone	Johnny Sweet		0%	Upcoming (Not started)
Certificate of Occupancy	02/02/2026	03/31/2026	Anyone	Johnny Sweet		0%	Upcoming (Not started)

## Eligible Items for Threatened Building Program



# B.E. LENDING

PRIVATE/  
BRIDGE  
LOANS  
NMLS 1359227

October 3, 2024

Borrower: John and Criselda Sweet

Re: 303 W Willetta St, Phoenix, AZ 85003

To Whom it May Concern:

This letter is to confirm that my clients, John and Criselda Sweet, have been approved for financing through B.E. Lending to cover the estimated costs of their renovation project at the property located at 303 W Willetta St, Phoenix, AZ 85003.

The total renovation cost is estimated at \$600,000.00, and we are prepared to provide the necessary funds to complete this project. These funds will be disbursed as per the agreed-upon renovation schedule and subject to project progress inspections.

Should you require any further information or documentation, please feel free to contact me.

Sincerely,

**Karen Cousseaux**

B.E. Lending, LLC

NMLS #1242441

1 North 1st Street, suite 755

Phoenix, AZ 85004

Office: (480) 706-0260x4

Direct: (602) 312-2664

[karen@belending.com](mailto:karen@belending.com)



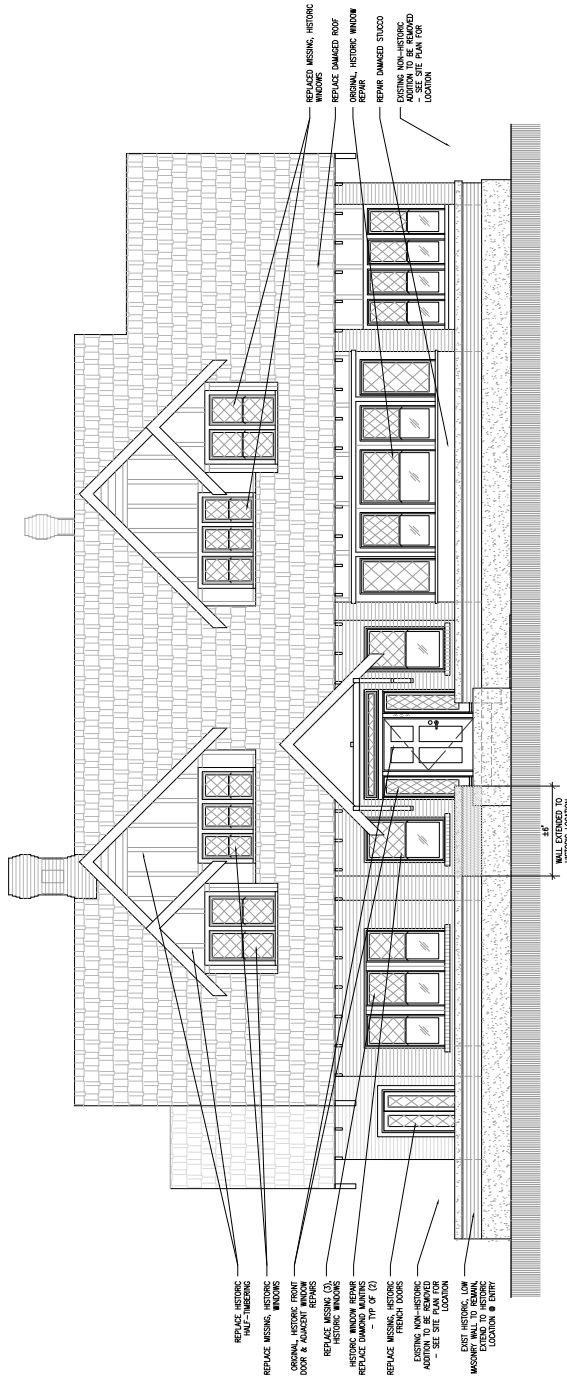


**BERRY DESIGN STUDIO**  
 2020 N. 16th Street, Suite 100  
 Phoenix, Arizona 85006  
 480.706.7476

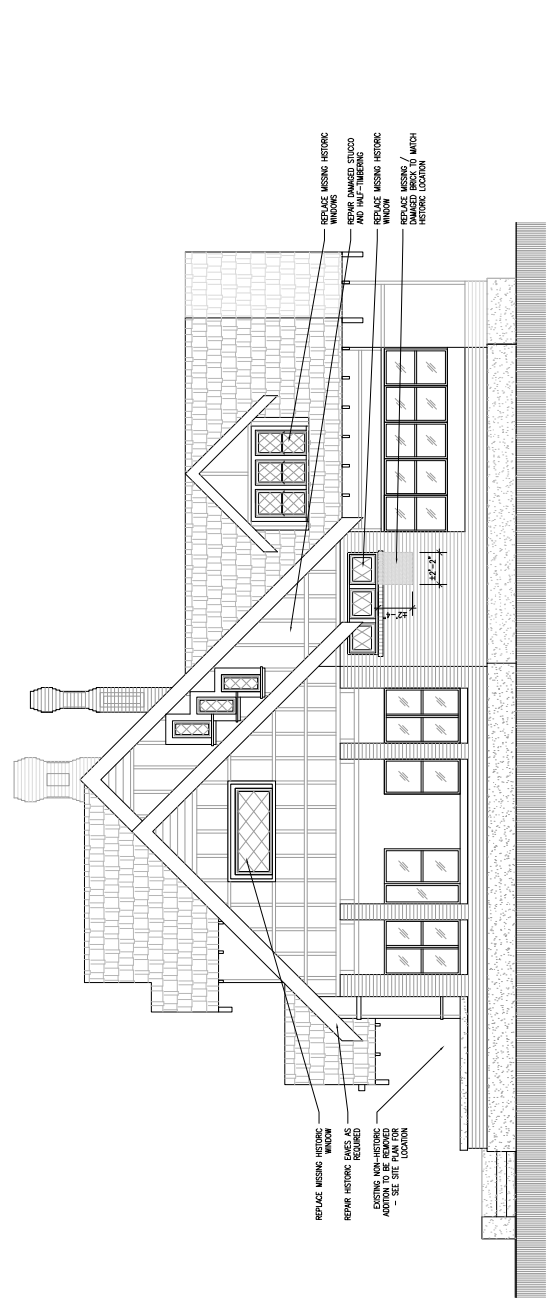
**ELEVATION NOTES**

1. CONCEPTUAL BUILDING ELEVATIONS
2. CONCEPTUAL SITE PLAN FOR LOCATION OF EXISTING, NEW-HISTORIC ADDITIONS AND NEW-HISTORIC ADDITIONS THAT ARE TO BE REPAIRED.

NOT FOR CONSTRUCTION



1. CONCEPTUAL NORTH ELEVATION  
 SCALE: 1/4" = 1'-0"



2. CONCEPTUAL EAST ELEVATION  
 SCALE: 1/4" = 1'-0"

NOT FOR CONSTRUCTION

NO. REVISIONS DATE



PROJECT: TUDOR REHABIL  
 303 W. Millers St.  
 Phoenix, Arizona 85003  
 DATE: 8 October, 2014

SCALE: 1/4" = 1'-0"

CONCEPTUAL BUILDING ELEVATIONS  
 SHEET **A2.0**

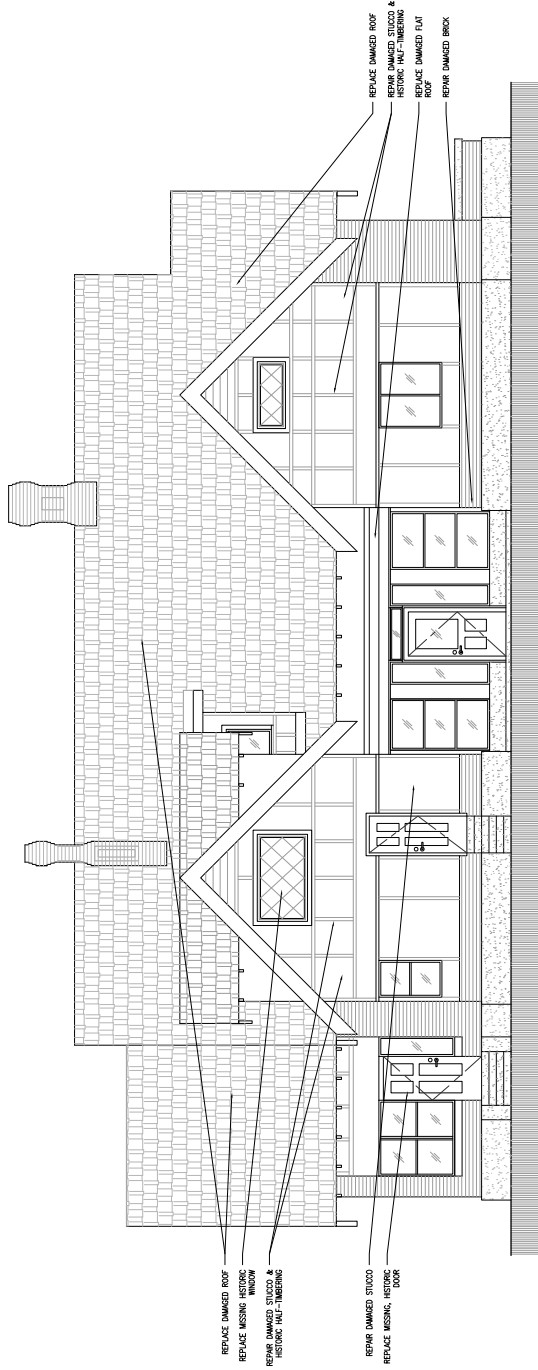
The Architect, its Architectural Firm and the Engineer shall be responsible for the accuracy of the information provided on this drawing. The user of this drawing shall be responsible for the accuracy of the information provided on this drawing.



**BERRY DESIGN STUDIO**  
 2020 N. 16th Street, Suite 100  
 Phoenix, Arizona 85006  
 480.706.7476

**ELEVATION NOTES**

1. CONCEPTUAL BUILDING ELEVATIONS
2. CONCEPTUAL SITE PLAN FOR LOCATION OF EXISTING, NON-HISTORIC ADDITIONS THAT ARE TO BE REMOVED.



1. CONCEPTUAL SOUTH ELEVATION

SCALE: 1/4" = 1'-0"

NOT FOR CONSTRUCTION

NOT FOR CONSTRUCTION

NO. REVISIONS DATE



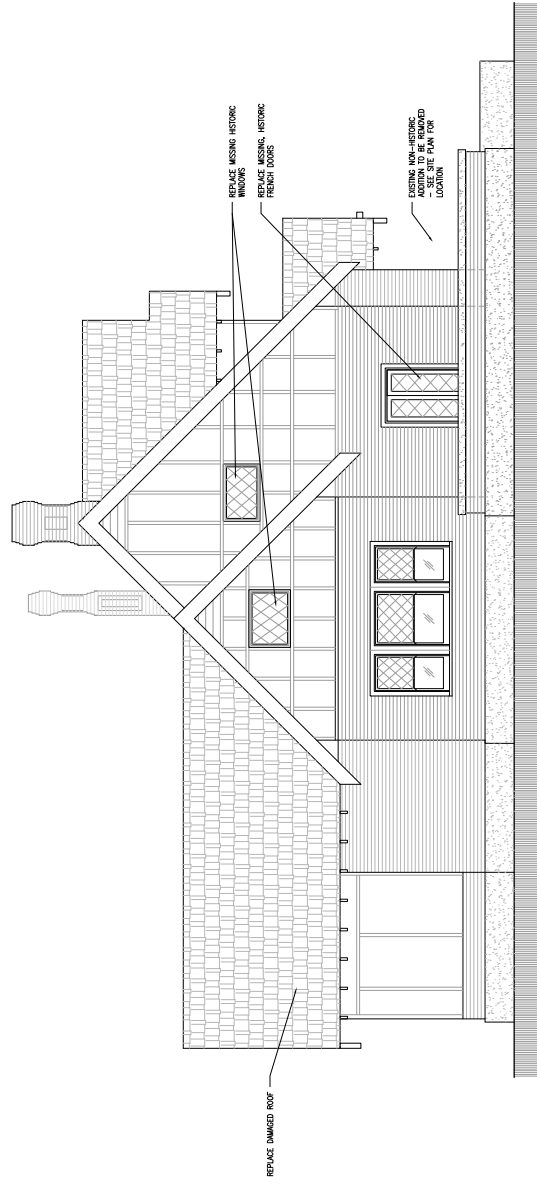
PROJECT: TUDOR RENAISSANCE  
 303 W. Willetts St.  
 Phoenix, Arizona 85003  
 DATE: 8 October, 2014

SCALE: 1/4" = 1'-0"

CONCEPTUAL BUILDING ELEVATIONS

SHEET **A2.1**

The Architect, its Architectural Firm and the Engineer shall be responsible for the accuracy of the information provided on this drawing. The user of this drawing shall be responsible for its use.



2. CONCEPTUAL WEST ELEVATION

SCALE: 1/4" = 1'-0"



# ARIZONA STATE HISTORIC PROPERTY INVENTORY

HISTORIC PROPERTY NAME		COUNTY Maricopa	INVENTORY NO. KA-73 (S)
COMMON PROPERTY NAME Toby House		QUAD/COUNTY MAP Phoenix Quad	
PROPERTY LOCATION-STREET & NO. 303 West Willetta			
CITY, TOWN/VICINITY OF Phoenix		ASSESSOR'S PARCEL NO. 111-31-48	
OWNER OF PROPERTY Community Foundation for Mental Health		PHONE 257-1271	
STREET & NO./P.O. BOX 303 West Willetta			
CITY, TOWN Phoenix		STATE Arizona	ZIP 85003
FORM PREPARED BY Gerald A. Doyle & Associates		DATE August 1982	
STREET & NO./P.O. BOX 4331 North 12th Street		PHONE 264-3082	
CITY, TOWN Phoenix		STATE Arizona	ZIP 85014
PHOTO BY Don Hering		DATE July 1982	
VIEW Toward SE			
HISTORIC USE Single family residence			
PRESENT USE Half-way house		ACREAGE Less/Acre	
ARCHITECT/BUILDER Leighton G. Knipe			
CONSTRUCTION/MODIFICATION DATES Const. ca. 1913; modified/1940, 1945, 1955			



## PHYSICAL DESCRIPTION

The large, one-and-one-half story house at 303 West Willetta is one of the architecturally significant houses in the area. A Tudor Revival style house, it was constructed about 1913 and subsequently underwent numerous modifications, some of which were accomplished with little sympathy for the original design. Fortunately, the changes that have occurred over the years are reversible and do not appear to have irreparably damaged the basic historic fabric of the building.

The massing of the house consists of a great, high-pitched gabled roof with two sets of dormers. A wing at the east end is covered by an off-set gabled roof. The large dormers are comprised of an off-set gable arrangement. Each stuccoed gable features half-timbering, a louvered ventilator, and casement windows with diamond panes. This same motif is carried throughout the walls of the house and is interspersed with panels or wainscot made of bricks. A massive corbelled chimney towers above the highest roof ridge. The house takes advantage of its corner lot to show off its collection of gables.

STATEMENT OF SIGNIFICANCE/HISTORY

This ca. 1913 house is significant for its outstanding Tudor Revival design. The romantic Period Revival style is characterized by the distinctive massing, steeply pitched gables, half-timbering, and diamond-paned lights evident in this example. The house was briefly (ca. 1913-ca. 1917) the residence of George H. Lutgerding. Lutgerding was a prominent rancher, secretary of Lutgerding-Eagan General Contractors, treasurer of the Salt River Valley Water Users' Association, and associated with the Union Bank and Trust Company and the First National Bank of Arizona.

Although it has been altered, the house is an outstanding example of Tudor Revival architecture in Phoenix and may be individually eligible for the National Register.

SOURCES OF ABOVE INFORMATION/BIBLIOGRAPHY

Arizona Republic, October 30, 1950, 8:4.  
Arizona Republican, May 2, 1916, 2:5-7.  
City of Phoenix Building Permit Records.  
Maricopa County Assessor's Records.  
Maricopa County Recorder's Records.  
Phoenix City Directories.  
Sanborn Insurance Maps.

GEOGRAPHICAL DATA/LEGAL DESCRIPTION/VERBAL BOUNDARY DESCRIPTION

BLOCK 10, LOTS 9 AND 10, KENILWORTH ADDITION.

GENERAL COMMENTS/FUTURE PLANS FOR PROPERTY

**Grindstone General Contracting**  
 1200 W. Boston St.  
 Chandler, AZ 85224 US  
 +1 6027696945  
 nolan@grindstonegc.com

# Estimate



**ADDRESS**  
 Johnny sweet  
 303 W willetta st  
 phoenix, az 85003

**SHIP TO**  
 Johnny sweet  
 303 W willetta st  
 phoenix, az 85003

ESTIMATE #	DATE	
1526	10/06/2024	

DATE	ACTIVITY	DESCRIPTION	AMOUNT
	<b>Demo</b>	Demolition: -Completely remove west and east additions -Remove landing/ramp at entry -Remove siding at east and west facade for replacement	30,000.00
	<b>Masonry</b>	Exterior masonry and flatwork: -Rebuild half wall at front porch to match west side wall -Infill wood panels where brickwork was removed -Misc exterior point-work	20,000.00
	<b>Roofing</b>	Roofing: -IKO Cambridge shingles with synthetic pro underlayment. -New drip edge flashing -Colors TBD	31,975.00
	<b>Exterior siding</b>	Exterior Carpentry: -East and west facade replacement -Board and batten walls with window casements -Will evaluate other conditions after demolition -Includes scaffold	9,500.00

SUBTOTAL	91,475.00
TAX	0.00
<b>TOTAL</b>	<b>\$91,475.00</b>

Accepted By

Accepted Date

Line	Label	UOM	Quantity
------	-------	-----	----------

001 **D. Bedroom 6**

EA (4)

\$ 2,194.85 ea.

PERFORMANCE: Standard Performance

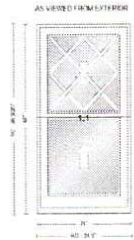
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

**Rough Opening:**  
24 1/2" X 48 9/16"

**Frame Size:**  
24" X 48"

**Unit Dimension:**  
24" X 48"

002 **Puzzle Room**

EA (1)

\$ 1,127.82

PERFORMANCE: Standard Performance

UNIT - Heritage Rectangle CS/AW Transom - Complete Unit, Match Crank Out Profile, Profile: CSS, Wood Sash, Stop Profile: Stepped, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

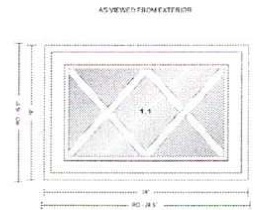
GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Offset Jambs: No Offset, Jambs Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, Standard Fingerjoints

MANUFACTURER NOTES:

The extension jamb will be applied by nailing through the face of the jamb.



Scaled to Fit

**Rough Opening:**  
24 1/2" X 16 1/2"

**Frame Size:**  
24" X 16"

**Unit Dimension:**  
24" X 16"



003 D. Bedroom 2

EA (1)

\$ 4,410.33

PERFORMANCE: Standard Performance

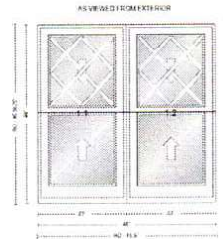
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing, Sill Nosing Locator, 4 9/16" Jamb, Jamb All Units Individually to Full Jamb Depth: No (Standard)

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

Rough Opening: 46 1/2" X 46 9/16"

Frame Size: 46" X 46"

Unit Dimension: 46" X 46"

004 D. Bedroom 1

EA (1)

\$ 3,987.07

PERFORMANCE: Standard Performance

Weight: pulley

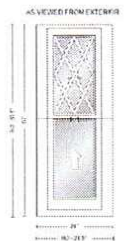
UNIT - Heritage Rectangle Double Hung - Complete Unit, Old World Classic, Sash Operation: Top & Bottom Active, Wood Sash, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Ovolo, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Ovolo Glazing Bead

HARDWARE-ACCESSORIES: Bright Brass Hardware, Chain and Pulley and Complimentary Screws: Solid Brass, Screen: Full Screen, BetterVue Fiberglass Screen

CASING-JAMBS-TRIM: No Sill Nosing, 6 9/16" Jamb, Jamb Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Standard Fingerjoints



Scaled to Fit

Rough Opening: 24 1/2" X 60 1/2"

Frame Size: 24" X 60"

Unit Dimension: 24" X 60"



005 **Pantry**

EA (1)

\$ 574.48

PERFORMANCE: Standard Performance

UNIT - Heritage Rectangle CS/AW Transom - Complete Unit, Match Crank Out Profile, Profile: CSS, Wood Sash, Stop Profile: Stepped

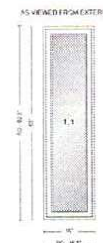
GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Offset Jambs: No Offset, Jambs Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, Standard Fingerjoints

MANUFACTURER NOTES:

The extension jamb will be applied by nailing through the face of the jamb.



Scaled to Fit

**Rough Opening:**  
16 1/2" X 60 1/2"

**Frame Size:**  
16" X 60"

**Unit Dimension:**  
16" X 60"

006 **Kitchen**

EA (2)

\$ 2,004.04

PERFORMANCE: Standard Performance

UNIT - Heritage Rectangle Casement - Complete Unit, Crank Out, Hinging: Left, Wood Sash, Stop Profile: Stepped, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

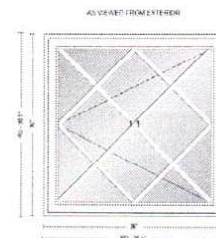
HARDWARE-ACCESSORIES: Clay (Rustic) Hardware, Crank Cover and Handle, Operating Hardware: E-Gard Plus, Locking Hardware: Stainless Steel, BetterVue Fiberglass Screen

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Offset Jambs: No Offset, Jambs Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, Rustic Screen, Standard Fingerjoints

MANUFACTURER NOTES:

The extension jamb will be applied by nailing through the face of the jamb.



Scaled to Fit

**Rough Opening:**  
36 1/2" X 36 1/2"

**Frame Size:**  
36" X 36"

**Unit Dimension:**  
36" X 36"



Printed By: Molly Bodish

Created: 9/6/2024

2024 Pricing

Retail Summary Page 3 of 8

For warranty information please click this link or visit <https://www.kolbewindows.com/resources/warranties>

007 **D. Bedroom 3**

EA (1)

\$ 12,712.30

PERFORMANCE: Standard Performance

*Weight: Pulley*

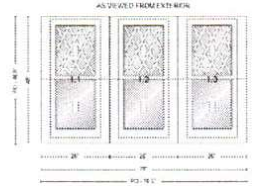
UNIT - Heritage Rectangle Double Hung - Complete Unit, Old World Classic, Sash Operation: Top & Bottom Active, Wood Sash, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Ovolo, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Ovolo Glazing Bead

HARDWARE-ACCESSORIES: Bright Brass Hardware, Chain and Pulley and Complimentary Screws: Solid Brass, Screen: Full Screen, BetterVue Fiberglass Screen

CASING-JAMBS-TRIM: No Sill Nosing , 6 9/16" Jambs, Jambs Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Standard Fingerjoints



Scaled to Fit

**Rough Opening:**  
78 1/2" X 48 1/2"

**Frame Size:**  
78" X 48"

**Unit Dimension:**  
78" X 48"

008 **Bedroom 1 & 4**

EA (2)

\$ 4,313.00

PERFORMANCE: Standard Performance

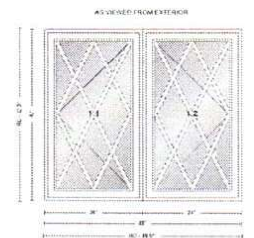
UNIT - Heritage Rectangle Casement - Complete Unit, Crank Out, Hinging: Left - Right, Wood Sash, Stop Profile: Stepped, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Single Arm w/ Euro Hinges, Clay (Rustic) Hardware, Crank Cover and Handle, Operating Hardware: E-Gard Plus, Locking Hardware: Stainless Steel, BetterVue Fiberglass Screen

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Offset Jambs: No Offset, Jamb All Units Individually to Full Jamb Depth: No (Standard), Jambs Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, Rustic Screen, Euro Hinge Color: Ultra Pure White, Standard Fingerjoints



Scaled to Fit

**Rough Opening:**  
48 1/2" X 42 1/2"

**Frame Size:**  
48" X 42"

**Unit Dimension:**  
48" X 42"

MANUFACTURER NOTES:

The extension jamb will be applied by nailing through the face of the jamb.



Printed By: Molly Bodish

Created: 9/6/2024

2024 Pricing

Retail Summary Page 4 of 8

For warranty information please click this link or visit <https://www.kolbewindows.com/resources/warranties>



009 **Bedroom 1 & 3**

EA (2)

\$ 10,629.97 ea.

PERFORMANCE: Standard Performance

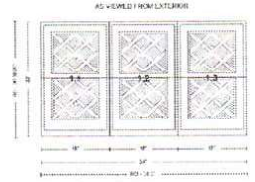
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jamb, Jamb All Units Individually to Full Jamb Depth: No (Standard)

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

**Rough Opening:**  
54 1/2" X 30 9/16"

**Frame Size:**  
54" X 30"

**Unit Dimension:**  
54" X 30"

010 **Bedroom 2**

EA (1)

\$ 5,587.24

PERFORMANCE: Standard Performance

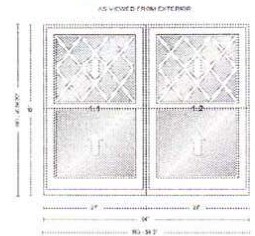
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jamb, Jamb All Units Individually to Full Jamb Depth: No (Standard)

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

**Rough Opening:**  
54 1/2" X 45 9/16"

**Frame Size:**  
54" X 45"

**Unit Dimension:**  
54" X 45"

011 **Bedroom 2**

EA (1)

\$ 5,572.87

PERFORMANCE: Standard Performance

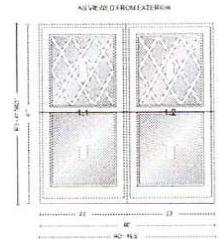
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jamb, Jamb All Units Individually to Full Jamb Depth: No (Standard)

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

**Rough Opening:**  
46 1/2" X 47 9/16"

**Frame Size:**  
46" X 47"

**Unit Dimension:**  
46" X 47"

012 **Bedroom 2**

EA (1)

\$ 6,662.22

PERFORMANCE: Standard Performance

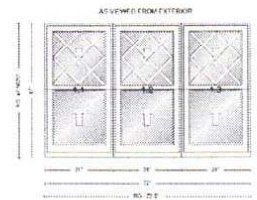
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jamb, Jamb All Units Individually to Full Jamb Depth: No (Standard)

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

**Rough Opening:**  
72 1/2" X 47 9/16"

**Frame Size:**  
72" X 47"

**Unit Dimension:**  
72" X 47"



013 Bathroom 1

EA (1)

\$ 5,460.23

PERFORMANCE: Standard Performance

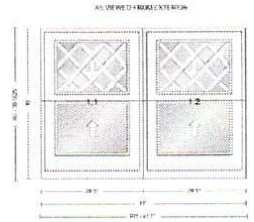
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Jamb All Units Individually to Full Jamb Depth: No (Standard)

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

Rough Opening: 41 1/2" X 30 9/16"

Frame Size: 41" X 30"

Unit Dimension: 41" X 30"

014 Bedroom 4

EA (1)

\$ 5,464.33

PERFORMANCE: Standard Performance

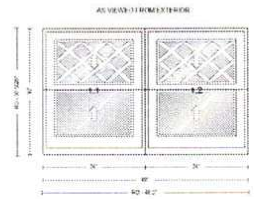
UNIT - Heritage Rectangle Double Hung - Complete Unit, Sterling, Wood Sash, Basic Jamb Profile: Square, Even Split, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

HARDWARE-ACCESSORIES: Lock Style: Signature, Clay (Rustic) Hardware, Screen: Full Screen, BetterVue Fiberglass Screen, Jambliner: Black

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Jamb All Units Individually to Full Jamb Depth: No (Standard)

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Exterior Sterling Frame Extrusion Finish: Primed, Exterior Sterling Sash Extrusion Finish: Primed, Unfinished Interior Frame, Unfinished Interior Sash, White Screen, Jambliner Cover: Wood Wrapped, Vertical Weatherstrip Color: Black, Standard Fingerjoints



Scaled to Fit

Rough Opening: 48 1/2" X 30 9/16"

Frame Size: 48" X 30"

Unit Dimension: 48" X 30"



Printed By: Molly Bodish

Created: 9/6/2024

2024 Pricing

Retail Summary Page 7 of 8

For warranty information please click this link or visit <https://www.kolbewindows.com/resources/warranties>

015 Attic

EA (1)

\$3,721.27

PERFORMANCE: Standard Performance

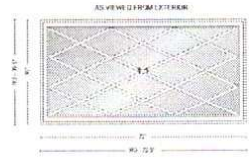
UNIT - Heritage Rectangle CS/AW Transom - Complete Unit, Match Crank Out Profile, Profile: CSS, Wood Sash, Stop Profile: Stepped, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Offset Jambs: No Offset, Jambs Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, Standard Fingerjoints

MANUFACTURER NOTES: The extension jamb will be applied by nailing through the face of the jamb.



Scaled to Fit

Rough Opening: 72 1/2" X 36 1/2"  
Frame Size: 72" X 36"  
Unit Dimension: 72" X 36"

016 Exit

EA (1)

\$2,486.07

PERFORMANCE: Standard Performance

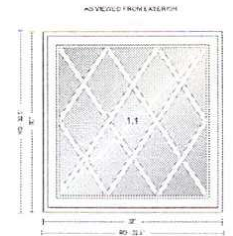
UNIT - Heritage Rectangle CS/AW Transom - Complete Unit, Match Crank Out Profile, Profile: CSS, Wood Sash, Stop Profile: Stepped, 7/8" Performance Divided Lites, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Mill Finish Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: No Preserve or Neat+ Coating, Beveled Glazing Bead

CASING-JAMBS-TRIM: No Sill Nosing , Sill Nosing Locator, 4 9/16" Jambs, Offset Jambs: No Offset, Jambs Applied

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Primed Latex, Unfinished Interior Frame, Unfinished Interior Sash, Standard Fingerjoints

MANUFACTURER NOTES: The extension jamb will be applied by nailing through the face of the jamb.



Scaled to Fit

Rough Opening: 32 1/2" X 32 1/2"  
Frame Size: 32" X 32"  
Unit Dimension: 32" X 32"



017 None Assigned

EA (1)

PERFORMANCE: Standard Performance, Job Specification PG Rating Entry: Do Not Specify

UNIT - Heritage Rectangle Exterior Swinging Door - Complete Unit, Inswing, Heritage, Hinging (As Door Pulls Towards You): Active - Active : Primary Left, Wood Sash, Full Lite, Panel Sticking: Beveled Sticking, 1 3/4" Panel, Frame Thickness: 1 3/4", 7/8" Performance Divided Lites, Wood Exterior Bar, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Champagne Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: Glass Preserve without Neat+ Coating, Beveled Glazing Bead, Tempered

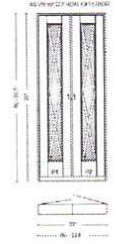
HARDWARE-ACCESSORIES: Single Point Lock w/ 2 Pt Flush Bolt & Dummy Set, Door Lock Type: American Style-Deadbolt on Top, Toronto, Bright Brass - PVD Hardware, Keyed As Pulled From Shelf, Bright Brass Strike, Lock Height: Standard Lock Height, Backset: 45 mm, Adjustable Hinges, Gold Painted Hinges, Astragal, Astragal Type: Wood Low Profile

CASING-JAMBS-TRIM: No Sill, 4 9/16" Jambs

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Unfinished, Unfinished Interior Frame, Unfinished Interior Sash, Black Weatherstrip, Standard Fingerjoints

MANUFACTURER NOTES:

Units with Ovolo or Square Exterior Bar or unfinished, double coat clear, stain with double coat sealer, stain with 20% sheen, high performance clear or custom latex with wood exterior PDL bars will not have a PDL warranty.



Scaled to Fit

Rough Opening: 33 1/2" X 80 1/2"

Frame Size: 33" X 80"

Unit Dimension: 33" X 80"

\$5,238.35

018 None Assigned

EA (1)

PERFORMANCE: Standard Performance, Job Specification PG Rating Entry: Do Not Specify

UNIT - Heritage Rectangle Exterior Swinging Door - Complete Unit, Inswing, Heritage, Hinging (As Door Pulls Towards You): Active - Active : Primary Left, Wood Sash, Full Lite, Panel Sticking: Beveled Sticking, 1 3/4" Panel, Frame Thickness: 1 3/4", 7/8" Performance Divided Lites, Wood Exterior Bar, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Champagne Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: Glass Preserve without Neat+ Coating, Beveled Glazing Bead, Tempered

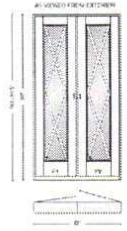
HARDWARE-ACCESSORIES: Single Point Lock w/ 2 Pt Flush Bolt & Dummy Set, Door Lock Type: American Style-Deadbolt on Top, Toronto, Bright Brass - PVD Hardware, Keyed As Pulled From Shelf, Bright Brass Strike, Lock Height: Standard Lock Height, Backset: 45 mm, Adjustable Hinges, Gold Painted Hinges, Astragal, Astragal Type: Wood Low Profile

CASING-JAMBS-TRIM: No Sill, 4 9/16" Jambs

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Unfinished, Unfinished Interior Frame, Unfinished Interior Sash, Black Weatherstrip, Standard Fingerjoints

MANUFACTURER NOTES:

Units with Ovolo or Square Exterior Bar or unfinished, double coat clear, stain with double coat sealer, stain with 20% sheen, high performance clear or custom latex with wood exterior PDL bars will not have a PDL warranty.



Scaled to Fit

Rough Opening: 42 1/2" X 80 1/2"

Frame Size: 42" X 80"

Unit Dimension: 42" X 80"

\$5,256.72

019 None Assigned

EA (1)

PERFORMANCE: Standard Performance

UNIT - Heritage Rectangle Exterior Swinging Door - Complete Unit, Inswing, Heritage, Hinging (As Door Pulls Towards You): Left, Wood Sash, Full Lite, Panel Sticking: Beveled Sticking, 1 3/4" Panel, Frame Thickness: 1 3/4", 7/8" Performance Divided Lites, Wood Exterior Bar, Bar Profile - Exterior: Beveled, Bar Profile - Interior: Beveled, Champagne Spacers

GLASS: Glass Make Up: Double Glazed, Solar Low-E, Mill Finish Spacer, Glass Preserve / Neat+ Coating: Glass Preserve without Neat+ Coating, Beveled Glazing Bead, Tempered

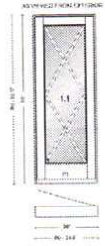
HARDWARE-ACCESSORIES: Multi-Point Lock, Primary Panel MPT Locking Points: Standard Lock, Door Lock Type: American Style-Deadbolt on Top, Toronto, Bright Brass - PVD Hardware, Keyed As Pulled From Shelf, Bright Brass w/ Stainless Secondary s Strike, Lock Height: Standard Lock Height, Backset: 45 mm, Adjustable Hinges, Gold Painted Hinges

CASING-JAMBS-TRIM: No Sill, 4 9/16" Jambs

SPECIES-FINISH-COLOR: Leave All Pine, Exterior Frame Finish: Primed Latex, Exterior Sash Finish: Unfinished, Unfinished Interior Frame, Unfinished Interior Sash, Black Weatherstrip, Standard Fingerjoints

MANUFACTURER NOTES:

Units with Ovolo or Square Exterior Bar or unfinished, double coat clear, stain with double coat sealer, stain with 20% sheen, high performance clear or custom latex with wood exterior PDL bars will not have a PDL warranty.



Scaled to Fit

Rough Opening: 30 1/2" X 80 1/2"

Frame Size: 30" X 80"

Unit Dimension: 30" X 80"

\$ 3,175.71



# JPP Home Innovation LLC.



## STUCCO REPAIR

### Project Info.

- NAME
- EMAIL
- PHONE
- ADDRESS
- 

Johny Sweet  
Jsweetphx@gmail.com  
602-317-9353  
303 W Willetta, Phoenix, AZ  
Phoenix AZ . 85003

---

### EXTERIOR

#### TASK.

Stucco Repairs.

#### NOTES

All the materials are included on this quote

#### SUBTOTAL

**\$5,550**

Thank you for your business!

---

Giane Perez

Authorized Signed



(480)529-4835



945 E 10th Ave, Mesa AZ  
85204



**RE: Window Estimate for Project in Phoenix, AZ**

1 message

**Joe Gionta** <JoeG@rochestercolonial.com>  
To: Johnny Sweet <jsweetphx@gmail.com>  
Cc: Criselda Sweet <sweet.criselda@gmail.com>

Wed, Aug 28, 2024 at 6:50 AM

Good Morning Johnny,

As I begin to work on your estimate, I wanted to provide you with an estimate for the windows on page one of your spreadsheet. See below;

**Tudor Revival**

*Johnny Sweet*

Floor	Room	Qty	Size	Type	Species	Balance	Diamond Grids
First	D. Bedroom 6	4	24x48	DH	PG Mahogany	W&C	17
First	Puzzle Room	1	24x16	Fixed	PG Mahogany	-	7
First	D. Bedroom 2	1	46x46	DH	PG Mahogany	W&C	24
First	D. Bedroom 1	1	24 x60	DH	PG Mahogany	W&C	17
First	Pantry	1	16x60	Fixed	PG Mahogany	-	none
First	Kitchen	2	36x36	Casement	PG Mahogany	-	38

The total for the window units listed above (total 10) is \$102,472.00.

The other windows (2<sup>nd</sup> floor & attic) can be somewhat less on a per unit basis however given 32 total units you can expect that your total price will be near \$300K. If all is good with you I will move forward with completed quote, if not just let me know. Thanks, Joe

Joe Gionta

*Business Development – Luxury Brands*

**Rochester Colonial Manufacturing Corp.**

585.315.1317 m

October 8, 2024

To whom it my concern:

I'm writing on behalf of the Roosevelt Action Association, the official neighborhood association representing the area bounded by McDowell Road, Van Buren Street, Central Avenue, and 7<sup>th</sup> Avenue. One of the primary purposes of the RAA is to retain and enhance the historic character of the neighborhood, as documented by the City-approved Roosevelt Historic District and numerous individually designated historic properties.

We understand that the new owner of 303 W. Willetta, which is a contributing property within the Roosevelt Historic District, has submitted plans for a renovation and an application for funds from the Phil Gordon Threatened Buildings Fund.

At our organization's September 17, 2024 general membership meeting, owners Johnny and Criselda Sweet presented their plans for the property. The presentation was favorably received and the membership voted unanimously to support the Sweet's application for Threatened Building funds.

We look forward to this noteworthy structure being returned to its original grandeur and appreciate the City's willingness to support worthy historic preservation projects.

Sincerely,

Bill Scheel  
Vice President, Roosevelt Action Association

Cc: Joan Kelchner, RAA President

Mark & Rachel Davis  
69 W Lynwood St  
Phoenix, AZ 85003

(602) 432-8905

September 13, 2024

Ms. Ruter, Historic Preservation Officer  
City of Phoenix  
200 West Washington  
3rd Floor  
Phoenix, Arizona 85003

**RE: 303 W Willetta – Threatened Building Program**

Ms. Ruter:

I am pleased to submit this letter of support for the use of 2006 Historic Preservation Bond funds to assist a property owner with rehabilitation work. The applicant is a former member of the Roosevelt Neighborhood and therefore familiar with the unique historic building detail that created a very special place in Phoenix.

In reviewing the rehabilitation plan that the Sweet family intends to perform, I nearly toppled out of my chair when I saw the elevated detail and intentionality that their work will provide to revive the George H Lutgerding House to the glory it had in prior years. I admire the creativity in the strategic density that the duplex conversion will add to the neighborhood that was designed to comingle single, multi and commercial property types. As a past president of the Roosevelt Action Association and Historic Roosevelt neighbor for over 15 years, I know neighbors learn a whole lot from each other. I am excited for myself and our neighbors to witness the rehabilitation as we each carry the responsibility to address our own home's unique need for rehabilitation.

My professional background is in commercial real estate development, and I have seen many properties get either rehabilitated or demolished. In my opinion, due to the nature of home prices and the related land values, the nearly half acre lot size of the property threatens the George H Lutgerding House. Many potential owners, needing to satisfy investor returns, would utilize the by-right zoning of 10 Du/Ac to densify the land. Other potential buyers would await 2 years, demolish the George H Lutgerding House and build a fourplex with ADUs. The City's support of the rehabilitation will prevent the demolition.



Thank you for your review of this letter and the Sweet families request. Please, without delay, support the request and use of 2006 Historic Preservation Bond funds to rehabilitate the George H Lutgerding House.

If you have any questions regarding this letter, please do not hesitate to contact me.

Sincerely,



---

To Whom it may concern:

I am writing to request you approve using threatened building grant money for the restoration of 303 West Willeta St. in Phoenix.

The fact that Criselda and Johnny Sweet are taking on this immense project and financial risk is amazing and admirable. The highest ROI (return on investment) would be gained by destroying the building and constructing multiple dwellings as allowed by code. Instead, the Sweets will be removing hundreds of square feet of architecturally incompatible additions, even though they are technically sound to restore the front facade, porch and pergola. They have several hundred thousand dollars worth of additional work to be done to the property. However, they have a terrific track record of historic restoration, and I truly look forward to their completed project. They will be incredible stewards of their home.

Additionally, their work will have an immense impact on the neighborhood. Previously, the Toby house, for years this property housed developmentally challenged adults as a group home without issue. Unfortunately, the clientele had changed in recent years to include a criminal element that created multiple issues for neighbors. Having this return to a well-maintained home will benefit the neighborhood and city as a whole.

In closing, I'm listing my credentials to show why I feel competent in this area to request your support of the threatened building funding.

City of Phoenix Historic Preservation Commission ~ 7 years (1 year Chair)

Realtor specializing in historic properties ~ 30 plus years with over 75 individual property sales in Roosevelt

Previous Roosevelt resident ~ 10 plus years including president of RAA and Block Watch captain and coordinator/grant writer

Thank you again for your consideration and support in this matter!

Sherry L. Rampy

Associate Broker

Brokers Hub Realty

602-571-5032

[sherryrampy@gmail.com](mailto:sherryrampy@gmail.com)



Johnny Sweet <jsweetphx@gmail.com>

**Re: Letter of Support?**

1 message

Colin Vogel <colin@upsideins.com>  
To: Johnny Sweet <jsweetphx@gmail.com>

Wed, Sep 18, 2024 at 10:09 AM

RE: Letter of Support

My name is Colin Vogel and I have been a resident of the Roosevelt Historic Neighborhood since 1986. Though I currently live at 515 Lynwood St, I was previously a neighbor of this property on Willetta for 30 years. It is certainly a massive undertaking to restore and maintain historic homes and we have all seen it done poorly time and time again in our neighborhood. I would like to give my support to the Sweet family as they seek to restore such a pivotal property in our neighborhood. Being a corner house this project will make such a visual difference to those in and passing through the neighborhood. The excitement of this change is greatly anticipated.

Thank you,

Colin Vogel  
Commercial Insurance  
602-526-1810 Office  
602-524-0373 Cell  
[colin@upsideins.com](mailto:colin@upsideins.com)  
[www.upsideins.com](http://www.upsideins.com)  
**CLIENT LOG-IN**



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INSURANCE SERVICES

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## Energy Access Target Adoption - Citywide

Request the Transportation, Infrastructure, and Planning Subcommittee recommend City Council approval to adopt a proposed Energy Access target to increase Phoenix household participation in low-income energy assistance programs 25 percent by 2030.

### THIS ITEM IS FOR CONSENT ACTION

#### Summary

Ensuring accessible and affordable energy is essential for improving the quality of life for Phoenix residents and fostering economic stability. Energy poverty refers to the inability to meet a household’s energy needs. Energy burden is a common metric that guides policy and regulations to tackle energy poverty; it is defined as the percentage of household income spent on energy bills (including gas and electricity). A household with high energy burden spends more than six percent its pre-tax income on energy bills, while a household with severe energy burden spends more than ten percent of their pre-tax income on energy bills.

Based on the U.S. Department of Energy’s (DOE) Low-Income Energy Affordability Data (LEAD) tool, Phoenix has 584,114 households, of which 150,783 are below the 200 percent Federal Poverty Level (FPL) and are considered low-income households in regards to the target. The 200 percent FPL is commonly used as an eligibility threshold for energy assistance and weatherization programs. According to LEAD, 79,079 low-income households experience a high energy burden, and 42,289 low-income households experience a severe energy burden.

The City of Phoenix’s membership in the C40 Cities Climate Leadership Group and the City’s participation in the Global Covenant of Mayors (GCoM) include a commitment by the City to develop strategies and measures to facilitate energy access and/or reduce energy poverty in our community. To meet the City's GCoM commitments and maintain our leadership as a Carbon Disclosure Project (CDP) A-List city, the City must set a Council-approved Energy Access Plan (EAP) target by January 2025. Additionally, the City is required to develop a draft Energy Access Plan for City Council consideration by January 2026 that will outline the recommended actions the City will take to meet or



exceed the Energy Access Plan targets. The Global Covenant of Mayors Common Reporting Framework requires local governments to assess energy access and energy poverty by considering the conditions of secure, sustainable, and affordable energy. This assessment serves to guide the City in setting appropriate targets. To ensure the development of inclusive and effective targets, public engagement efforts began in 2024 and will continue through 2025 to gather input from Phoenix residents across diverse communities. After a reviewing available data, and following discussions with community stakeholders, local utilities, and relevant City departments, staff recommends the following target: increase household participation in low-income energy assistance programs by twenty five percent by 2030.

Energy assistance programs are currently available through utility companies and this goal will help promote knowledge of these programs. Additional resources may be available, such as weatherization programs and the state's Solar for All program. By increasing participation, Phoenix aims to reduce the energy burden on vulnerable households and improve energy equity across the city.

**Financial Impact**

There is no financial impact to the City associated with this action.

**Responsible Department**

This item is submitted by Deputy City Managers Mario Paniagua and Alan Stephenson, the Office of Sustainability, and the Office of Environmental Programs.



## **Asset Management Program Update - Water and Wastewater Treatment Plants and Remote Facilities - Citywide**

This report provides the Transportation, Infrastructure, and Planning Subcommittee with information on the Water Services Department's Asset Management Program for Water and Wastewater Treatment Plants and Remote Facilities.

**THIS ITEM IS FOR INFORMATION AND DISCUSSION.**

### **Summary**

#### Asset Management Program

The Water Services Department (WSD) is committed to an asset management program to support its mission of providing high quality, reliable, and cost-effective water services that meet the public needs and maintain public support. Asset management is an intentional, proactive approach to maximize the useful life of assets while minimizing life cycle cost. This means asset renewal that is based on age, condition, criticality, and risk value. Within the WSD, each asset is identified, and catalogued according to strict naming conventions in the asset database. The condition of the asset is also recorded in the asset database. Proper preventive maintenance procedures are identified and noted for each asset allowing work orders with proper maintenance activities to be assigned to employees. Standardizing work management processes using a modern computer maintenance management system (CMMS) ensures proactive maintenance on the right assets at the right time.

Risk analysis is also part of asset management. Risk is defined as the Probability of Failure times the Consequence of Failure. The Probability of Failure is dependent on the condition and reliability of the asset, the asset age and effective life, and redundancy of the asset. The Consequence of Failure factors the impact on service and duration of failure, higher replacement cost and repair difficulty, potential for staff and public injuries, and the importance of the asset.

Age, condition, criticality, and risk value are used to forecast the asset's end of life. The risk analysis is used in determining the replacement timeline of the asset, allowing for proper planning of the capital improvement program. The overall goal is to align maintenance and replacement programs so assets will have longer useful lives, resulting in longer replacement cycles. This alignment ensures that capital

improvement programs for replacement and rehabilitation budgets are adequately funded and prioritized to replace the department's critical assets at the end of their useful life. The right assets are replaced at the right time and cost.

### Water Treatment Plants

#### Background

The City of Phoenix (Phoenix) owns five water treatment plants (WTPs), which are used to supply high quality water to customers in the City's water service area.

**24th Street WTP:** located near the intersection of 24th Street and Lincoln Drive. This plant receives water from the Salt and Verde Rivers delivered through the Salt River Project (SRP) canal system. The plant was originally constructed in 1953 and has a treatment capacity of 140 million gallons per day (MGD).

**Deer Valley WTP:** located near the intersection of 31st Avenue and Dunlap Road. This plant receives water from the Salt and Verde Rivers delivered through the SRP canal system. The plant was originally constructed in 1964 and has a treatment capacity of 100 MGD.

**Val Vista WTP:** a jointly-owned facility with the City of Mesa. The plant is located on McDowell Road between Lindsay and Val Vista roads in Mesa, and also receives Salt and Verde River water delivered through the SRP canal system. The plant was originally constructed in 1975 and has a treatment capacity of 220 MGD.

**Union Hills WTP:** located near the intersection of Deer Valley and Cave Creek roads. This plant receives Colorado River water delivered through the Central Arizona Project (CAP) canal system. The plant was originally constructed in 1986 and has a treatment capacity of 160 MGD.

**Lake Pleasant WTP:** located along New River Road, north of Carefree Highway. This plant also receives Colorado River water delivered through the CAP canal system. The plant was originally constructed in 2007 and has a treatment capacity of 80 MGD. This plant is owned by City of Phoenix; however, it is currently operated and maintained by Veolia. City Council approved returning plant operations and maintenance to the City's Water Department starting July 2025.

### Water Remote Facilities

#### Booster Pump Stations

The Phoenix water system includes 109 active booster pump stations which help to maintain adequate water pressure, move water from lower elevations to higher elevations at a consistent pressure, and move water during peak demand events such as fire suppression. The booster pump stations range in pumping capacity from 40,000

gallons per day to 160 MGD. The total pumping capacity for the water system is 1.1 billion gallons per day. These facilities are located at remote sites and water treatment plants throughout the 540 square-mile water system. The average life span of a booster pump station is 25 years with proper maintenance.

### Storage

The Phoenix water system includes 57 water storage reservoirs which maintain adequate water pressure and provide water for peak customer demand periods throughout the day and during other peak demand events, such as fires. They also provide redundancy within the system in times of localized water system outages, such as water main breaks. The storage reservoirs in the Phoenix water system are constructed of either concrete or steel and range in size from 10,000 gallons to 40 million gallons. They are located at water treatment plants as well as other remote facility locations throughout the water system. The average life span of a concrete reservoir is 50 years with proper maintenance. The average life span of a steel tank is 25 years with proper maintenance.

### Wastewater Treatment Plants

Phoenix owns and operates three wastewater treatment plants (WWTP).

**91st Avenue WWTP:** located near the intersection of 91st and Southern avenues. It was constructed in 1958 and after multiple expansions, it now has a capacity of 230 MGD. This plant is the largest wastewater treatment plant in Arizona. It is jointly owned with four partner cities: Glendale, Mesa, Scottsdale, and Tempe. Phoenix operates the facility on behalf of the partners.

**23rd Avenue WWTP:** located near the intersection of 23rd Avenue and Lower Buckeye Road was initially constructed in 1932. This facility treats flows from central Phoenix and has a capacity of 66 MGD.

**Cave Creek Water Reclamation Plant:** located near the intersection of Cave Creek and Deer Valley roads. This facility began operating in 2002 but was taken out of service in 2009 due to the downturn in the economy. The facility is currently under construction to bring the plant back online to treat flows in the area. Upgrades are expected to be completed in 2026 with a treatment capacity is 8 MGD.

### Wastewater Remote Facilities

#### Lift Stations

The Phoenix system includes 29 lift stations ranging in size from 200,000 gpd to 14 MGD. The lift stations move wastewater from low points to higher elevations. The average life span of a lift station is 20 years, but some pieces of equipment will need to be rehabilitated or replaced sooner due to the harsh environment.



### Force Mains

Lift stations pump wastewater through force mains to move the flow to a higher elevation. Force main lengths range from a few hundred feet to three miles. Force main sizes range from eight-inch to 24-inch and each lift station has at least one force main leaving the station. Over half of the stations have two or more force mains leaving the site. This could either be for redundancy or flow quantity. The average life span of a force main is 75 years. There are many factors that impact a force main condition such as soil conditions, wastewater composition, and sewer gasses.

### Odor Control

Phoenix has 33 odor control stations in the system. There are two major options to treat odors in the collection system. We can either treat the vapor phase (or air) by processing the fowl air through a filter or we can treat the liquid phase by using chemicals. Phoenix utilizes both options and both options require a facility. There are 21 liquid phase treatment sites and 12 lift stations with biofilters installed.

### Infrastructure Renewal

WSD has ongoing programs to rehabilitate and replace aging assets at treatment plants and remote facilities. Over the next six years, WSD has budgeted in the Water Capital Program \$227M for water storage reservoirs, \$212M for booster pump stations, and \$756M for water treatment plants. Over the next six years, WSD has budgeted in the Wastewater Capital Program \$135M for remote facilities, \$13M for odor control, and \$1,248M for wastewater treatment plants.

### **Responsible Department**

This item is submitted by Deputy City Manager Ginger Spencer and the Water Services Department.



## **Infrastructure Funding and Financing Update - Citywide**

This report provides information to the Transportation, Infrastructure and Planning Subcommittee on infrastructure funding and financing challenges to serve newly developing parcels in Phoenix. The report provides general infrastructure funding and financing information, however, the complexity of the topic necessitates a focused approach on water infrastructure because of the significant infrastructure needs to address new growth areas of the City.

### **THIS ITEM IS FOR DISCUSSION AND POSSIBLE ACTION.**

#### **Summary**

According to the US Census, Phoenix was the fastest-growing major city in the United States between 2010 and 2020. The Mayor and City Council’s long-standing commitment to responsible long-range planning, prudent fiscal management, and targeted economic development opportunities, has enabled the City to capture beneficial growth over an extended period. Phoenix is well-positioned to continue high levels of new development, but a unprecedented infrastructure investments will be needed to deliver the quality-of-service residents and businesses have come to expect.

#### **Development Opportunities**

Desirable development conditions exist in all corners of the City, please see attached Citywide Map. Areas north of the Central Arizona Project Canal (CAP) feature vast expanses of undeveloped land, controlled by the Arizona State Land Department, suitable for world-class commercial, mixed-use development, and large master planned communities. The City’s more-established central areas have experienced record levels of infill housing and mixed-use redevelopment that is promoting a more walkable and transit-oriented urban environment. The western portions along the Loop 101 Freeway are seeing significant development interest. The south and southwest areas feature new opportunities to “reimagine” the Salt River- The Rio Reimagined project facilitates post-war industrial development with new uses that promote riparian river restoration along with public access and bring value to the neighboring communities. The expansion of the light rail along Central Avenue will continue to attract development interest. The far southwest area (Estrella and Laveen Villages)

has the major infrastructure pieces in place to quickly fulfill first-generation “build-out” with high-quality development projects.

While there is no shortage of development opportunities in Phoenix, it is incumbent on the City to ensure that new development continues to cover a fair and proportionate share of the infrastructure costs to expand City services and ensure growth minimizes negative impacts to existing residents or City operations. These capital infrastructure/facility costs do not include the required maintenance and operating staffing costs that are the responsibility of the City.

### **Infrastructure Challenges**

The City employs a multi-pronged approach to provide public services to new development and to ensure the existing community is minimally impacted by growth. In general, it is the developer’s responsibility to extend public networks and mitigate impacts to the City’s roadways, water, and sewer facilities as these are required to serve new development. Developer contributions for other City services, such as public safety facilities, parks, libraries, and flood control improvements are typically covered with development impact fees that charge the development their proportionate share of the upfront capital cost of infrastructure. Those facilities are provided by the City as impact fee funding is collected over time and a significant enough amount becomes available to construct the facility. It is critically important to note that some public services can be delayed and phased in over time, while others must be installed at the time of development like water, wastewater and some public street infrastructure.

Water and sewer treatment plants present a unique challenge. These facilities are typically designed to achieve economies of scale, operating efficiency, and sized to serve regions comprised of many individual developments. As a result, water and sewer treatment plants carry a price tag that few developments can amortize alone. Historically, the City has financed water and sewer treatment plants using revenue bonds backed by water rate payers. While costs for new treatment capacity can be captured in water and sewer development impact fees, they are also reflected in rate-setting and have an impact on the existing customer base. However, this is how prior water and wastewater facilities were financed and constructed. Those impacts can be mitigated by charging impact fees that can then help pay down the debt financed by the water rates to help offset future water utility costs.

Below are specific examples of imminent infrastructure funding challenges:

*Wastewater Collection:* The “primary” sanitary sewer system that drains to 91st Avenue Wastewater Treatment Plant (WWTP) is unable to support continued

development north of CAP.

- Re-commissioning and expansion of Cave Creek Water Reclamation Plant (WRP) will serve northeast areas.
- The planned North Gateway WRP will serve northwest areas.
- Both northern treatment facilities will free-up capacity in the “primary” sewer collection system and 91st Avenue WWTP to allow for other new growth to utilize that capacity.

*Water System Reliability:* The growing risk of losing access to Colorado River water dictates high-cost alternatives to ensure an adequate and resilient water system capable of supporting future development.

- Advanced Water Purification is needed at all wastewater treatment facilities to maximize value by extending the utility of water supplies for existing and new development.
- Surface water supply augmentation is necessary to mitigate long-term impacts of climate change.
- Continued development of groundwater production capability, that is commensurate with demand to meet essential needs, is necessary to mitigate risk of short-term loss of supply due to an emergency.

*Roads and Bridges:* More than two dozen new bridges costing 10’s of millions of dollars each are needed to extend the road network across an array of washes and canals.

*Drainage Infrastructure (New Development):* The City and the Maricopa County Flood Control District had to construct new drainage basins, channels and pipes as the Southwest area has transitioned from primarily agricultural to a mix of residential, commercial and employment uses. This has happened over multiple years and continues with the current draft impact fees including \$75M to continue with these projects to serve new development.

*Public Safety:* Lower density development and limited road networks create the need for more public safety resources per capita and facilities to house the new staff to provide response times that are comparable to other parts of the City.

These examples highlight some of the pressing infrastructure challenges the City faces in supporting continued growth and development. Addressing issues such as wastewater system capacity, water reliability, roads, bridges and drainage improvements, and public safety resource infrastructure will require significant financial investment.



## **Funding and Financing Tools**

Funding and financing tools (FFT) that provide for infrastructure are divided into three sections below that address their potential based upon the scope of required infrastructure and timing of when that infrastructure is needed to serve new development. Most projects use a number of different funding and financing sources to help pay for the overall construction project financing as determined by the developer and approved by the City.

### Typical Funding and Financing Tools

It is important to note that most infrastructure for new development is provided by the developer in one of two ways: exactions or developer contributions. These two are broad terms that can be used to describe other funding tools in other sections.

#### *Exactions:*

Impacts of a new development on existing infrastructure networks may be mitigated by developer exactions. An exaction usually requires the developer to construct improvements. The City may allow a payment “in-lieu” of requiring construction when plans are already in place or to address proportionality requirements. Project mitigation requirements are determined by a study performed by a licensed engineer (e.g. Traffic Impact Study) and must be approved by appropriate City staff.

#### *Developer Contributions:*

Upfront capital costs for public facilities needed to serve new development can be covered with various types of developer contributions. Developer contributions may be assessed by the City in a variety of means but must be specific and proportional to the impact created by the proposed project. An example of this would be the City charging an impact fee for Police and Fire facilities that will serve the new development.

### Large Scale Funding and Financing Tools

These tools typically require larger land areas, more costly infrastructure service requirements or are more complicated development projects.

#### *Private Developer:*

In addition to building infrastructure, developers may contribute funding known as in-lieu payments to help cover the cost of public facilities. The Sonoran Desert Drive Funding Policy is one example of an in-lieu payment framework. The policy functions like an exaction, where the developer is required to mitigate their impact, except the mitigation is in the form of a cash contribution. While in-lieu payments represent a cost to new development, they can be a preferred alternative to allow projects to move forward prior to completion of large regional facilities that can take several years to

finance, design, and construct.

*Landowner:*

In some instances, upfront infrastructure investments can generate efficiencies and increase land values, providing a positive return to landowners. The Rawhide Wash Flood Control Project is an example of a developer, under a contractual obligation with the Arizona State Land Department, who provided the City's share of funding toward the project; this will result in hundreds of acres of undeveloped state land being removed from a floodplain. This will increase land value, reduce development costs, and accelerate timelines by eliminating 404 permit requirements and other challenges of building in a floodplain

*Impact Fees:*

Paid by developers/builders at the time building permits are issued. Impact fees are a restricted funding source that can only be used for one-time capital construction expenses or debt service payments for upfront capital financing. Impact fees are assessed for Fire Protection, Police, Parks, Library, Roads & Bridges (Major Arterials), Flood Control (Storm Drainage), Wastewater (Collection & Treatment), and Water (Transmission, Treatment, Resources). Impact fees are regulated via Arizona Revised Statutes 9-463.05 and subject to proportionality and nexus standards established in US case law. While impact fees have been a useful tool to ensure all new development contributes a share toward the cost of extending services, impact fees rarely cover the full cost of facilities, timing of collections are unpredictable and frequently serve to reimburse or offset private and/or public investments in qualifying facilities.

*Revenue Bonds:*

Bonds backed by water or sewer rate revenue for major capital infrastructure and paid back over an extended timeframe (e.g. 25 to 40 years). Payments on the bonds are reflected in rate-setting such that rate revenues received, in-excess of operating costs, are pledged to the bondholders.

Other Funding and Financing Tools

These tools are utilized on an infrequent basis. These tools cannot cover the infrastructure to construct water or wastewater treatment facilities by themselves. Federal grants are helpful if they are awarded but are not a reliable funding source to pay for infrastructure that serves new development.

*Community Facilities District:*

Community Facilities Districts (CFD) are special taxing districts used to finance public infrastructure. CFDs typically collect secondary property taxes or special assessments from property owners within the district to pay debt service on infrastructure bonds.

CFDs are initiated by developers and subject to City Council approval. City staff (primarily Finance Department) and Council serve as district administrators and board. CFD's are time intensive for staff to initially setup and administer over time and typically cannot fund significant infrastructure improvements such as wastewater treatment plants because the estimated value of the improved land is utilized to secure the bonds. Since it is an estimated value and the chances of market volatility over time, the financed debt must be significantly below the land value or the bonds will not sell.

*Federal Grants:*

The City has used a variety of grants to support projects to modernize infrastructure while addressing key challenges like climate change, equity, and economic growth. For example, Bipartisan Infrastructure Law (BIL) / Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA) Grants are specifically designed to target the needs of underserved and historically marginalized communities, focused on improving a wide range of infrastructure with an emphasis on promoting equity and improving resilience in infrastructure investment. The City has used these funds to support the construction and planning of projects aimed at rehabilitating aging infrastructure, enhancing community access to public transportation, improving safety for roadway users, and bolstering resilience against climate change. For the reasons stated above, these types of grants are not typically allocated for infrastructure in newly developing parcels in Phoenix. However, there have been some opportunities available to the City to apply for. For example, in the summer of 2023 the Water Services Department applied for up to \$292 million from the Bureau of Reclamation's "Lower Colorado River Basin Conservation and Efficiency Program" to support construction of the North Gateway Water Reclamation Facility. These funds, if granted, will provide critical upfront capital to support sustainable development in north Phoenix in exchange for continued forbearance of the City's Colorado River allocation. As of the Fall of 2024, the City's application remains active but has not been issued a final award.

**Historical Funding Sources**

Prior to 1980 the cost for all water and wastewater infrastructure was fully born by water and wastewater rate payers, with some supporting federal monies. This started to change in the 1980's when the federal government slowed infrastructure spending. The City adopted the Development Occupation Fee, an early fee meant to ensure development funded some portion of the water and wastewater infrastructure necessary to support their projects. These programs were expanded in 1996, when the City adopted it's first impact fees which included all new development infrastructure in the suburban growing parts of the City. These programs were restricted by Arizona statute in 2012, when the current impact fee legislation was adopted, creating the

## City's current Impact Fee Program.

How these funding sources have been used to finance new infrastructure has varied widely as the legal frameworks have changed. Infrastructure constructed prior to the Development Occupation Fee and Impact Fee programs were funded almost exclusively by tax and rate payers. As the Development Occupation Fee and Impact Fee programs matured, funds collected from these programs began to help fund minor and major infrastructure improvements, such as the Lake Pleasant Water Treatment Plant and Cave Creek Wastewater Treatment Plant. However, treatment plant size infrastructure investments always include significant capital costs that must be installed prior to/concurrent with new development. Because impact fees accrue over time they cannot be used to cover those substantial early costs. As such, the City has previously elected to sell revenue bonds to raise upfront capital. Because water and wastewater rates are the collateral used to backstop all revenue bonds such transactions must be backed by water and wastewater rates. In order to maintain a high bond rating (lower interest costs), the City has committed to the bondholders to collect fees from customers, in an amount sufficient to make the payments on the bonds. Impact fees, once collected, can be used to fund periodic payments on the bonds or reimburse the water or wastewater system and reduce future water utility costs.

The net effect of this policy is water and wastewater rate increases to fund infrastructure followed by rate modulation if development proceeds as planned and impact fees are collected. If development fails to occur, water and wastewater rate payers are responsible for the full cost of this infrastructure.

### **Recommendations for Next Steps**

The overall focus of this report is to provide an overview of infrastructure financing and funding tools to facilitate new growth. In alignment with the broader goal of optimizing infrastructure financing for new developments, the following recommendations focus on strategies to efficiently utilize existing resources, encourage thoughtful development sequencing, and ensure fiscal sustainability.

- **Leverage Available Capacity:** Evaluate existing infrastructure networks for available capacity and guide new development to those locations.
- **Parcel Sequencing Strategy:** Coordinate with landowners, like the Arizona State Land Department, on development sequencing (large-scale phasing) plans to facilitate economically efficient growth that leverages existing public facilities and minimizes the need for new infrastructure.
- **Fiscal Impact Analysis:** The City could hire a consultant to help develop a robust

fiscal impact model that helps to evaluate development revenue with potential future operating and maintenance costs. Staff will need to devote time to further develop a scope of work and identify potential costs. There is no identified funding to undertake this effort and it would require a future allocation by the City Council to pursue.








By leveraging available infrastructure capacity and coordinating development sequencing, the City can help to minimize some infrastructure costs, but regional scale infrastructure requirements, like water and wastewater treatment plants, are necessary now to facilitate new growth. These types of tools require a comprehensive strategy that involves private property owners, developers, City staff along with elected officials to maximize fiscal benefits

**Responsible Department**

This item is submitted by Deputy City Managers Alan Stephenson, Ginger Spencer and Inger Erickson, the Planning and Development, Water Services, and Street Transportation departments and the Office of the City Engineer.



# ATTACHMENT A

-  New Development Areas
-  Freeways Corridors
-  Transit Oriented Redevelopment Areas
-  Rio Reimagined
-  Salt River
-  CAP Canal
-  Freeways

