

The Phoenix Gazette

Grown-Up

Sun City West weighs post-Webb option

By Connie Cone Sexton
Phoenix Gazette

SUN CITY WEST — Does incorporation lie ahead for this community?

Or will residents ask to be annexed by a neighboring city? Will Sun City Westers seek to create special districts such as those they have for fire protection or electric power? Will the Property Owners and Residents Association merge with the Recreation Centers of Sun City West to oversee the community as one unit?

Or will the residents face the future by doing nothing?

These are the five options community leaders are exploring as they prepare to go it alone without Del Webb Corp.

In the mid-1970s, officials at Del E. Webb Development Co. decided to give birth again — to a second retirement community. The great success and popularity of child No. 1, Sun City, gave way to the creation of a little sister — Sun City West.

Room for expansion had run out in Sun City, so the company acquired property about five miles west and in 1978 started to transform about 6,000 acres — the site of a cattle feed lot — into another haven for retirees.

Today, about 17,000 residents living in some 6,000-plus dwellings call Sun City West home.

About 3,500 units are left to build; the Del Webb Communities Inc. construction program is projected to end in 1993. When the last units are sold, Del Webb, which is actively involved in community planning, lobbying with legislators on residents' behalf and other development aspects, will leave the community, as it did in Sun City.

Once the community's developer is gone, how will Sun City West best function?

That question and the five options listed above will be brought before residents next month during a general meeting.

Ernest Edison, a member of the PORA committee studying the horizon for Sun City West, said planning and study has



“There is a possibility we could incorporate if the people want it. There’s a great number of people for it, a lot of people against it and even a lot more people who are uncertain.”

— Ernest Edison

been going on.

“For three years we have been zeroing in on each of the options and we haven’t taken stand on anything yet,” he said.

“We’re trying to be factual, not emotional. We’ve held a number of general meetings with the general population to ask their opinion. The most important of these meetings will be Oct. 13 where we will present a financial report on incorporation and what it will cost,” he said.

The committee is scheduled to meet at 9 a.m. Thursday in the R.H. Johnson Social Hall, 19803 R.H. Johnson Blvd.

Edison would not elaborate on the report that will be given but said incorporation is a plausible option. “There is a possibility we could incorporate if the

people want it. There’s a great number of people for it, a lot of people against it and even a lot more people who are uncertain,” he said.

Of the other four options, annexation and creating special districts and merging PORA and rec centers are probably not feasible, he said.

Most residents would not want to be annexed by another community, Edison said. Because the number of registered voters in Sun City West exceeds that in Mirage, Surprise and Peoria, there would be no incentive on the part of those communities to allow Sun City West to become dominant, he said.

Regarding creating special districts to cover basic services, the state constitution does not permit an unincorporated community to start special districts for police or electric water or sewer utilities supply, Edison said.

And combining PORA and the rec centers would serve “no useful purpose and would be “divisive instead of unifying” because the concept has no resident support, he said.

He said as discussions over the option increase, the next few months will prove to be “very exciting and very interesting. We want to make this the finest area to live in. The whole purpose is to protect and preserve it,” he said.

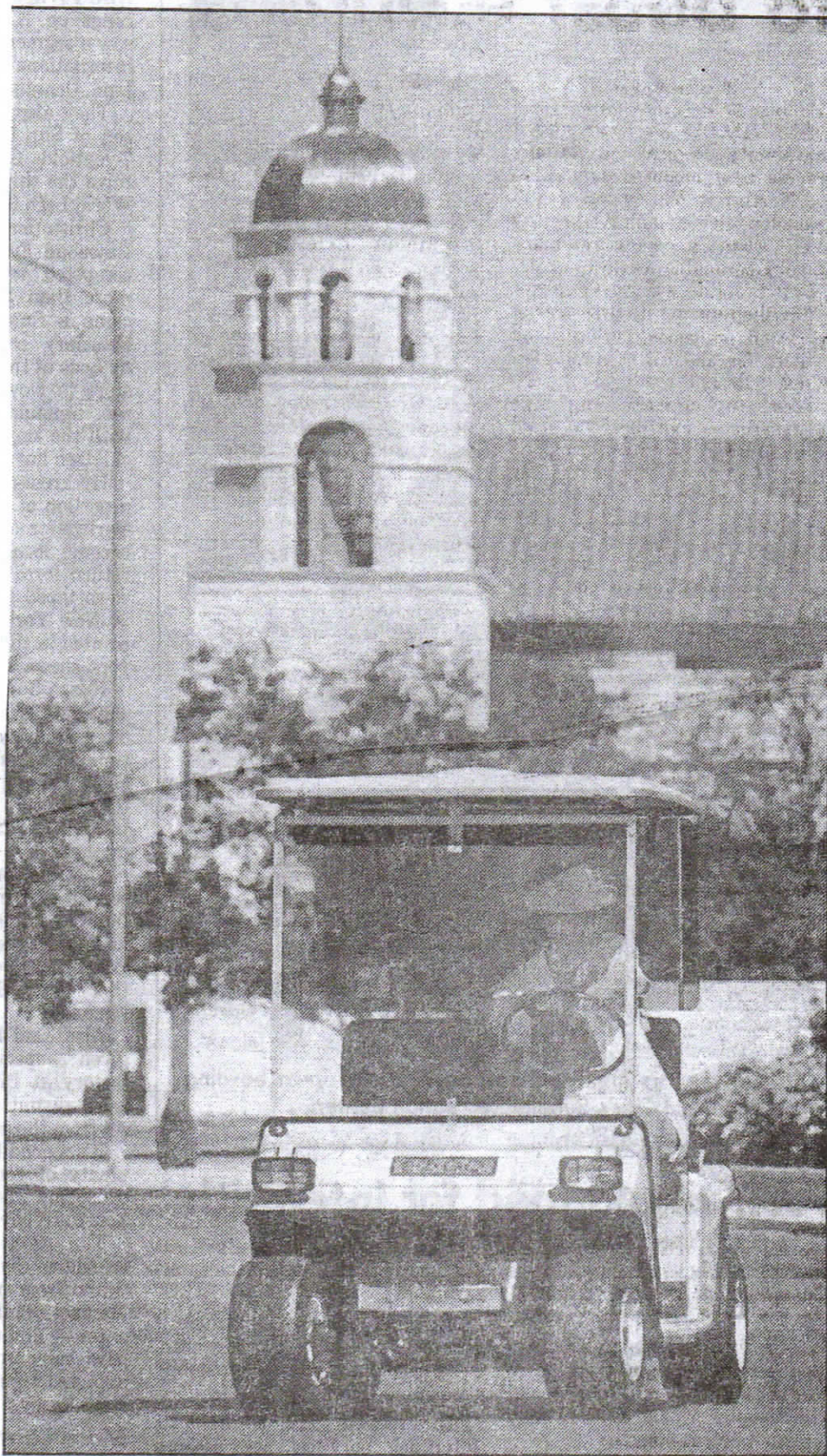
A final report with the committee recommendation will be given to the PORA board in November.

“One thing we agree on is we should do something. Just drifting doesn’t seem to satisfy anybody.”

His viewpoint is repeated in the concluding remarks in the long range plan update:

“For a successful future, Sun City West requires and deserves better means of community management and control that can be provided by the voluntary association of residents into a membership organization manned by part-time workers and volunteers and funded by minimal voluntary dues collection. This need must be addressed vigorously and promptly.”

V F SCW Incorporation



Sun City West is celebrating its 10th year.

Mark Henle, *Phoenix Gazette*

Testing waters

Incorporation studied in Sun City West

By **Connie Cone Sexton**
Phoenix Gazette

SUN CITY WEST — Suddenly, Ernest Edison's voice dropped below a whisper.

It's no wonder — he had said the "I" word.

Edison was standing in front of about 500 Sun City West residents, leading a meeting on what kind of local government might be best for the community.

Most everyone in the Johnson Social Hall could hear him as he spoke evenly and clearly into the microphone. That is, until he mentioned that old "I" word.

"What did you say?" someone from the audience called out as Edison's voice ebbed.

Edison paused a couple of beats. "Incorporation," he said right into the mike. He looked up. "It's a dirty word on the part of some people, the only way to go on the part of some others. But certainly, it's an option that needs more scrutiny."

There it was. Edison had said it, right at the beginning of the meeting. But no one yelled angry words of protest. No one rushed the stage or noisily marched out. No one even got out of his seat.

Residents said later that they had come to listen, not argue. They attended to examine financial proposals in order to erase any confusion over the issue. They wanted to know what it would take and what it would mean to turn Sun City West into a real city.

The meeting leaders were members of a finance committee created by the Property Owners and Residents Association to explore the financial aspects of incorporation. Members of the committee, who are working in tandem with a governance committee, chose to explore the option of having the community incorporate under a "charter contract."

Most cities and towns are incorporated under general law, which makes the communities responsible for providing services and allows an elected city council to set sales taxes, Edison said.

What this committee researched is limited form of government, he told the audience.

"Very strict limits could be set, which could prohibit the city council from setting taxes, raising the sales (or property) tax without going to the residents with a referendum," he said.

Historically, many residents opposed to incorporation have feared a council could get out of control and set taxes too high, Edison said.

The charter contract government would allow the community to continue contracting out for services, such as police and fire protection, and utilities.

A minimal city staff also would be needed. About 15 people compared to the 300 needed for a general law incorporation, Edison explained.

"A charter contract can be tailored made ... to fit Sun City West," he added.

One member of the committee told the audience that deciding on incorporation or other options for government will affect the lifestyle of Sun City West.

Potential revenue, expenses listed

A Property Owners and Residents Association committee has compiled a potential budget for an incorporated Sun City West.

The committee assumed 14,800 residents for the fiscal year beginning July 1990:

Revenues:

■ Distributions from the Highway Users Fund, the Arizona Lottery, vehicle license fees, sales tax and income tax would provide \$1,966,000 for the general fund, \$990,000 in the highway and streets fund and \$127,000 in the transportation projects fund.

■ Revenue from franchise taxes, building permits and miscellaneous fees would provide \$726,000 for the general fund and \$14,000 for highway and streets fund.

Total revenue: \$2,692,000 in the general fund, \$1,004,000 in the highway fund and \$127,000 in the transportation fund.

Expenses:

■ Salaries and benefits for a city manager, city clerk, engineer, magistrate, accountant, attorney, secretaries and clerks would be \$408,000, out of the general fund.

■ General office expenses would be \$140,000, of which \$70,600 would go for rent on office space. Would be paid from general fund.

■ Street maintenance — \$586,000 from highway and streets fund.

■ Law enforcement — \$622,000 from the general fund.

■ Insurance, special events, deed restrictions, etc. — \$594,000 from the general fund and \$127,000 from transportation projects fund.

Total expenses would be \$1,764,000 from general fund, \$586,000 from highway and streets and \$127,000 from transportation projects.

Surplus would then be \$928,000 in the general fund and \$418,000 in the highway and streets fund.

In addition, there would be \$139,000 required to "start up" the new city.

Incorporation is being suggested as a way to preserve the quality and variety of retirement living in Sun City West, he said.

In helping determine the future of the community, committee members are trying to beat a deadline. In about five years, the Del Webb Communities Inc. is expected to finish building the remaining 3,500 units

See ■ Incorporation, Page B

■ Incorporation

in the community. When that happens, most of the Webb involvement will end leaving the residents to take stronger stands in community planning and development, lobbying with the Legislature and promoting the community.

To research the financial risks of incorporation, committee members interviewed a number of experts in the fields of finance, small city government, street and highway engineering, and law enforcement. They also spoke to Arizona State University educators and the mayors and city managers of Sedona, Cave Creek, Litchfield Park and Apache Junction — all communities that recently incorporated.

If Sun City West were to incorporate and based on a full-time resident population of 14,800, about \$3.083 million would be generated by the city through state revenue sharing funds. Money is obtained from the state highway users fund, state lottery, vehicle license fees, state sales tax and income tax.

The city also would receive about \$740,000 via franchise taxes, building permits and other fees.

Total revenue, then, would be about \$3.8 million.

Expenses for salaries, wages, social security payments and fringe benefits would total about

Committee used guidelines

SUN CITY WEST — Members of a committee studying a charter contract form of incorporation for this community have based their financial proposal on the following assumptions:

■ Residents would continue to contract for trash pickup, and water and sewer handling.

■ Fire protection, street lighting and ambulance service would continue unchanged and will still be outlined on property tax bills.

■ The Sun City West Recreation Centers Board would continue to manage the golf courses and recreational facilities.

■ The Property Owners and Residents Association would continue as a "watchdog" of the community.

■ Incorporation would introduce a city manager/city council form of government wherein the council would establish policy and control expenses. This provides for the hiring of a professional city manager to be responsible for day-to-day activities.

■ The city would hire private companies for municipal services when possible to keep the city payroll at a minimum.

■ There would be no new sales or real estate taxes.

\$408,000. General office expenses, including office rent, would run about \$140,000.

Outlay for street maintenance, law enforcement, insurance, special events, zoning, deed restrictions and other areas would be about \$1.93 million. Start-up expenses to purchase a computer, office furniture and other items would be about \$139,000.

Total cost would be about \$2.6 million. From these figures, the committee members estimate there would be a surplus of about \$1.2 million.

"The revenue that would be

available for the first year of incorporation would more than exceed the highest expectancies of expenses," said Dick Gray, chairman of the finance committee. "It would be reasonable to conclude that the city would be financially sound."

Fall book sale scheduled

SUN CITY — Sun City's annual fall book sale is scheduled for 8 a.m. to 1 p.m. Oct. 29 at the Bell Recreation Center Social Hall, 16820 N. 99th Ave.

Biographies, travel books, geography books, children's books, a



WESTERS FOR SELF GOVERNMENT

SUN CITY WEST

Over the past four years, PORA has directed a thorough study of the various forms of government that are available to Sun City West. Each of these have flaws that make them completely unacceptable except "Self Government" (technically known as incorporation) and "do nothing" which continues the present county government - government that was originally designed for rural areas and intended to provide minimum levels of service.

You and I will choose how we will be governed when we vote on this issue in November, 1989.

"Westers for Self Government" recommend that you vote for self government. "Westers for Self Government" have researched and carefully evaluated the full range of considerations and conclude that you and I will be served much better when we govern ourselves - than by a remote (and sometimes unfriendly) county government.

With self government we make the decisions that control our own destiny.

Vocal opposition states (incorrectly) that self government will introduce local taxes, low income housing and open our recreational facilities to the general public.

We are convinced that fully informed citizens will vote for self government. It is estimated that less than 25% of the residents have attended the "open forums" on incorporation. Therefore, the success of the election will depend on "getting the facts" to the remaining 75%. "Westers for Self Government" has been organized to assume that responsibility.

The following is a list of the major reasons for supporting self government in Sun City West:

- 1 - Beginning approximately July 1, 1990 we will be governed by a City Council that we will have elected from among our neighbors. If we "Do Nothing" we will continue to be governed by the Maricopa County Board of Supervisors. None of whom live in Sun City West and some who are unfriendly to our life style.

2 - Local ordinances that can be enforced by this city government will replace the present deed restrictions that are difficult to enforce.

3 - We will "contract" for street repairs and maintenance. Therefore, we will not have a public works department. We can respond promptly to citizens request for street repairs.

4 - The budget will provide for continuing the "special activities" such as fireworks and concerts in the park.

5 - Zoning control will be transferred from the county, where it is administered by "Foreigners", to control by folks who live in Sun City West and share our goals and life style. Presently there are about 300 acres of undeveloped land in Sun City West not owned by the Del Webb Corporation. It is important that we - not the Maricopa County Board of Supervisors - control the re-zoning of this land.

6 - No new taxes will be required because we will receive over three million dollars in state shared tax refunds and fees.

7 - The city will initiate a contract with the Maricopa County Sheriff to provide fully trained and fully equipped law enforcement officers to patrol (24 hours per day - 7 days a week) within Sun City West - in support of the Posse. This will raise the level of crime prevention.

8 - The first level of government will be transferred to Sun City West from Phoenix. We can then conveniently bring our concerns to our Council Members. We will be able to conveniently meet with our city officials. Further, they will understand our problems since we share common goals and life styles.

9 - Incorporation is a prerequisite for Charter Government. Charter Government gives us the opportunity to customize the operation of Sun City West to meet our particular needs. We can place limits on the elected officials. We can limit their terms of office to two years, prevent more than two consecutive terms and prevent taxation without voter approval.

10 - Would provide the resources to finance an appropriate national public relations program that would emphasize the resort/retirement nature of Sun City West. This program would have a positive effect upon the value of our real estate.

11 - Fire protection would continue under the direction of the

"Sun City West Fire Board" that is responsible for providing for this service (contracted).

12 - We will continue to get water, trash collection, sewer and street lighting service as we do today.

13 - Incorporation at this time will provide for a smooth and orderly transition to manage our future.

Following is a partial list of your friends, neighbors and associates from the crafts shops, the recreational activities and the churches that enthusiastically recommend a vote for self government:

Jim Brucia
Winifred Culler
Norm Anderson
Jerry Leigh
Howard Wilson
Loise Copes
Donald Johnson
Walter Smith
Glen Christiansen
Ted Garing
Norman Olsen
Marshall Garth
Harold Stadnik
Althea Curfman
Jerry Welch
Robert Ode
Hogan Dunlevy
Bob Roth
Glen Weatherby
Lloyd Greenwood
Morey Jensen
John Berg
Dave Gilchrist
Dick Marvin
Lindsay Towns
Doris Spilker
Bill Thomas

George Pike
Al Spanjer
Larry McIntyre
Fran McGuckin
Arve Dahl
Barbara Gerould
Lee Paul
Jack Boswell
Bill Higgins
Malcolm Lund
Bob Madison
Sig Sampson
Leo Storms
Ernest Edison
Elaine McCraith
Allen Powell
Sam Putao
Trevor Reiley
Charlie Coulter
Bill Stewart
Bill Wendt
Ed Meigs
Orville Ebling
Bob Sutherland
Phyllis Schwebke
Margaret Nordin
Sanford Goldstein

Barbara Knudsen
Maurice Garrison
Mary Heiser
Dick Gray
Merrill Dodge
Rita Ode
Jack O'Connor
Wesley Ebert
Frank Cristiano
Tracy Mercer
Jack Petersen
Ray Shrewsbury
Roger Curfman
B J Coulter
Al Driscoll
Cal Kleinschmidt
Aubrey Johnson
Joe Stoffel
Bob McIver
Daryl Milius
Helene Gilchrist
Warren Quenstedt
Solomon Padnick
Clarence Spilker
Howard Schwebke
Jack Henry
Shover Heiser

If you want additional information about "Westers For Self Government" call 584-5454 (Jack Henry) or 975-1955 (Dick Gray). The services of a speakers bureau is also available through either of these telephone numbers.

"WESTERS FOR SELF GOVERNMENT" NEEDS YOUR HELP !

We have prepared a program that is designed to provide information and to encourage a favorable vote. This program will cost about \$4,000. Supporting contributions are required so that we can conduct this program. Can we count on your support ? We will provide a full accounting of the expenditures and contributions.

To actively support "Westers For Self Government" please complete this form to indicate (1) that you want to volunteer your help (2) that you want to contribute to the cause.

NAME _____

ADDRESS _____ PHONE _____

ATTACHED IS MY CONTRIBUTION OF \$ _____

MAKE CHECKS PAYABLE TO: "WESTERS FOR SELF GOVERNMENT"
MAIL TO: JOE STOFFEL, TREASURER (CPA)
19002 124TH DRIVE
SUN CITY WEST, AZ 85375

____ I WOULD LIKE TO VOLUNTEER TO HELP

WESTERS FOR SELF GOVERNMENT

GENERAL CHAIRMAN -----Jack Henry

HONORARY VICE CHAIRMEN

Loise Copes
Allen Powell
Bill Thomas
Marshall Garth
Al Driscoll
Maurice Garrison
Barbara Knudsen
Charlie Coulter

With election 1 day off, incorporation continues to split Sun City West

By Phyllis Gillespie
The Arizona Republic

The incorporation election in Sun City West on Tuesday is going to pass by 65 percent to 35 percent, or fail by 60 percent to 40 percent — depending on whom you ask.

Whatever the voting percentages may be, the fact is that the question of incorporation has split apart this "active retirement community," which is the last sizable collection of residences along a section of Northwest Grand Avenue.

Both sides have called their opponents liars in public meetings. Opposition speakers have been booed down by audiences.

An estimated 18,000 people live full- or part-time in the usually serene, 9-square-mile community sprinkled with communal golf courses, swimming pools and recreation centers. It was established in 1978 and, when completely developed, will accommodate about 25,000 residents.

"It used to be that it didn't matter if your neighbor was a Democrat or Republican, because there weren't any politics out here," said Charles Leigh, a nine-year resident of Sun City West.

"Now, all of a sudden, neighbor is afraid to talk to neighbor."

There has even been talk of banning the topic of incorporation at

one of the community's seven golf courses.

Daryl Milius, co-chairman of Westers for Self Government, is predicting that 65 percent of the estimated 12,000 registered voters will cast ballots for incorporation.

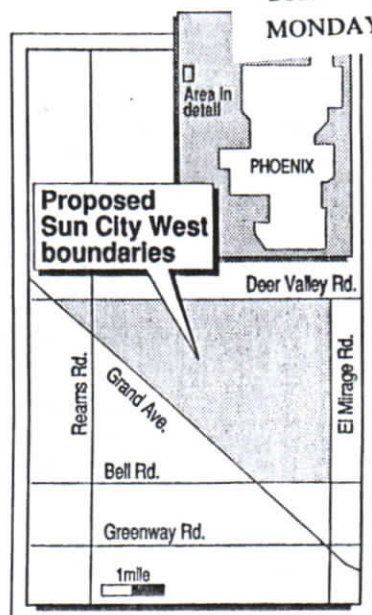
Wallace L. Fox, a spokesman for Sun City West Anti-Incorporation Residents, or SCWAIR, predicts 60 percent of the voters will oppose incorporation.

If voters approve the measure, Sun City West will become the state's 85th municipality and the second incorporated retirement community. Neighboring Youngtown was incorporated in 1960.

Residents of Green Valley, an affluent retirement community south of Tucson, voted 6,223 to 2,215 last Tuesday to reject incorporation.

The divisive topic first arose nearly four years ago, when some members of the Sun City West Property Owners and Residents Association, or PORA, started wondering what would happen after the developer, the Del Webb Corp., completes its work and pulls out all the employees who keep everything running smoothly. That is scheduled to happen in the mid-1990s.

After a 3½-year study, PORA's Governance Committee recommended



that Sun City West incorporate and establish a charter-contract form of government, which would not allow any form of local sales or property tax or bonded indebtedness without a vote of the people.

"They try to say that when Del Webb leaves, there will be a big void," said Leigh, a member of SCWAIR.

"Well, Del Webb has been out of Sun City for years, and they're still doing just fine."

Facts or misinformation — also depending on whom you ask — have been flying around the community since the Westers for Self Government began circulating the petition that brought about the election. The group

— See VOLATILE, page B2

gathered more than twice the needed signatures by September, and the Maricopa County Board of Supervisors set the election date.

If Sun City West incorporates, it finally will get its fair share of taxes that the state collects and then redistributes to cities and towns across the state, the pro-incorporation supporters say. That could amount to more than \$3 million annually, more than enough to fund the limited government Sun City West would require, they say.

Most of the amenities already are installed and being paid for through user fees, said Morey Jensen, PORA vice president. The state-shared revenues would be enough without adding a city sales or property tax, he said.

"Without incorporation, we remain a penniless subdivision in the county," Jensen said.

The Westers for Self Government figure the first budget, from November 1989 through December 1990, would have revenues of \$2,519,000, expenditures of \$1,263,000 and a surplus of \$1,256,000. In 1991, the revenue is estimated at \$3,842,000, with expenses of \$2,205,000 and a surplus of \$1,637,000.

Howard W. Peterson, a certified public accountant and Sun City West pro-incorporation resident, called the estimates "reasonable."

Fox said he estimates that revenues will be about \$2,100,000 but expenditures could be as high as \$12 million, based on budgets from surrounding towns and cities.

"Their figures are completely unrealistic," he said of incorporation advocates.

Different futures seen with SCW incorporation

4-8-88
Second in a series
By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — If Sun City West were really a city, it would receive millions of dollars from the state in shared revenue funds.

But that money might not be a cure for all the problems the community would face.

Cathy Connolly of the League of Arizona Cities and Towns said if Sun City West had been incorporated during the last fiscal year, it would have received \$190.62 per person in shared state revenue funds.

The revenue funds come from state sales and income taxes, highway user fund revenue, vehicle license taxes and local transportation assistance funds. The mid-decade census places

Sun City West's population at 10,450. With that population figure, Sun City West would have received more than \$1 million in state shared revenue for this fiscal year.

Sun City West has grown since the mid-decade census and Del E. Webb Communities Inc. estimates that the population of the community when fully developed will be 25,000. Connolly said Sun City West could hold a special census to get a more accurate population figure.

While the shared revenue funds for the whole community would be in the millions of dollars, Connolly said that for most incorporated areas that is not enough.

"There are no cities and towns in this state that rely or depend solely on those state

revenues," Connolly said. "Some sort of form of local taxation is automatic."

Connolly said most communities that incorporate have passed local sales taxes. Unlike bond issues or property taxes, sales taxes can be instituted by city councils without a vote of the people. The sales tax is really a transaction privilege tax because it includes more than just retail sales. Construction, telecommunications and utilities would also be taxed, Connolly said.

But Sun City West Ernest Edison said the community could survive without starting taxation and without the state revenue sharing funds. Edison studied the incorporation issue in a 1986 report on the options available to Sun City West after

Del Webb finishes building the community.

Edison said other incorporating cities need to have a lot of revenue because they are expanding and building roads. Sun City West would not, because all the facilities would be put up by Del Webb and be in place before incorporation. Also, revenue sharing funds have restrictions on how the money is to be spent, Edison said. An example: Some money from the gas tax has to be used for transportation and road maintenance.

Edison said there would be little change in what the residents have to pay for services.

"Sun City West would be unique in that 90 percent of services required are being paid for already by the residents,"

Edison said.

The only additional services that an incorporated Sun City West would need would be police protection and road maintenance, Edison said. Both can be contracted out to the county.

Incorporation may benefit how the city looks by giving it more authority over its planning and zoning, Connolly said.

"By the very nature of county zoning it can't be reflective of local communities," she said.

Sun City West resident Allen Powell is chairman of the Property Owners and Residents Association subcommittee that is examining planning and zoning issues in an incorporated Sun City West.

"We're in a fortunate position. See Incorporation, A3"

Revenue changes certain with

NEWS-SUN 4-8-88
 —From A1

tion," Powell said. "The community is going to be pretty much built out by Del Webb and they have a master plan. All we have to do is adopt that master plan for our own use."

Loise Copes, a past president of PORA, said that when people complained to her about violations of deed restrictions there was little she could do. An incorporated city would be able to enforce deed restrictions.

"I had a lot of trouble when I was president of PORA because I didn't have the power," Copes said.

Connolly said that sometimes people run into problems when

their expectations about incorporation are not met. Often promises are made during the incorporation process that are not kept by future city councils, she said.

"You can never second-guess what a city council will do," Connolly said.

Edison said people should not view incorporation as a panacea for the community's problems.

"If they would think that it would solve all their problems, I think they would be living in a dream world," Edison said.

An incorporated town is only required to hire a chief law enforcement officer and a town clerk, Connolly said. If the pub-

REVENUE SOURCES

	PER CAPITA	TOTAL
Sales tax	\$ 54.67	\$ 571,302
Income tax	\$ 53.71	\$ 561,270
Highway User Revenue Fund	\$ 59.88	\$ 625,746
Vehicle License Tax	\$ 13.34	\$ 139,403
Local Transportation Assistance Fund	\$ 9.02	\$ 94,259
TOTAL	\$190.62	\$1,991,980

The total of \$1,991,980 is what Sun City West would have received if it was an incorporated entity during this current fiscal year. The \$1,991,980 total is based on \$190.62 a person times the 1985 mid-decade census count of 10,450 people.

lic safety is contracted out to the county then the chief law enforcement official is the sheriff. All the rest of the town officials can be volunteer. Connolly said that many towns hire

a town planner, but first of all they hire a town lawyer.

"You've got to have an attorney. Today's government ... is too complicated to get along without one," Connolly said.

incorporation

The Arizona Revised Statutes state that there are two ways an area can incorporate. One way is to submit a petition to the county board of supervisors with two-thirds of the signatures of qualified voters in the area considering incorporation. Or 10 percent of the voters in the area can petition the board of supervisors for an election on the issue.

If a majority of voters favors incorporation in the election then the area is incorporated.

Connolly said the best time of year to incorporate is early in the fiscal year because the county is required by law to

continue providing the services to the incorporated area until the beginning of the next fiscal year after incorporation. This gives the town time to set up house, Connolly said.

After the incorporation, the county board of supervisors appoints a city council. The council then has to set up the first election and map out a budget, Connolly said. Because revenue sharing funds are not realized right away, she said, usually the town takes out a warrant from a bank. Warrants are like loans because interest is charged on them.

New group aims for SCW incorporation

1989 VOTE: Leader says result will differ

MICHAEL MARESH
DAILY NEWS-SUN

4-23-03

Almost 14 years after residents voted down incorporation in Sun City West, another group has taken up the cause.

In November 1989, residents voted against incorporating the community 57 percent to 43 percent.

City Committee President Jim Parker thinks this time residents will be better informed and will embrace the change once all the facts are known.

The incorporation issue in 1989 created unrest among residents as the Westers for Self-Government squared off against the Sun City West Anti-Incorporation Residents.

More than 85 percent, or 13,100 Sun City West registered voters, cast ballots in what was then the largest election turnout in the community's short history. The 1990 census listed the community's population at 15,997.

The City Committee, the new group taking up the incorporation effort, wants essentially the same things the 1989 self-government group wanted. Parker said incorporation was voted down then because of the rush to change the community's government. At that, he said, the vote was relatively close.

"I think the consensus of the people I talked to is, they believe that in 1989 they did not take enough time to educate the people of Sun City West," he said.

He said that mistake will not be repeated, adding that the advantages outweigh the disadvantages.

"We would be home-ruled, and then you control your own destiny," he said, adding that incorporation would result in a mayor and six council members governing the community instead of relying on county officials not living in Sun City West.

Parker said Sun City West would

have more impact with outside agencies if the community was a municipality. The Sun City West Property Owners and Residents Association is currently the quasi-governmental arm of the community.

Parker said the latest movement was brought up more than a year ago, but the group decided to wait to deliver its message, as two important elections were pending. He said the Recreation Centers of Sun City West governing-board election and the Sun City West Owners for Open Government bylaw vote resulted in the delay.

"Out of respect for SCWOOG and the RCSCW, we postponed it," he said.

Parker said the decision to consider incorporation was brought to the forefront by the divisiveness of the community. Now, he said, the City Committee is trying to get its message out through its Web site at www.scwcc.org, small groups and a future town-hall meeting.

Parker said the perception that additional taxes would be the result of incorporation is false. He said the community would benefit since it already has roads, several places for a City Hall, as well as no school district. He added that the residents of the community already pay for utilities and fire-department service, so there would be no need for a public-works department.

The city of Goodyear, with a population of about 30,000 residents, does have a property and sales tax to help them maintain services. Larry Price, finance director for Goodyear, said its portion of state-sharing revenue is \$5.4 million for the current fiscal year and \$5 million for the upcoming year.

Price said the sales tax the city charges is 2 percent for most purchases, 4 percent for bars and restaurants and 1.2 percent on purchases of \$2,000 or more.

"Whether Sun City West would need a city sales tax to help pay for services would depend on what the

See COUNTY, A5

COUNTY: Supervisor Wilson says Sun City West incorporation unwise

From A1

community needs and wants," Price said.

He said the community must realize that the county would no longer provide law-enforcement services or roadway maintenance if incorporation were to occur.

"What resources do you have?" he said, is the question residents need to ask themselves.

Goodyear public-information Officer Paula Ilardo said the primary reason for the city's sales tax is the unpredictably of state-sharing revenues.

"It is hard to predict," she said, adding that the revenues Goodyear has been receiving have not been enough to pay for the necessary services.

Parker said the City Committee will be prepared to answer questions.

"We have a lot of work ahead of us," he said. "I am very confident. I would not do all this if I was not confident. This is just so terribly important. Incorporation means a tremendous amount to me."

RCSCW Director Patrick McBurnett said that back in 1989 there were good people on both sides of the issue,

and Monday said he had studied the issue more closely. McBurnett said he will oppose any such proposal, even though there are still some good people heading the new committee.

Maricopa County Supervisor Max Wilson said residents of Sun City West have been asking him his opinion on incorporation. He said regardless of what the community does, he would still be representing residents. However, the supervisor said he remembers how divided Litchfield Park became when incorporation was passed in his hometown.

"I thought it was better before," he said, adding that the benefits depend on the service the community is receiving from the county.

Wilson said there was little middle ground when Litchfield Park incorporated. Residents either supported or opposed it.

He said Sun City West incorporating is not a good idea.

"We provide a lot more services to them than they can provide to themselves," Wilson said. "My reminder is, if it ain't broke, do not fix it."

PORA President Randy Fuller said those against

incorporation are convinced taxes would have to be increased eventually if the effort is successful. He said the City Committee is hoping for revenue from the state, but he wonders what would happen if those funds were to dry up or decrease.

"The only alternative is increased taxation," he said.

Fuller said various community leaders are already concerned the state could reduce the revenues municipalities receive, and added that Sun City West would be in the same situation if it were to incorporate. He said since no elected official can assure him this could not happen, he cannot support incorporation as a resident.

As the president of PORA, Fuller said, he is responsible for taking into account what the members want, and added he has yet to hear from one who supports the concept.

"I think the people are satisfied right now," he said.

He added that if a vote was taken today, he is confident incorporation would be defeated, but added that a different outcome could result in six months.

Michael Maresh can be reached at 876-2513 or mmaresh@aztrib.com.

Incorporation drive initiated by PORA

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — The Property Owners and Residents Association voted this morning to sponsor a petition that could lead to Sun City West's incorporation by the end of 1989.

With a chorus of "ayes" and a handful of shouted "nays," about 450 members decided to sponsor the first step in the process of determining whether the community should incorporate with a charter government.

The incorporation petition would tentatively be circulated from February 1989 to July 1989 with community discussion and information meetings starting now and lasting through the petition period.

"This is not a meeting or a vote on whether Sun City West should incorporate or not. The PORA board has not taken a stand," PORA President Sandy Goldstein said before the vote.

He said it was a meeting to hear the PORA governance

committee's recommendations and to decide whether PORA should "initiate and conduct a petition drive which will allow the community to decide whether or not to incorporate."

Sun City West, like Sun City, is now unincorporated and falls under the jurisdiction of Maricopa County. A vote to incorporate Sun City failed in 1964.

Should the Sun City West petition drive gather signatures of 10 percent of the electorate, the county will call an election on incorporation. If the petition drive gathers signatures from more than two-thirds of the community, then the county will automatically declare Sun City West incorporated.

The report recommending incorporation with a charter government was the result of more than three years of work by the PORA governance committee.

The committee's final report recommendations:

See PORA, A4

11-10-88

11-10-88
NEWS-SUN
-From A1

- That the PORA board vote to have the report presented to the membership.

- That the membership be asked to vote to initiate a petition for incorporation and to have an election on the issue.

The report also states that an incorporated Sun City West should be defined in the petition as subject to the following conditions:

- An incorporated Sun City West would be governed under a charter adopted by vote of the residents.

- City services would be provided by entering into contracts with private companies or other agencies qualified to provide them. Sun City West would be a "contract city."

- Only those services now provided by Maricopa County and Del Webb Communities Inc. would become municipally supported services. Residents would

continue to pay for private services they now pay to receive.

Ernie Edison, board member and governance committee member, said that the committee does not approve and would not recommend a regular incorporation but it recommends incorporation with a charter government, which contracts out for its services such as fire and police protection.

"If there's a way to keep this community as it is ... that we feel is the way to do it. We see very little problem with it but we see an awful lot of possibilities," Edison said.

He said a charter can prevent the city government from raising property and sales taxes and government salaries without a voter referendum. Phoenix, Scottsdale, Casa Grande, Prescott, Peoria, Tucson and Avondale are some of the 16 cities in Arizona that have charter governments.

Edison said the incorporation vote would have to take place and then 25 percent of the residents would petition for a charter. Fourteen residents would then be elected to draw up the charter.

The governance committee recommended having community information meetings and discussion from now until July 1989 during the incorporation process. It also recommended circulating the incorporation petition from February 1989 to July 1989 and a vote on incorporation scheduled for December 1989.

Al Spanjer, PORA board member and committee member, told the membership this morning about the governance committee's recommended timetable.

He said once a community incorporates, the county must continue to provide services to the area until the next July 1. That means it would be good to have

an incorporation election about six or seven months prior to July 1 to get the community in order while the county still governs it.

The Property Owners and Residents Association (PORA) board voted unanimously Wednesday afternoon to bring the governance committee's findings to the membership today to see if the members would sponsor a petition drive.

Incorporation could let in low cost housing, charges foe

by DAN BURNETTE
News-Sun staff

SUN CITY WEST — Incorporation will bring low-cost housing and affirmative action to the community and will allow residents of neighboring areas to use Sun City West recreation centers, the leader of an anti-incorporation group has charged in a position paper.

But one official of the Sun City West Property Owners and Residents Association, which is sponsoring the petition drive, called the statements "outright lies."

Meanwhile, the president of the recreation centers advisory board said Friday that while the board hasn't and won't take a position on incorporation, creation of a municipal government in Sun City West will have no

effect on the members-only status of the centers.

Phil Vision, who is facilitator for an as-yet-unnamed group that will oppose a petition drive to incorporate Sun City West, made his statements in a position paper he will present next week. Vision mailed an advance copy of the paper to the News-Sun, where it arrived Friday.

Vision wrote in his position paper, "After researching and studying the Arizona Revised Statutes and the effects of recent Congressional legislative actions regarding both the Civil Rights Restoration Act of 1988 and the Shaw Amendment to the Fair Housing Amendments Act, Mr. Vision is concerned that if Sun City West should incorporate to receive state revenue sharing, the community, now a most dis-

criminating private resort community, could be governed pursuant to and in accordance with federal and state affirmative action goals."

"Public funds may open the door to public housing in Sun City West, making available present facilities to residents of neighboring communities like El Mirage, Surprise, Peoria and Glendale without regard to race, creed, color, age, sex or national origin," Vision wrote.

The Civil Rights Restoration Act re-codified the Civil Rights Act of 1964. The Shaw Amendment to the Fair Housing Act was a failed proposal that proponents said would protect the rights of retirement communities like the Sun Cities to keep out families with children.

Vision's position paper is to be

delivered next Wednesday at an organizational meeting of the group that will oppose incorporation. The meeting will be at 7 p.m. at 12638 Foxfire Drive. The meeting will set goals for the group and elect officers.

Friday afternoon, Ernie Edison, chairman of the PORA Governance Committee, said that Vision's statements "are outright lies and he knows it."

"Maricopa County right now has the authority to put low-cost housing wherever it sees fit, incorporated or not incorporated," Edison said.

As a practical matter, the county is not likely to put low-cost housing in Sun City West because there will be no land left for residential development and the land prices would be too high if it were available, said Al

Spanjer, president of PORA.

Edison said "I'm not sure why he's raising affirmative action. The community would hire anybody who could do the job regardless of race or anything else. As far as it goes, we have different races, colors and everything else living here right now."

Spanjer said of the affirmative action issue, "It sounds real scary. But what does it really mean? Anyone affected by affirmative action right now would still be affected by it under incorporation. Nothing would change."

"It's very discouraging to hear someone as intelligent as Phil use these kinds of of scare tactics because I know he knows better," Edison said. He said he and Vision worked together when Vision was a PORA board member.

Edison said incorporation would have no effect on the members-only status of the recreation centers. He said Westbrook Village in Peoria, Sun

City Vistoso near Tucson and Sun Village in Surprise all are parts of incorporated communities.

"You go to Westbrook Village and try to use their swimming pool and I'll guarantee you won't get in unless you live there and are a member," Edison said.

Virginia Ritson, president of the Sun City West Recreation Centers Advisory Board, said "the recreation centers are a separate entity; they're private, so incorporation would not affect anything regarding its operations. It is for the use of Sun City West residents who pay the membership. Membership is not based on politics, race, religious beliefs or anything else."

Ritson said the recreation centers doesn't want to be involved in the incorporation

issue.

"We are completely apolitical," Ritson said.

PORA on Thursday launched the drive to collect at least 1,200 valid signatures of Sun City West registered voters. The number, representing 10 percent of the electorate, is required to call an election on whether the community should incorporate.

If enough valid signatures are collected, the Maricopa County Elections Department will call an election, which probably would be Nov. 14, PORA officials have said.

New group forms to resist incorporation

SC INDEP 2/21-27/90

"Protection of lifestyle" is the No. 1 goal of the newly organized Retirement Community Association of Sun City West, Inc.

RCA president Wally Fox says the group, formed to resist incorporation, has completed its organizational activities.

Memberships now are open to all Sun City West residents.

Mr. Fox, who was selected as president of RCA, says that organization will serve as a listener/voice for some 3,700 homeowners who are not legal voting residents of Arizona.

"This will be the only civic organization giving these owners representation," he adds.

At its Feb. 16 meeting, Mr. Fox says the ad hoc organizers of RCA discussed the golf cart tax and the proposed legislative changes in the funds to be allocated to counties for fire protection tax relief.

As for the golf cart tax, he says it's his opinion the \$30 annual assessment will be rescinded.

He advises a study of the fire protection tax plan, as he believes this program will be reduced by the state lawmakers. It will, ultimately, result in an extra \$14 per year tax increase (over a five-year period) for Sun City West residents, he says.

Mr. Fox says a meeting with the board of directors of the Sun City Ambassadors is indicated.

RCA also has called into question recent action of the Sun City West Property Owners Residents Association in a zoning issue.

The new community associa-

tion charges that "PORA had approved deed variances without authority, without board approval and without contacting or notifying affected residences."

PORA's actions, says Mr. Fox "were not in the interest of the community."

Morey Jensen, Property Owners board president, says PORA has a planning and zoning committee with qualified people, and either concurs, or objects, to zoning and variance matters.

"Yes, they come to us, (PORA)" he says. "Mr. Fox should be pleased that we do this."

Mr. Jensen explains that, while PORA has a recommending role, Maricopa County is the final arbiter, and the county is less strict than PORA.

"Often when we object (to a request for variance) the county listens to what we say."

PORA, says Mr. Jensen, is considered the only one to contact in planning and zoning matters, "and has been, for 12 years.

"We are the defenders of the deed restrictions in Sun City West," says PORA President Jensen.

RCA president Fox says memberships in the new organization are available for \$5 for the first year.

Serving with Mr. Fox on the RCA committee were the following: Rich Dean, Phyllis Bendler, William Hannon, Edgar Hilke, Phillip Knox, Tony Mastroardi, Herb Nisenshal, Mel Pamell, Florence Siemon, Gordon Stowe, Harold McBride, Chuck Leigh and Andy Wilkiewicz.

Sun City West has eased off incorporation

Expansion on front burner

By TIFFANY MEANS
Daily News-Sun staff

SUN CITY WEST — A year after voters rejected incorporation through a special election, leaders of both sides of the community-wide debate still feel its divisive effects.

Residents said "no" to the proposal Nov. 14, 1989, by a majority vote of 58 percent.

Although many people on both sides said they maintain their convictions of last November, they aren't sure when, how or if the issue again will become a community concern.

"I'm still very disappointed that it didn't pass, and for very selfish reasons; it would have been in the best interest of the people of the community," Ernie Edison said.

Edison served as chairman of the Property Owners Residents Association Governance Committee, which researched incorporation and presented forums on the issue.

"With Del Webb (possibly) expanding, I think the issue of incorporation will be set aside for the time being," Edison said. "I suspect the next shot at incorporation will probably come from our sister city (Sun City)."

Del Webb Communities Inc., the Sun City West developer, announced in early November that it may expand the community by as many as 3,000 houses.

An expansion likely would delay the departure of Webb until some time between 1996 and 1999.

Phil Vision, who served as chairman of Sun City West Anti-Incorporation Residents, also believes the possibility of expansion will quell any near-future attempts to raise the issue, he said.

An expansion of the community would justify Vision's con-

tinued opposition of incorporation and increase the need for residents to work together for the benefit of Sun City West, he said.

"The fact that Del Webb is planning an expansion ... (shows that) there really was no urgency," Vision said. "If an election were held today, I think it would be overwhelmingly against incorporation."

Barbara Knudsen, who worked with Westers for Self-Government, said she believes that many residents who might choose to support incorporation would be daunted by opposition from Webb.

"They are not going to give any major control to any organization, or be it incorporation, until they are ready to phase out," Knudsen said. "It would be spinning our wheels to try and bring the issue up at this time."

Marvin Goldberg, who served as chairman of Sun City West Residents United Against Incorporation, said that regardless of the possibility of an expansion, opposition of incorporation is valid.

"The reasons that we cited are absolutely applicable today," Goldberg said.

Another factor that might delay the recurrence of incorporation as a community concern is that established organizations, such as PORA, that supported incorporation, suffered in membership and public backing after the election, he said.

"There is no question that if this issue is raised again tomorrow that it wouldn't take more than 48 to 72 hours to bring together a great many people who would organize again and fight it and beat it," Goldberg said.

PORA discusses incorporation view

RCA/SCW reinstates charter to oppose growing efforts

By Charlene Patti Bisson
Independent Newspapers

5-6-04
Chuck Ullman wants everyone to know the scuttlebutt is anything but true.

The president of the Sun City West Property Owners and Residents Association insists PORA is not changing its view on incorporation. Mr. Ullman reiterated his position during his president's report at the May 11 PORA meeting.

Mr. Ullman heard rumors around Sun City West that PORA is reconsidering its stance.

"Whoever is spreading rumors like that needs to stop," Mr. Ullman said. "PORA has not changed its position in 2 1/2 years. But it is PORA's responsibility to study all forms of government at all times. Should the majority of Sun City West vote for incorporation, PORA would have to take a position because we represent the residents."

Mr. Ullman explained during the last incorporation attempt in the late-1990s many citizens believed PORA was supporting it so PORA lost about 30 percent of its membership.

- www.scwcc.org
- www.suncitywest.us

"PORA wasn't positive of its position," Mr. Ullman said. "A lot perceived PORA as for it."

Years later, PORA publicly announced its stance on incorporation, which remains the same today, Mr. Ullman said.

The Sun City West City Committee continues its efforts to incorporate Sun City West.

According to Jeff Latham, a member of the SCWCC executive committee, incorporation progress exists but moves slower in the summer due to residents on vacation.

"We are active but inactive during the summer — a lot of people are away," Mr. Latham said.

Donna Parker, wife of SCWCC President Jim Parker, said their efforts lately are limited because the couple has been between states.

The group's first meeting held Feb. 28 drew about 430

See PORA — Page 10

PORA

Continued From Page 1

people. Mr. Parker introduced the steering committee, gave a history state-shared revenue and showed how it could help Sun City West. Several other issues were discussed including infrastructure and growth. For more information, visit www.scwcc.org.

The SCWCC believes the best way for the community to keep its individuality and keep up with local needs is to obtain its "fair share of tax dollars from the state of Arizona through revenue sharing."

Those opposing incorporation disagree. The Retirement Community Association of Sun City West, recently reinstated its charter after disbanding upon defeating incorporation efforts in 1989. The group donated its

remaining funds to Mothers Against Drunk Driving when it disbanded.

Wallace L. Fox, a founding member of the RCA/SCW of 1988 and public relations chairman, said the group has reorganized to thwart the efforts of incorporation.

"That is our full intent — to make sure it doesn't happen again," said Mr. Fox, who is an 18-year resident of the community. "We believe they (SCWCC) fully intend to further their efforts."

The RCA/SCW's mission:

- Protect the lifestyle of Sun City West residents;
- Promote county government administration of the area known as Sun City West and to help in developing

good lines of communication between residents and county government. To aid in resolving any known or unknown problems or opportunities between the residents or county government;

- Cooperate with and support other organizations of retirees, retirement community associations, and any other organization whose purposes and aims are to provide benefits for adult retirees.

Membership is open to part-time and full-time residents. Dues are \$5 each year.

Larger contributions are welcome to offset original setup costs.

Membership donations can be mailed to: Retirement Community Association, P.O. Box 5586, Sun City West, 85376. Checks can be made to RCA/SCW.

Sun City West resident John Brown is founding president of the newly formed RCA/SCW.

"We have had a pretty good response," Mr. Fox said. "People can also e-mail me."

Mr. Fox can be reached at wallyfox3@juno.com.

SUN CITIES INDEPENDENT

August 4, 2004

SCW incorporation on holding pattern

A March 2005 vote unlikely

By Cecilia Chan
Independent Newspapers

Any hopes to bring the question of cityhood for Sun City West to a vote in March is out the window.

Sun City West City Committee's petition to incorporate is stuck somewhere in limbo.

"We are at a stalemate until we get the petition OK'd from the county," said Dick Newman, group treasurer. "We should have heard something back."

Mr. Newman said the committee submitted to the county

in April the wording for the petition and the boundary of the area proposed for incorporation.

Once the county signs off, the group would have 180 days to circulate the petition for signatures. Ten percent of the registered voters in Sun City West would need to sign the petition asking for a vote to be held.

Maricopa County Clerk of the Board Fran McCaroll said she has not received any documents from the group. She and other county officials met with

See **Vote** — Page 7

Vote

Continued From Page 1

the Sun City West City Committee in January to go over what needed to be done in order to incorporate.

"I don't know where they sent the stuff to," she said. "I can't believe they would wait this long and not hear anything back from us."

Kristi Passarelli with the county elections department said she has yet to receive a petition from them.

Sun City West City Committee filed a campaign finance disclosure in June with the county. The group raised \$1,220 to date and spent \$482.45, according to the documents.

Although Mr. Newman anticipated the group will gear up in October when residents return, committee member Tom Young was unsure. Mr. Young was listed as the vice president on the group's Web site.

"At this point we don't know what we are going to do," he said. "There seems to be a lot of hostility against getting incorporated."

He also said the group was at a standstill with President Jim Parker out of the state for a family emergency. The group also lost its secretary, Dick Gray, who resigned for personal reasons.

"We're just waiting to see if the president comes back," Mr. Young said.

Meanwhile, the Retirement Community Association of Sun City West, which opposes incorporation, reported it was seeking to add more members to its group.

Post your comments on this issue at newsblog.info/0302

News editor Cecilia Chan can be reached at 972-6101 or cchan@newszap.com

Petition signatures delivered

By CHRISTINE SELIGA
News-Sun staff

PHOENIX — Petitions calling for an election on incorporation of Sun City West were submitted to Maricopa County this morning.

If the petitions are valid, the county board of supervisors must call an election on incorporation within 120 days.

The petitions, with 2,720 signatures, were turned this morning in to Cherie Pennington, clerk of the board of supervisors. Also turned in were letters of approval from five nearby cities.

On hand were supervisor Carole Carpenter, a Phoenix Democrat whose District 4 includes Sun City West, and two members of the Property Owners and Residents Association (PORA), Morey Jensen and Allen Powell. Jensen is the first vice president and Powell is a member of PORA's governance

committee.

The PORA membership, a homeowners group in Sun City West, voted in November to sponsor a petition to ask for an election on incorporation and conduct five public meetings on the issue of incorporation.

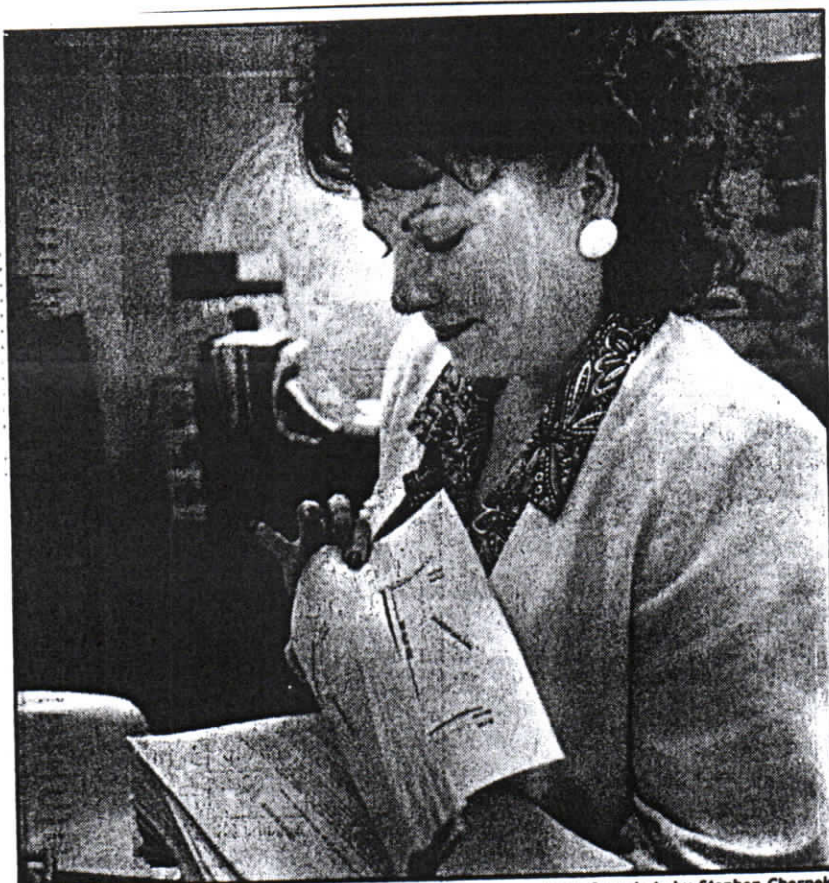
After a three-year study, the PORA governance committee recommended to the board and the membership that the petition drive and meetings be conducted.

Petition signatures were gathered by about 53 volunteers from Feb. 22 to March 23.

The election has to be held within 120 days of filing the petitions. If the petitions had been filed in March the election would have taken place in the summer when many people are away.

The PORA governance committee decided to hold the petitions and turn them in for a fall

See PORA, A5



News-Sun photo by Stephen Cherek

DELIVERED — Cherie Pennington, clerk of the county Board of Supervisors, holds petitions turned in today by the Sun City West Property Owners and Residents Association.

PORA turns in petition names

—From A1 election date.

The petitions had to be signed by at least 10 percent of the registered voters in Sun City West, or about 1,160 people. The governance committee collected twice as many signatures as needed to make sure there would be enough valid signatures.

Now that the petitions are turned in, the board of supervisors has 60 days to announce the date of the election.

The governance committee has said it would like to have the election Nov. 14 and Jensen said that would probably be the day of the election.

The county will pay the costs of the election, he said.

Now the petitions have to be reviewed by the county.

From there the election board will review the petitions to make sure there are sufficient sign-

atures and that the signatures are valid.

Copies of the petitions will go to the planning and development department to ensure that the boundary description and map included in the petition are correct, Pennington said.

Phil Vision, a Sun City West resident who is against incorporation, had previously said he would challenge the petition signatures.

On Monday, Vision said he had changed his mind because of a number of telephone calls he received from people against incorporation.

"Many people called because they were against incorporation and they signed and wanted to vote to once and for all defeat incorporation . . . so I'm going along with these people who say don't challenge it," Vision said.

Pouring gas on the fire

Fliers spread reports against incorporation

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — Pamphlets urging people to vote against incorporation have angered some residents who believe the information is misleading and may have been distributed by illegal means.

Several members of the Property Owners and Residents Association (PORA), a local homeowners group, said Friday morning they were disturbed by the allegations made in the fliers, which have been distributed in the area.

The community will probably vote on the issue of incorporation this fall. PORA has sponsored a petition to ask for an election on incorporation. Signatures have been collected and are expected to be filed Tuesday with the Maricopa County Recorder's office.

Dick Gray is disgusted with what he called "the absolute disregard for the truth" displayed in the pamphlets. Gray is

a PORA member who led a PORA study of the finances of an incorporated Sun City West.

He said Friday that some fliers were found throughout the community several weeks ago but that the last flier was distributed about a week ago. That flier had the words, "Vote No!" across the top of it.

Gray said the flier's statement that Sun City West would lose the services of the Posse and the Prides if it incorporated is not true.

He said that it has often been stated that the community would not set up its own police department but would contract with the Sheriff's office for police protection, which would supplement the work of the Posse.

"It's been emphatically stated time and time and time again," Gray said.

Another statement on the flier says "Litchfield Park recently incorporated and immediately added a sales tax. Litchfield Park now faces a budget deficit that will result in again raising taxes."

While Litchfield Park did institute a sales tax after incorporation, it is not facing a budget deficit Mayor Richard Meese said Friday.

"No, it's (the budget) balanced," he said.

Gray said governance committee members have heard that some pamphlets are being slipped into people's mail slots.

Helen Kennedy, Sun City postmaster, said Friday it is illegal to deposit anything that does not have postage on it in a postal receptacle. A mail slot on a house is a postal receptacle.

"Mail receptacles are for mail that has postage paid," Kennedy said.

She said she has gotten about three or four complaints in the last week about the anti-incorporation literature. She is having the people who complained send her copies of what they received.

"Normally we find that people didn't realize it's illegal to do it. When they find out, they stop," she said.

She said she will contact the names of the people on the sheets, talk to the people and explain they need postage and collect the postage.

Eileen Carey, 14210 Parkland Drive, said she received a copy of the flier last Saturday tucked into the rubber band around her News-Sun.

News-Sun Advertising Director Don Leyshon said the paper has not been paid to insert the flier into the paper.

"It would have to be somebody going around and putting them on," he said Friday.

Leyshon said he should probably find out who did it and send him a bill.

The sheet asks people to send donations to help oppose incorporation to SWAIR (Sun City West Anti-Incorporation) c/o Phil Vision, and to Anti-Incorporation, 12619 Foxfire Drive.

Marvin Goldberg, spokesman for Sun City West Residents Against Incorporation, lives at 12619 Foxfire Drive. Neither Goldberg nor Vision could be reached for comment.

Allen Powell sees another alarming trend in the literature. He is a PORA governance committee member and member of Westers for Self-Government.

"The problem I see is we're getting something we wanted to avoid when we first started out and that is polarization," he said.

Powell called the statements on the fliers outrageous, deceptive and outright fraudulent.

SCW

Group fights to keep Sun City West 'as is'

By LAURIE HURD-MOORE
Sun Cities Independent

Just say no.
At least that's what organizers of an anti-incorporation group in Sun City West are hoping their fellow citizens will say this November.

At that time, residents of the retirement community will be asked to determine the future form of government for their community.

"My friends and neighbors ... continue to say no to the siren voices of those who are addicted to the sweet aroma of revenue sharing and incorporation," sounded resident Philip Vision.

Mr. Vision was one of six speakers at the first general meeting of Sun City West Residents United Against Incorporation.

The event took place June 6 in a meeting room at Western Savings Bank, 19022 R.H. Johnson Blvd., Sun City West.

Mr. Vision was joined by Sun

City West residents Paul Eller, Elmer Grimstad, Marvin Goldberg, Harry Noodleman and Carl Showalter.

All of the speakers, with the exception of Mr. Vision, are members of the group's executive committee.

Marvin Goldberg told those in attendance that his organization is fighting to keep Sun City West "as it is."

Mr. Vision, a one-time advocate of incorporation, presented a number of reasons why the community should refrain from self-government.

"I'm the same Phil Vision who only a year ago or so was writing articles in the local newspaper advocating political incorporation and extolling the virtues of self-government. I plead guilty ... I am the same person," he says.

Mr. Vision told those present that as a member of the Property Owners and Residents Association's governance committee, he watched as resident's questions were "arbitrarily dismissed" or

"flippantly explained away" by PORA.

He feels studies promoting incorporation have failed to answer serious questions and concerns.

"They are concerns that could drastically affect the future existence of our most discriminating private resort retirement community."

According to Mr. Vision, if the community were to accept public funds, then it would be forced to accept the controls that go along with them.

"What affect will this have on our final decision about incorporation?"

He says with the help of friend Phil Crane in the U.S. Congress, he learned that if Sun City West incorporates and accepts state revenue sharing, the community would be governed in accordance with federal and state affirmative action regulations in all aspects of government.

See ANTI, Page 7

Snafu creates confusion; bank upset over meeting

By LAURIE HURD-MOORE
Sun Cities Independent

What was scheduled to take place, almost did not.

The first general meeting of the Sun City West Residents United Against Incorporation group scheduled for 1:30 p.m. June 6 at Western Savings Bank, 19022 R.H. Johnson Blvd., almost did not take place.

Due to the large attendance at the meeting, a number of people could not enter and were left standing outside in the hall.

In addition, bank officials were threatening to cancel the meeting because they were not told beforehand that the meeting was political in nature. According to bank rules, the meeting rooms are not to be used by political organizations.

Both sides, however, say the mixup was nothing more than a simple misunderstanding.

Approximately two dozen people, including two members of the press, were kept out of the meeting for 10 minutes.

Western Savings management was concerned about excessive attendance and the political nature of the meeting. The room holds 70 people.

See MEETING, Page 7



OFF TO A BUMPY START. The first meeting of the Sun City West Residents United Against Incorporation almost didn't happen June 6. Despite an initial conflict with Western Savings Bank over the use of their meeting room, the residents' group continued the meeting and raised over \$1,000. Speaker Philip Vision (pictured) got the ball rolling with a check for \$50.

• MEETING *from page one*

Once management concluded the room was filled to capacity, additional people that arrived were kept waiting in the main bank area.

Informed of the problem, Sun City West resident Philip Vision, a speaker at the meeting, came out of the meeting room to speak to management.

He called the action on behalf of the bank management, "unfair."

After phoning bank officials at another location, those left standing in the hall were allowed to attend the meeting.

"The meeting was a big mistake," says Sandy Rolland, public relations manager for Western Savings Banks.

She says the bank offers free meeting rooms to civic organizations that are non-political and non-profit. Reservations for the rooms must be made by club members.

"I understand the gentleman who signed for the room was not a member of the club. He told us it was a civic organization and did not describe the nature of the group," she says.

"We did not find out that this was an anti-incorporationist meeting until people started showing up (for Tuesday's meeting)," says Ms. Rolland.

The public affairs manager says bank employees have now been instructed to ask for the name and the purpose of any organizations wishing to use the meeting rooms.

Ernie Scribner, a member of the anti-incorporation group's executive committee, contends Western Savings handled the situation poorly.

He says the bank has had political-type meetings in the past and that his group did not expect more than 40 people to show up.

• ANTI

from page one

Mr. Vision says individuals who have chosen to live in a quiet environment for either health reasons or personal choice, should be able to do so without interference from Washington.

"Unfortunately this is not the case now," says Mr. Vision.

SCW

Pro-, anti-incorporationists see differing views of SC

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — Both sides of the issue of incorporating Sun City West look across the Agua Fria riverbed at Sun City but they see different things.

Ernie Edison sees Sun City as a community with six major shopping centers in receivership, a depressed housing market, vacancies in shopping centers and people who have to travel to the county building in downtown Phoenix to find out if they can build a grocery store in their own community.

An incorporated city could take steps to promote itself and work out those kinds of problems, Edison said.

Marvin Goldberg doesn't think those problems would be cured by incorporation.

"The Sun City problems are

not caused by lack of incorporation. They're caused by an aging community which has recreation facilities that are not being used as much and the possible economics of the times," he said.

Anti-incorporationist Moe Becker doesn't believe the argument that Sun City West should incorporate so it won't become like Sun City, because he thinks Sun City is faring well.

"I drove all around Sun City. I didn't see a bad street. The county takes care of it," he said.

Ted Berthold would agree with Becker's view.

"As far as I'm concerned, Sun City itself has been doing extremely well ... they've survived without incorporation," Berthold said.

Sun City West's developer, Del Webb Communities Inc., isn't

scheduled to finish the community and leave until the mid-1990s.

Berthold said incorporation under the right circumstances might not be that bad, but with Webb around for five or seven more years it just doesn't seem like the right thing to do.

Al Spanjer said that through incorporation, Sun City West may be able to avert some of the problems Sun City has — problems which are likely to develop in Sun City West.

"It's going to be a mirror image; maybe not next year, maybe not the year after, but certainly somewhere down the road," Spanjer said.

Jack Henry is for incorporation and said, as a city, Sun City West might be able to use excess state shared revenue funds to start a chamber of commerce.

County's role is debated

Editor's note: Sometime in November, about 11,600 registered voters in Sun City West will get a chance to decide if they want to turn their unincorporated 11-year-old community into a municipality. If a majority of voters favor the incorporation initiative, Sun City West for the first time will have a city government.

The question of incorporation is a controversial issue. To help further the debate, the News-Sun has prepared a series of articles on the issues surrounding incorporation that began Monday and concludes today.

By **CHRISTINE SELIGA**
News-Sun staff

SUN CITY WEST — You've heard it before.

If it ain't broke, don't fix it.

Debate about the adequacy of county services delivered to Sun City West and the responsive-



ness of county government to the community's needs is intrinsic to the arguments for and against incorporation.

Deciding whether to incorporate is deciding between municipal and county government. Can the county be relied upon to take care of a community like Sun City West?

As Ernie Edison said, "After all, we are a city. Why should we have a county government take care of us?"

Harold Nepereny opposes in-

corporation and said he looks at Sun City, Sun City's elder sister to the east, and doesn't see any reason in the last 29 years that would lead him to doubt the county's ability to provide services for Sun City West.

Dick Mastin, vice president of land development with Del Webb Communities Inc., builder of Sun City West, said the county planning and zoning commission turned down an application for senior citizen overlay zoning in a new section of

the community last summer. The zoning allows Sun City West to require that at least one resident of a household be at least 50 years old and prohibits anyone under 18 from being a permanent resident.

The commission action was overridden, however, by the county board of supervisors, which ultimately added the overlay zoning to the new section of the community.

"Typically we come out of the planning commission with a favorable vote. It may not be unanimous, but a favorable vote," Mastin said.

Sun City West resident Loise Copes is a former member and chairman of the planning and zoning commission.

She said this incident shows that not everyone in county government supports maintaining Sun City West's lifestyle.

"On the contrary, . . . the commissioners are from five dif-

ferent districts and they are mostly younger and they believe that senior citizen overlay zoning is discriminatory against younger people and they do not want us to have it," she said.

Getting that zoning passed sometimes depended on which commissioners were there and voting at the meeting.

Copes supports incorporation and is concerned with local zoning issues.

There are about 600 acres of land undeveloped in Sun City West and a great deal of zoning and re-zoning are yet to be done.

In the center of the community is a 55-acre piece of land that is no longer owned by Del Webb Corp. and is zoned for commercial use.

Though Webb will retain architectural control for 20 years after land is sold, it does not control zoning and re-zoning.

Copes said the county would

See Bqth, A4

Both sides argue over county's importance

—From A1

control that and might approve something for that area that local residents would not like.

Harold Nepereny said he doesn't see how a local zoning board would be any more responsive to the needs of residents than the county board is.

He cited the change in zoning which will allow a Smith's grocery store to be built in Sun City as an instance when the county planning and zoning process worked well.

Just because a government is municipal doesn't mean citizens would have more access to it,

Marvin Goldberg said.

He said he is satisfied with the way the county is governing Sun City West.

"Does anyone think we couldn't unite if an important issue came up?" he asked.

Copes disagrees.

She said she doesn't think the

Sun Cities can depend on buses taking people downtown to support a position at a county planning and zoning commission meeting.

Commissioners are appointed, not elected, and aren't necessarily swayed by a big show of

support or opposition to an issue, she said.

The decision Sun City West faces is not just whether to have a local government, Edison said.

"Sun City West will have a government after Del Webb leaves, there is no question

about that," Edison said. "That's not the issue. The question is, which government? There's only two. There's a distant county government and there would be a local city council. Those are the two choices. You can't vote for no government when you vote."

SCW

News-Sun Jr 17/89

Effects of SCW incorporation debated in Sun City

By CHRISTINE SELIGA
News-Sun staff

SUN CITY — This prototype of the active adult retirement lifestyle is one of the largest communities in the far West Valley.

And yet contrary to what its name implies, it is not actually a city.

It is a community of about 46,000 people who are governed by Maricopa County.

A book titled "Jubilee, The 25th Anniversary of Sun City, Arizona," states incorporation was talked about as early as 1961. The community was started by Del Webb in 1960.

The community held a vote on incorporation Dec. 1, 1964. The vote was 2,558 in favor of and 1,036 against incorporation.

Les Merydith, the leader of Citizens for Self-Government, said from reading about what happened at that time that he thinks the people rejected incorporation because Del Webb was still building the community and performed many of the functions of a municipal government so the people saw no need to incorporate.

He said the opposition to incorporation was skillfully led.

"They (incorporation opponents) have played on people's emotions. They have raised fears about things that have happened back east," he said noting that Sun City is unique.

"It's not like the suburbs of Chicago or the boroughs of Philadelphia or New York," he said.

Merydith said under incorporation there wouldn't be a whole lot of city employees be-

cause the city would contract for services such as police protection with other agencies like the county sheriff's department. The community is already built.

Merydith said one of the reasons he supports incorporation is because cities get back part of the taxes paid by state residents in state shared revenue funds.

"I never got over the folly of our subsidizing other cities and towns with our tax dollars," he said.

Just as important as the dollar and cents issue is the fact that a lot of community organizations are working in Sun City with their hands tied behind their backs because no one can speak for the whole community like a mayor could, Merydith said.

The community also does not have a lawyer or lobbyist to defend it.

"We are voiceless and impotent because we have no public funds to take care of things," he said.

Merydith lived in Sun City almost ten years before becoming embroiled in the issue of incorporation.

Nat Jampel became involved in the issue soon after he moved to the community about 15 years ago. He is president of the Sun City Town Meeting Association and is against incorporation.

In speaking out against incorporation, Jampel said, "We pay the lowest taxes that there are."

If the community incorporated

it would not only have to continue to pay county taxes but it would have to pay to support a municipal bureaucracy, Jampel said.

"I want to have nothing with a bureaucracy because no bureaucracy does anything but rob the hell out of you," he said.

"The fact is that Sun City for the past 23 years refused to accept a municipality," Jampel said.

Since incorporation was rejected in 1964 another petition for incorporation was started in April 1985.

Merydith said his group could collect petition signatures for only six months but that the real collection had to be done before June when many people went away for the summer.

The petition needed 3,600 signatures, or ten percent of the registered voters in Sun City, to ask for an election on the issue.

By the end of May 2,600 people had signed.

"So we ran out of time at the end of the summer and we came up short on our petition drive," Merydith said.

He said the activity concerning incorporation in Sun City West has spurred interest in the issue here.

"We are considering going for a petition drive next year and an election in the fall," Merydith said.

Jampel said of the possibility of Sun City West incorporating, "I really don't give a damn but I don't think they will."



NOT REALLY A CITY— Despite its name, Sun City is not actually a city. The only time

the community voted for incorporation, in 1964, the measure was defeated.

News-Sun photo by Stephen Chernelk

PORA: caught in a tough spot

News-Sun June 15/89

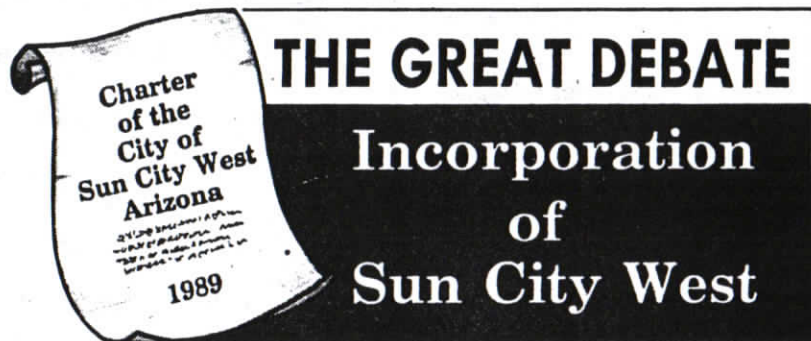
Instigating role hailed, attacked

Editor's note: Sometime in November, about 11,600 registered voters in Sun City West will get a chance to decide if they want to turn their unincorporated 11-year-old community into a municipality. If a majority of voters favor the incorporation initiative, Sun City West for the first time will have a city government.

Incorporation is a controversial issue. To help further the debate, the News-Sun has prepared a series of articles on the issues surrounding incorporation that began Monday and will run through Saturday.

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST. — Some people mistrust the Property Owners and Residents Association (PORA) study of in-



corporation and its role in creating an election in which the issue will be decided at the end of the year.

Ted Berthold is against incorporation, at least partly because he said he is not comfortable with what he sees as pressure from the PORA board members. He said he gets the feeling there is something in it for them.

"Why are they so urgently pressing this matter so early?" Berthold asked.

PORA's bylaws state the organization is involved with exploring different governance options. That is the reason the board and governance committee have done anything on the is-

ssues of Sun City West's future governance, PORA president Al Spanjer said.

"PORA is the only quasi-government that Sun City West has," Spanjer said. "If PORA doesn't do it, who does?"

But some people think individual PORA members' feelings about incorporation may have distorted the board's and governance committee's work.

Phil Vision opposed the incorporation of Sun City West but did not always feel that way.

As a member of the Sun City West Recreation Centers Advisory Board he worked with the governance committee to explore the idea of setting up one joint homeowners' association to gov-

ern the community.

Later he was elected to the PORA board and worked on the governance committee.

Vision said the governance committee made the decision three years ago to go for incorporation.

"The governance committee, the board of directors, absolutely refused to address any of the concerns that were brought up at the workshops," he said. "They either dismissed them or they explained them away."

Harold Nepereny was PORA's deed restriction violation investigator until he resigned last April over a deed restriction matter.

He also was a member of the subcommittee that drew up a model budget for an incorporated Sun City West.

He said he feels members of PORA have advanced their personal beliefs of incorporation through their offices and the resources of PORA.

The PORA governance committee in general was predisposed to recommend incorporation, Nepereny said.

"I perceive the governance committee as having decided,

early on, that incorporation was the way to go and they then spent the majority of the time justifying the position," Nepereny said.

He said the governance subcommittee on finance on which he served was divided on the issue of incorporation.

"I would like to see the anti-incorporationists present facts rather than suppositions," Spanjer said.

Ernie Edison, governance committee chairman and member for the last four years, thinks the people who are against incorporation also started out with a preconceived opinion.

"We started out without a preconceived notion; studied the facts to come up with our opinion," Edison said of PORA's efforts. "They started out with their opinion and they are trying to push the facts around to fit their opinion."

Edison made a five month study himself, released in February 1986, on five options for governing Sun City West.

He said it makes a strong case against incorporation which it would not do if it were biased,

he said.

When he started out with his study, Edison said, he would have voted against incorporation then.

"I started talking to everybody. I talked to Nat Jampel over here," he said referring to See PORA's, A5

PORA's neutrality has not pleased everyone

— From A1

the leader of the Town Meeting Association, a Sun City anti-incorporation group.

Edison said if PORA members were not honest in their intentions they could have used non-issues such as annexation as scare tactics.

"I don't say I skew the facts. If it is damaging to my case I will admit it. . . . if there is any skewing done I believe it is done by the other side because they say so many incorrect things," he said.

Allen Powell has been working with the study since its inception. He said he felt that all the people who have worked on it have been fair in just trying to gather the facts and present them.

The PORA board has never voted on the issue of whether Sun City West should incorporate, choosing to stay neutral. But Edison doesn't think the board should remain so.

"We must come out for incorporation," Edison said. "And there's a reason why. The facts show that it's the right thing to do. . . . we are to promote the health, well-being and welfare of our community. That's what it says in our bylaws. This promotes the health, welfare and well-being of our community.

"Why go to all this effort, and



News-Sun

HAROLD NEPERENY — believes members of PORA have advanced their personal beliefs of incorporation through the resources of PORA.

all this trouble to present, get the facts, make the recommendation, then stop short of saying how we've go to be for it?" Edison said.

Marvin Goldberg said he doesn't think the PORA governance committee and leaders represent the average citizen of Sun City West.

"They claim to be neutral. If ever there was an oxymoron, a contradiction; their neutrality puts new meaning on the word

neutral," Goldberg said.

Goldberg had belonged to PORA but dropped his membership in March.

He questioned how PORA can say it is neutral but present conclusions on the issue. He said PORA should have researched counter arguments and presented those.

He said the volunteer-membership residents association really had no right to claim neutrality especially in the large forums it is sponsoring where it acts as controllers of the microphone.

"They're very bright people," Goldberg said. "They knew the history of incorporation, the fight in Sun City. People are fearful, rightly or wrongly so."

He said PORA should not have called for a petition drive right away after releasing the recommendations of the governance committee — PORA should have started a community dialogue then, Goldberg said.

He doesn't trust the reasons PORA gives for collecting only 10 percent of the electorate's signatures on a petition for incorporation.

"I find that very disingenuous for them to say they were stopping at the 10 percent so the vote can take place because they knew they couldn't get 8,000 signatures," he said.

That figure is two-thirds of the registered voters, the number of signatures needed for an automatic incorporation.

Edison said the governance committee was keeping its word that it would stop gathering petition signatures when there were enough to cause a vote.

"I don't think we could have gotten two-thirds easily," he said. "But we never said we were going to."

PORA should not have started with a petition drive and should have just stuck to giving out the governance committee report, Nepereny said.

"I think PORA should have stopped . . . I think other people should have gone on with the petition process," Nepereny said.

Nepereny said that by sponsoring the petition, PORA in effect has advanced the incorporation process.

At the public meetings PORA has held on the issue, most of the people speaking on topics at the meeting have presented issues in a manner that has been very supportive of incorporation, Nepereny said.

Jim Walker and Calvin Brice are among the panelists brought by PORA to the meetings.

Walker, former city manager of Peoria, and Brice, town attorney for Youngtown, also were hired for a total of about \$3,000

to help PORA draw up the petition asking for incorporation.

"These two people are retained by PORA to help them advance incorporation in Sun City West, my opinion," Nepereny said.

"We wanted their advice because we needed to be sure what we said was correct," Edison said.

Edison said it was made clear to Brice and Walker that there were no job commitments to be made.

Edison defended the PORA-sponsored meetings.

"What we've tried to do is give an opportunity for those against it to make a fair presentation and be heard . . ." Edison said. "We also, however, have an obligation to continue to present the facts, and the facts simply appear to be and are in favor of local city government. I can't help that."

In general, Spanjer would like to see more community in-

volvement on the issue of what Sun City West will do when Webb finishes building and leaves.

Of the anti-incorporationists he's asked to help in that effort, he said he hasn't received one positive response.

"They're against incorporation but they don't want to do anything, any work to benefit the community," he said.

Goldberg, who is active with the Sun City West Posse, was asked to serve on the PORA committee which nominates people to run for the PORA board.

At a meeting of his group a month ago he said he declined the offer. But he said he would not be adverse to rapprochement with PORA.

Friday: How realistic is a proposed municipal budget that says Sun City West wouldn't have to create any new taxes?

Ex-PORA presidents recognize a need

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — Property Owners and Residents Association (PORA) President Al Spanjer favors incorporation.

As someone who represents Sun City West outside of the community, he said he has seen the way representatives and leaders from incorporated communities are treated.

He said they get recognition and attention from government officials and legislators they try to influence just because they are elected officials from a city or town.

He said he thinks past PORA presidents would favor incorporation because they have been in a position to see and hear about the problems and potential problems in the community.

Of the nine past PORA presidents, seven — Gene Wilson, Joe Kelso, William Mason, Loise Copes, William Thomas, Aubrey Johnson and Sandy Goldstein — support incorporation.

"Basically the reason to incorporate Sun City West is to keep it from being like Sun City," said Wilson, who was president in 1979.

Wilson lived in Sun City from 1973 until 1978, when he moved to Sun City West. He saw higher density housing put into Sun City than had originally been planned and the erosion of property values.

"So I've seen the decline of Sun City, and we don't want that to happen to Sun City West," he said.

He, too, was frustrated when trying to represent the commu-



LOISE COPES — says Sun City West has to determine its own destiny.

nity outside of the community.

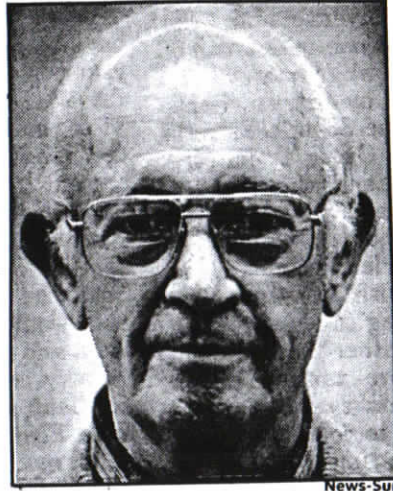
"Nobody would recognize us because we were not a political entity," Wilson said.

Joe Kelso said he didn't run into any trouble with PORA representatives being accepted by the county or anyone else when he was president. But that was at a time when about 80 percent of the community belonged to the organization. That was in 1980.

"Oh, from what I know of it, I support it," Kelso said of incorporation.

He said it seems unlikely that any group of people as large as Sun City West's population can protect itself in today's political climate without having a recognized representation that has some clout.

Now Sun City West relies on people at the county level to govern them but those people don't live in the community, said



BENJAMIN DAVIS — does not wish to reveal his opinion on the incorporation issue.

Mason, PORA president in 1981.

He supports incorporation because the community needs to be able to set its own zoning and respond to the development which is and will be taking place around Sun City West.

Police protection is not a major issue now, but it may be as more people move into the area, Mason said.

"We need to have better police protection," he said.

While PORA does not enjoy the full membership of all residents of Sun City West, it has tried to represent all the people of Sun City West, he said.

"If we incorporate, everybody in Sun City West is part of that picture," Mason said.

Loise Copes supports incorporation "very, very much."

"I think we have to determine our own destiny," the 1982 PORA president said.

In her work as planning and



JOE KELSO — Sun City West's needs recognized representation with clout.

zoning commissioner for Maricopa County, she said she found most of the Valley does not understand the problems and needs of Sun City West.

She said the county's residents who live in incorporated communities have clout through the Maricopa Association of Governments.

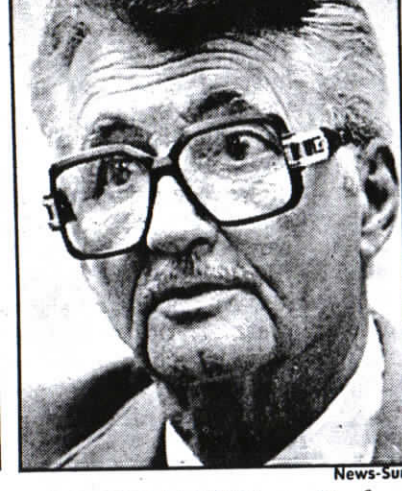
"They are a very strong lobby and they get what they want," Copes said.

The PORA president of 1984, William Thomas, said he favors incorporation.

"I think it offers the community the greatest protection for its self-interests."

Local zoning would enable the community to control what type of structures are built in the community, he said.

"My basic philosophy is if a community or group is unwilling to govern themselves, they deserve whatever someone else



BOB WILLIAMS — Prefers to stay neutral while serving as a state representative.

may choose to give them," Thomas said.

In the future, Aubrey Johnson doesn't see Sun City West as a peaceful little subdivision in the middle of the desert but as a community surrounded by 100,000 people.

Johnson, 1986 PORA president supports incorporation because the community needs to be able to regulate itself.

"The way we can get power to control the environment we live in is through incorporation," he said.

Johnson agreed with Spanjer's assessment of why a PORA president might favor incorporation.

"I think most past presidents would say they viewed so many of the problems where they had no authority to act," Johnson said. "Even if it was beneficial to most of the community, they were powerless to do something

about it."

Sandy Goldstein, PORA board member and last year's president, said he supports incorporation.

"There's a need for continuity and leadership," he said. A city manager could provide that continuity.

He said people representing Sun City West are not taken as seriously as those representing incorporated communities.

An example of this occurred at a state Senate hearing on the so-called Sun City school tax.

"There was a much different welcoming of the mayor of Youngtown because he was an elected official," he said.

Goldstein said when PORA representatives went to give their presentation on the issue, the panel didn't even know what PORA was.

Not all PORA presidents have made their stands on incorporation public.

Benjamin Davis, PORA president in 1987, said he has made up his mind on the issue but does not think it is proper to declare it.

"I don't think it's appropriate for anyone who's past president to tell the people what they want to do," he said.

Bob Williams was elected as District 15 state representative last November. He was PORA president in 1983 and 1985.

Williams said he has his own personal views about incorporation and people are free to come to him and ask him about the issue. But he would not say whether he supports it.

"I've got to stay neutral as long as I'm a state rep," he said.

Differing factions debate incorporation

News-Sun staff

SUN CITY WEST — The formation of two new groups, one for and one against, shows the beginning of the community's polarization over incorporation.

Marvin Goldberg is the coordinator and spokesman for the group Sun City West Residents United Against Incorporation.

Formerly known as the Sun City West Executive Committee Against Incorporation composed of 13 core members, the group has a list of 80 people who are interested in the organization, Goldberg said.

He describes the group as non-partisan, non-political and having only one goal: to keep Sun City West unincorporated.

"We hope to have a party and disband the day after the election," he said.

On the other side is Jack Henry, chairman of Westers for Self-Government.

Henry was the president of a manufacturing company in Wisconsin before retiring.

Henry said he would not disclose the group's plans in detail or the number of members. He did say that 12 to 15 people on a main committee have been working on plans to promote incorporation.

Westers For Self-Government has been meeting since the beginning of the year.

Henry said the organization operates independently of the Property Owners and Residents Association (PORA), which sponsored the petition drive on the incorporation election but has remained neutral on the issue.

"We're not associated with PORA in any way," he said.

There is no chairman of Goldberg's group; it works on consensus, he said.

Goldberg was an elementary school principal in Brooklyn and moved to Sun City West in the fall of 1986.

Before that he lived in Hicksville, N.Y. in an unincorporated part of Nassau County.

He said the anti-incorporation group is not made of naysayers and is not against change but would like to see a complete study done on the issue.

The group is working on holding a meeting about its views of incorporation.

For more information on Westers For Self-Government call 584-5454.

For more information on Sun City West Residents United Against Incorporation call 584-7576.



GETTING TOGETHER — Members of Sun City West Residents United Against Incorporation has 13 core members and a list of 80 people opposing the incorporation of Sun City West.

News-Sun

Federal housing laws cloud issue

Adult-only status may be disputed

Editor's note: Sometime in November, about 11,600 registered voters in Sun City West will get a chance to decide if they want to turn their unincorporated 11-year-old community into a municipality. If a majority of voters favor the incorporation initiative, Sun City West for the first time will have a city government.

The question of incorporation is a controversial issue. To help further the debate, the News-Sun has prepared a series of articles on the issues surrounding incorporation that began Monday and will run through Saturday.



By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — Supporters of incorporation say questions about local affects of the Fair Housing Amendments Act of 1988 have been used as scare tactics to frighten people into opposing incorporation.

One of the changes in the fair housing act made it illegal to discriminate in housing on the basis of family composition or whether the family had children or not.

That concerns Sun City West resident Phil Vision.

"First of all with the change in federal law, I see incorporation as a threat to the existence of our most discriminatory, resort, retirement-community lifestyle that we've been enjoying here," he said.

Vision said that if the community incorporates it would have to set up its own senior citizen overlay zoning prohibiting children younger than age 18 from living here.

The city might be taken to court by someone challenging the zoning on the basis of the fair housing law, he said. It

might have to spend millions of dollars to prove it meets exemptions for the elderly in the law.

"We would be broke before we ever became incorporated," Vision said.

Now the Sun Cities and Youngtown are covered by the county's senior citizen overlay zoning ordinance.

The ordinance states that in an area covered by the zoning, at least one occupant of a housing unit has to be 50 years of age or older and no one under the age of 18 is allowed to be a permanent resident.

Without a municipal government the county would be taken to court if someone wants to challenge the zoning on the basis of the changed fair housing act, Vision said. The county has the resources and the money to handle a court case better than a fledgling municipality.

But not all people who think Sun City West should not incorporate believe that is a legitimate concern.

"I don't see that as having an

impact one way or another," Harold Nepereny said.

PORA president Al Spanjer said the community meets the exemptions for housing for the elderly in the law so the housing law has no bearing on incorporation.

"The fair housing law is a complete non-issue," he said.

Del Webb Communities, Inc. estimates that 94 percent of the residents of Sun City West are age 55 or older. At least 80 percent have to be age 55 or older to qualify for exemption from the fair housing law.

The proof that Sun City West meets exemptions for the elderly will probably rest with Sun City West whether it is incorporated or not, Spanjer said.

He said the community will have to keep records proving they fall within the guidelines of the exemptions. The vehicle to do that is probably the Sun City West Recreation Centers, Inc. because everyone in the community is required to be a member.

In fact the recreation centers are starting a new computer program which will go into affect July 1 and be able to store
See Keeping, A4

Keeping the SCW lifestyle

— From A1

the age of every recreation center card holder.

The card holders will have to divulge their age when they renew their cards. If they don't, they won't get their cards.

Spanjer said he didn't agree with Vision's premise that the county would defend the senior citizen overlay ordinance.

He said proof of that is in the

torney's office drew up to examine changing the ordinance to conform with the change in the federal housing law. Only two of the options would allow Sun City West to remain as it is.

Vision doesn't see it that way.

"I think it would be rather difficult for a county government to completely desert these communities," he said.

He said he didn't think the

that to happen.

Thursday: Officials of the Property Owners and Residents Association (PORA) of Sun City West defend themselves against charges that the group's study on incorporation was biased. Also, former PORA presidents present their views on the issue and two groups, one for and one against in-

Incorporation vote likely for November



SIGN ME UP — A crowd of people earlier this year sign petitions to call an election on incorporating Sun City West. Petitioners collected more than twice the number of signatures they needed.

By **CHRISTINE SELIGA**
News-Sun staff

SUN CITY WEST — Whether they like incorporation or not, about 11,600 local registered voters probably will have an opportunity to vote on the issue this fall.

The Property Owners and Residents Association (PORA) has collected 2,233 signatures on a petition asking for an election on incorporation.

PORA is the only voluntary-membership homeowners association in Sun City West.

PORA's petition drive lasted from mid-February until March 23 and gathered twice the number of signatures needed to call an election.

In late summer, the petition probably will be filed with the clerk of the county board of supervisors and a vote scheduled for November.

One of PORA's activities outlined its bylaws is the "study of various forms of government that might be applicable to Sun City West."

PORA conducted the petition drive after the PORA governance committee spent about four

years studying the future governance of Sun City West. The five options the committee drew up:

- Do nothing and remain under county jurisdiction.
- Be annexed by an adjacent community.
- Establish one or more special governmental districts such as the fire district to take care of government services.
- Merge PORA and the recreation centers to form a single homeowners association.
- Incorporate.

Annexation was found to be unlikely to occur because the only entity that could annex Sun City West is the town of Surprise. If it annexed Sun City West it would find itself with a new population whose registered voters vastly outnumber its own, the governance committee discovered.

The committee's study of special districts showed they did not provide a practical means of governing because under Arizona law special districts can't be used to provide services which are available to unincorporated areas from the

county.

Combining PORA and the recreation centers would have been impossible, the study found. There is no procedure for merging a voluntary membership association such as PORA with a mandatory membership association such as the recreation centers.

In the end, the governance committee considered doing nothing and incorporating as feasible options.

The governance committee concluded that to do nothing and remain under county control would be possible only if developer Del Webb Communities Inc. remained forever and there were no changes in Maricopa County's government.

But the committee's report concluded change was inevitable and that Webb would only be around as long as it took to complete the community's development. Webb executives have projected the company will complete the community in the mid-1990s.

The committee chose to recommend that the PORA board present its final report to the

membership and ask the members to vote on starting petition drive so an election could be held on incorporation.

At its November 1988 membership meeting, about 400 people voted to expend \$8,000 to have a petition written up and to conduct a petition drive.

However, the governance committee did not advocate just incorporation.

After incorporation, it said, the community should:

- Be governed under a charter voted on by the residents that would limit the government's power.

- Provide only those services that the county or Del Webb Communities Inc. now provides. Those would include police protection and street maintenance from the county and special events conducted by Webb.

Residents would continue to pay for the private services they are receiving now such as garbage collection.

- Contract for those services with agencies qualified to provide them and therefore keep the number of municipal employees at a minimum.

Sun City West — Arizona's 84th city?

Officials explain incorporation procedures

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — There are 83 cities and towns in Arizona.

This fall, Sun City West might become the 84th.

The subject of incorporation often ignites heated debates.

Cathy Connolly at the Arizona League of Cities and Towns said that is because it is a change.

"It's a change in the status of the community and I think change causes controversy . . .," Connolly said.

In Arizona, 76 percent of the population lives in cities and towns. Ninety-one percent of Maricopa County residents live in incorporated communities.

A community must have at least 1,500 people to incorporate.

Communities with populations between 1,500 and 3,000 are called towns when they incorporate. If the population is over 3,000 then the community is called a city.

A community may incorporate in one of two ways.

If two-thirds of the community's registered voters sign a petition asking the county board of supervisors to incorporate, the board can declare the community automatically incorporated.

If the petitioning gathers signatures from 10 percent of the registered voters, an election can be called on the issue.

Petitions are circulated for 180 days. Then they are filed and the board of supervisors has 60 days in which to call an election. The election must be held within 120 days of filing the petition.

A majority of the voters at the election must favor incorporation for the board of supervisors to declare the community incorporated.

If a majority votes against incorporation, no further action is taken and the community remains under the jurisdiction of the county.

If a community rejects incorporation through a vote, another election on the issue cannot be held for one year.

If a community is located in an urban area, sometimes the approval of neighboring towns

and cities must be obtained and handed in along with the petition.

In the case of Sun City West, Property Owners and Residents Association (PORA) President Al Spanjer said the PORA governance committee collected letters of approval from four of the five municipalities within a six-mile radius of the community. El Mirage, Surprise, Youngtown and Peoria have given their consent and the committee is waiting for a letter of approval it expects from Glendale.

When the board of supervisors issues the order for incorporation, it also will appoint a seven-person interim city council. Within 20 days of that appointment, the council has to gather and decide which council member will be mayor.

State law doesn't have any rules regarding how the board chooses the interim council members.

County Supervisor Carole Carpenter, D-Dist. 4, said that when Litchfield Park incorporated in 1987, so many people inquired about the council positions that she asked interested people to submit their resumes or summaries of their background.

"It was a way we chose to try and objectify that process," she

said.

Carpenter, whose district includes Sun City West, said a similar method probably would be used if that community were to incorporate.

The interim council members are recommended by the supervisor whose district the community is in and the whole board of supervisors must approve the recommendations.

In Litchfield Park, several of the seven council members

chosen did not have anything to do with incorporating or the group of people who supported incorporation.

The interim board only serves for a limited time, she said. The first election of city council is in May following the incorporation.

The county services will end on July 1 following the incorporation of a community.

In Sun City West this would mean police protection through the county sheriff's department

and street maintenance would stop and have to be provided by the city. Nonetheless, municipalities sometimes contract with the county to continue providing those services.

Once a community becomes incorporated, it is entitled to state shared revenue funds on a per capita basis.

Compared to other states, Arizona has a fairly broad-based revenue sharing program, Connolly said.

There are five sources of funds.

- Urban Revenue Sharing — Fifteen percent of the state income tax net proceeds are returned to this fund. The money in turn is distributed each month to incorporated communities on a per capita basis.

- State sales tax — This money also is distributed each month to incorporated communities based on their population.

- Highway User Revenue Fund — These funds are made up of gasoline and diesel fuel taxes and other transportation fees. Half of the money goes to incorporated communities based

on their population. The other half is distributed based on gasoline sales in the county where the municipality is located.

- Vehicle license tax — Money for this comes from tax payments for the registration of

motor vehicles. The tax is collected by the county and returned to municipalities in that county on a per capita basis.

- Local Transportation Assistance Fund — The state lottery provides the revenue for this fund. Cities and towns are entitled to a share of this fund based on their population in relation to the total population of cities and towns applying for the funds.

Municipalities do have to file an annual application with the Arizona Department of Transportation for these funds. They must be used for transportation.

Towns and cities may start some local form of taxation. Property taxes, sales taxes, business and occupational license taxes, utility franchise taxes, building permits and inspection fees, fines and forfeitures, and municipal utility operations are the most common forms of local revenue.

"All of the cities and towns in the state have some form of local taxation," Connolly said.

Sales taxes may be created through a city ordinance and the community does not have to vote to start the tax. A property tax must have voter approval.

One out of 12 cities that incorporated from 1975 to 1985 initiated a property tax. Eleven of the cities have a sales tax.

Incorporation issues take shape

Will voters make Sun City West a city?

Editor's note: Sometime in November, about 11,600 registered voters in Sun City West will get a chance to decide if they want to turn their unincorporated 11-year-old community into a municipality. If a majority of voters favor the incorporation initiative, Sun City West for the first time will have a city government.

Incorporation is a controversial issue. To help further the debate, the News-Sun has prepared a series of articles on the issues surrounding incorporation that will run through Saturday. By **CHRISTINE SELIGA**
News-Sun staff

SUN CITY WEST — Not too long ago, people talking about incorporationists and anti-incorporationists were probably talking about Sun City, where the debate on municipal self-government has flared for years.

But now, in Sun City West,



people are taking stands and debating — or sometimes arguing — the pros and cons.

"If we want to maintain the Sun City West lifestyle, our best opportunity to do that is through incorporation," supporter Al Spanjer said.

Opponent Marvin Goldberg said, "I'm worried that incorporation changes the whole flavor of the community. It's now a political municipality."

One reason Spanjer said he supports incorporation is that it might help the image of Sun City West throughout the Valley.

"I think people elsewhere in the Valley think that we're takers, that we're fat cats..." he said. "I think we could help change the image if we take control of our own destiny."

Two basic services an in-

corporated Sun City West would have to provide are law enforcement and street maintenance.

By contracting for police protection with the sheriff's department, protection for the community could be increased, which is important as the areas around Sun City West grow, Spanjer said.

"We are going to be impacted by forces outside the community," he said.

Moe Becker is against incorporation partly because he thinks there is nothing wrong with the way the county provides police protection and street maintenance.

A proposed budget drawn up by the Property Owners and Residents Association (PORA) shows Sun City West as a municipality needing only state

shared revenue funds to run a local government. And those funds would still provide Sun City West with an annual \$1 million surplus.

A lot could be done with that surplus, but the idea of taking revenue sharing money and having a huge surplus does not appeal to Goldberg.

"I don't even know if it's really ethical to think that way," he said of the emphasis on money.

Harold Nepereny doesn't care if there is a \$1 million or \$20 million surplus.

"No one has convinced me of the need for local government," he said.

Nepereny said he is not opposed to incorporation but he doesn't think it's necessary now for Sun City West.

Other people opposed to incorporation question whether the community can survive on those state shared revenues alone. They refer to the fact that no other community in Arizona does that.

"The anti-incorporationists point their fingers at Sedona, at Litchfield Park, at other communities in Arizona, which is like comparing bananas and oranges," Spanjer said.

But Becker said with Ari-

zona's financial woes, the Legislature might dip into the shared revenue funds to get the budget in the black.

"The Legislature sure as the devil can cut the percentage of revenue sharing," he said.

Legislation can change state shared revenues, Cathy Connally of the Arizona League of Cities and Towns said.

With money problems the Legislature has had this year, it has probably looked at state shared revenues as a way to get some extra money.

"Really, for the first time, there is indeed discussion about it," she said.

If state shared revenues were stopped, Spanjer said the county would not get its share.

John Nelson, assistant finance director for Maricopa County, said the county probably will receive more than \$143 million in state shared revenue for the 1988-89 fiscal year, which ends June 30.

If the county didn't get that money because revenue sharing was abolished, Spanjer said the lost money probably would be made up through taxes.

Incorporation would start another layer of government and another group of people who will effectively increase taxes on Sun

City West's residents, opponent Ted Berthold said.

Phil Vision, like Berthold, said he anticipates more taxes will be levied if the community incorporates.

If there is a sales tax, then it will be passed on to people living in Sun City West who are living on fixed incomes and are less able to afford it, Vision said.

See Charter, A4

Inside

Ann Landers	C4
Bridge	D6
Business	D1-D4
Classified	C6-C8
Community	A3-5
Crossword/comics	D6
Emphasis	C14
Obituaries	B4
Opinions	A6-7
Lottery	A2
Sports	B1-3
Stocks	D5
Television	C5
Weather	A8
Who's meeting	C3
Forecast — Tonight: Clear, Low in the middle 70s. Light and variable wind. Tuesday: Sunny and warmer. High around 106.	

SCW

Charter would limit city's powers to tax

— From A1

But Spanjer said that most Sun City West residents do a good deal of their shopping outside of Sun City West in communities that have sales taxes. Therefore, other cities are benefiting from taxes which Sun City West residents already pay.

Ernie Edison, another supporter, said, "I think it would be a terrible mistake if we did not vote for it because it's an opportunity for us to continue what we have and keep our lifestyle protected."

Incorporation would mean a government closer to the people it's governing as well as elected officials who are from the community, Edison said.

"They will pay attention to our problems. They will speak for us. They will stand up for us. They will represent us," he said.

But Edison said he wouldn't support incorporation if it didn't have the charter concept behind it.

PORA is proposing that an incorporated Sun City West create a charter to restrict the power of the municipality to levy taxes.

Nepereny said he doesn't understand why the issue of charter government has even been brought up because charters can only be drawn up after a community incorporates and no one can predict whether the communities

will elect to have a charter.

Some people probably have been confused by the subject and will go to the polls thinking they are voting for a charter government when they are not, he said.

Edison said it is important to incorporate now while Del Webb Communities Inc. is still developing the community.

Goldberg doesn't believe the argument that people need time to get a municipal government in place before Webb leaves in the mid-1990s.

Vision said his experience during the past year and a half with PORA's leadership and as a

PORA board member makes him think the leaders of Sun City West would bring about the poorest kind of self-government possible.

"If this is the calibre of leadership we can look forward to, woe to Sun City West," Vision said.

Vision cited a PORA committee's proposal to build a post office in Sun City West through funds raised by the community as an example of PORA's misuse of power.

The PORA membership did vote to set up the committee and then later voted down the proposal.

Nepereny thinks there are a lot of qualified people to run the city but questions whether they would come forward to do so.

"We already have problems getting people to run for the recreation center and PORA," he said.

Because local government officials are usually voted into office for terms of several years, people have to wait for an election to remove an official or try to recall the official, which is difficult.

"You may not have the impact on local government that you

might expect when you look at it on face value," Nepereny said.

He said he prefers county government and building a strong PORA that could represent all the people in the community and enforce its deed restrictions.

A lot of these arguments for and against incorporation actually mask the real issue, Spanjer said.

He sees control as the real

issue of incorporation.

"Do we want self-government or do we want county government?" Spanjer said. "That's the main issue."

Tuesday: Officials of two recently incorporated Arizona municipalities discuss their experiences. Also, anti-incorporationists in those new municipalities talk about what life in their communities is now like.

PORA Starts Petition Drive

by Jim Bailey
Staff Writer

THE WESTER

Feb. 23-Mar. 1, 1989

The kickoff for the Property Owners and Resident Association of Sun City West petition drive to hold an election to determine whether SCW should incorporate or not began Thursday, February 16 with a media conference in the Community Services building.

Al Spanjer, PORA president, opened the media conference stating that this was the culmination of the 3-year study of the options for Sun City West.

The group now has 180 days in which to gather enough signatures to require holding an election to decide the issue. Ten percent of the registered voters in SCW or 1,800 are needed to sign the petitions to allow the election.

PORA representatives said they would collect only 2,000 signatures to make sure they have enough valid signatures.

The next step, after petitioning is completed, is for the petitions to be filed with the clerk of the county board with a 60-day grace period allowed to establish an election date.

Morey Jensen, PORA vice president, said that the petitions had been reviewed and approved by the Maricopa County Director of Elections, Mike Hardy. It was reported that Hardy has said that the SCW petitions were the best prepared he had ever received.

The petitions themselves read, in part, as follows: "To the Honorable Board of Supervisors of the County of Maricopa, Arizona:

We, the qualified electors residing in Sun City West, a community containing more than fifteen-hundred inhabitants, hereby petition and pray that the Maricopa County Board of Supervisors call with 60-day of the filing hereof an election of the qualified electors pursuant to Section 9-101, Arizona Revised Statutes, as amended, for the purposes set forth in said statute.

Said election is to take place on a date designated by the Board, but in no event more than 120-days of this Petition, and if a majority of qualified electors voting thereon vote for incorporation, to declare the community incorporated as a city under the name of Sun City West, Arizona."

The petition includes a legal description of the community and the statement "If incorporated, the City shall be entitled to proceed under Section 9-281, if qualified, to submit a charter proposal to its electorate."

According to Jensen, a group of 60 people are trained on February 21 to obtain the signatures necessary to have an election in November, set for November 14 at present.

Larry McIntyre, as chairman of the Governance Committee of PORA, gave a summary of the options for SCW from a study began in 1986.

He stated that the final conclusion of the study indicated that the best option was the charter form incorporation.

McIntyre also had given an estimate of what the cost of the study would have been if each person involved had given 10 hours at \$50 an hour with the total cost of the study being \$75,000 to \$100,000 since there had been approximately 150 people involved.

It was announced that complete files of the study since 1985 are available in the library and at the PORA office for anyone to review.

There will be a recap of the 3-year study delivered to every household in SCW so that all residents will have the opportunity to study this option.

Walter Schifter, chairman of the petition signers, pointed out that everyone should exercise his right to vote by seeing to it that the opportunity will be available in November to vote, whether in favor or opposed to incorporation.

Jensen told the Wester of a quote he had read from an anonymous source that said, "any country that refuses to govern itself deserves whatever may happen to it." He stated that this applies to the present petition drive and is an opportunity for SCW electorate to determine the future of Sun City West.

Jensen gave the Wester several reasons why the community should control its destiny, and would control its own use of any funds derived from the state required if it becomes incorporated.

He said that an incorporated Sun City West would receive 1) 15% of the net proceeds of state income tax, 2) 25% of 2% of the state sales tax, 3) 30% of net sales collection from the highway users fund or \$208 per resident from all shared revenues, 4) 25% of net income from vehicle license taxes and shared revenues, from the local transportation assistance or lottery funds.

At the conclusion of the media conference, several statements were made by past presidents of PORA stating that they were in favor of incorporation as a provision for zoning and the opportunity for self government.

SCW

No change

Leader speculates incorporation would not affect Centers

By LAURIE-HURD MOORE
Sun Cities Independent

If Sun City West were to incorporate, the impact on the Recreation Centers would be "zero," according to the corporation's general manager.

Bill Woodyard, general manager of the Recreation Centers of Sun City West, Inc., told members last week that the corporation would not change the way it operates if the community were to incorporate.

"Simply stated, the impact of incorporation on the Recreation Centers will be zero," says Mr. Woodyard.

"The Recreation Centers is a privately held homeowners association and it will continue to be regardless of whether it is located in an unincorporated area of Maricopa County or in an incorporated community."

Mr. Woodyard discussed the issue during a recent Rec

Centers open forum, held March 28, in Sun City West.

The general manager acknowledged that when it comes to incorporation and the Rec Centers, there are a great many "misunderstandings and concerns."

"As a homeowners association, the (Rec Centers) will continue to finance and manage the operation of the facilities ... and define who may be a member and who may use the facilities," he says.

During the forum, Mr. Woodyard also addressed the present financial situation of the corporation.

He says that during the present fiscal year, beginning July 1 and ending June 30, the Rec Centers anticipate \$5.198 million in revenues and \$5.392 million in expenses.

A deficiency of \$194,000, he says, is a result of the con-

struction of the Fred Kuentz Recreation Center. The center was completed February, 1989.

"In accordance with the Master Agreement, which exists between the Del Webb Corp. and the Recreation Centers of Sun City West, Inc., Webb agrees to subsidize the operation of the Rec Centers to the extent that expenses exceed revenues," says Mr. Woodyard.

"Webb does this because in developing a community, facilities are built in advance of need.

"Since Webb builds facilities in advance of need, they are prepared to support the operation of the Recreation Centers until such time that the population catches up with the facilities," he adds.

Although a loss is expected this year, Mr. Woodyard says the corporation's financial condition is strong and should

See CENTERS, page 3

From page one

remain strong even after Webb turns the facilities over to the residents.

He says there is \$937,365 in the Rec Centers asset replacement fund as of February, 1989. The funds will be used to pay for expensive capital improvements once Webb leaves Sun City West.

Presently, eight dollars of the \$96 annual assessment fee goes to support the asset replacement fund.

The Webb Corp. also adds to the fund by contributing \$2 per person per year until the fund reaches a balance of \$1.25 million.

"Interest on the investment accrued at the rate of 6.5 percent per year and re-invested in the fund," says Mr. Woodyard.

"Actually, the community is not growing quite as fast as noted, but on the other hand, the rate of return has been considerably greater than 6.5 percent. So at year's end, in all probability, the fund balance will exceed \$1.147 million," he says.

The asset replacement fund is expected to reach \$1.9 million by 1992.

Mr. Woodyard urged residents to begin thinking now about how they can meet the financial needs of the Rec Centers once Webb leaves the community.

"I have heard it stated by residents that when they assume full responsibility for managing and financing the affairs of the Recreation Centers, the annual assessment should be reduced and that the Centers live on the reserve fund for a number of years," he says.

"I would caution against such action and recommend that not be done," he adds.

"It is essential that a sound plan for the financial management of the Recreation Centers ... be established so as to ensure the long term financial viability of the Centers," says Mr. Woodyard.

County to set SCW incorporation vote

By JENNIFER ARP
Daily News-Sun staff

SUN CITY WEST — A call for Sun City West's incorporation election is on the agenda for the Maricopa County Supervisors' Tuesday meeting.

The supervisors have been asked to schedule the election for Tuesday, Nov. 14.

Petitioners earlier this year collected more than 2,000 signatures on petitions calling for

the election.

The Maricopa County Elections Office has declared the petitions valid, said Bill Thompson, acting elections director.

Thompson said a sample signature check determined that 95 percent of the 2,529 signatures the elections office received in July were valid.

"That projects to 2,402 good signatures" and a "very high" validity rate," attributable to a

high percentage of registered voters among residents of the Sun Cities, Thompson said.

The Property Owners and Residents Association (PORA) of Sun City West sponsored the petition drive, but the homeowners association itself has remained neutral on the issue of incorporation.

PORA sponsored the drive following about three years of work studying several options of gov-

ernment for Sun City West.

The estimated cost to Maricopa County of an incorporation election in Sun City West is \$10,000. The amount is considerably lower than the national average for all types of elections.

Thompson and Maricopa County Supervisor Carole Carpenter, a Democrat whose District 4 includes Sun City West, said the board is bound by law to call the election when a peti-

tion drive proves successful.

"The likely outcome is that the board will set the election day of Nov. 14, 1989, on the issue of incorporating Sun City West," said Carpenter, who has remained neutral on the matter.

Should resident voters authorize incorporation at the ballot box, Sun City West would become the 15th-largest municipality in Arizona.

A voter-approved municipal

government in Sun City West would be prevented by charter from levying tax increases beyond those collected by the state.

Among the specific restrictions incorporation proponents intend to include in a municipal charter are: Voter approval of any proposed sales or property tax; voter approval of salaries for elected representatives or budget increases; and voter approval of bonded indebtedness.

SCW

Official explains tax assessments

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — Local residents have been receiving notices from the Maricopa County assessor's office on their 1989 assessments and some say they are shocked at increases in assessments.

That's why the Property Owners and Residents Association had two officials of the county assessor's office give a presentation Thursday morning on how property value assessments are determined.

"We've had numerous calls," said PORA president Al Spanjer on why the presentation was given. In one call a man said his assessment went up 18 percent, Spanjer said.

Joe Propati, residential division manager, and Jim Robson, an area supervisor for the residential division who covers Sun City West, talked about how the assessor's office comes up with assessments.

"Much of what we do is mandatory, controlled and overseen by the Arizona Department of Revenue," Propati said.

Arizona statutes require that all property be valued annually at market value, which is a composite value of land and buildings on a property.

When the assessor's office determined value of a property, it considered sales activity recorded in 1986, 1987 and half of 1988.

The sales information it uses

is not from real estate listings but from affidavits from the county recorder's office, which records property and home transactions.

Appraisers also try to evaluate the transaction, Propati said. For example, if it is between relatives sometimes the prices may be too low.

"We just shoot for the average arms-length transaction in that community," he said.

The assessor has 40 appraisers who must keep track of about 600,000 residential property parcels, so mass appraisals are done.

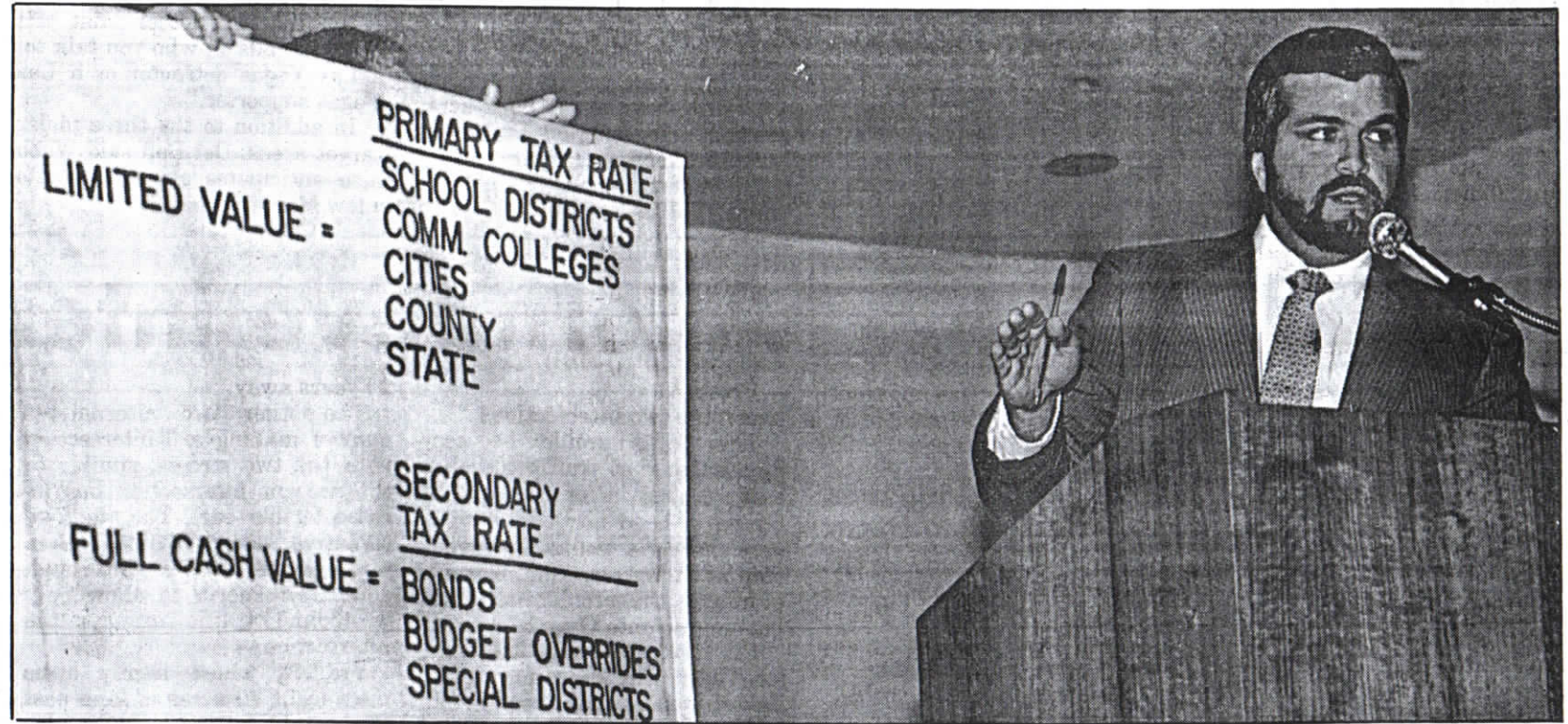
When appraisers are doing an appraisal they take into consideration the year the home was built, the square footage and the type roof it has. They don't consider things like landscaping or minor improvements on a home.

"That is why historically their prices are usually lower than the real market value of the home," Propati said.

On the notices people have received from the assessor's office, there are two kinds of assessment figures — limited value and full cash value.

The limited value figure is the basis for computing primary taxes, which include taxes for the maintenance and operation of school districts, community college districts, cities, counties and the state.

The full cash value figure is the basis for computing secondary taxes such as budget over-



News-Sun photo by Christine Seliga

COUNTY ASSESSOR TALKS TO PORA — Joe Propati, of the county assessor's office, met with about 300 people at a Property Owners and Residents Association membership meeting. His chart indicates that the limited value assess-

rides, bond issues and special district taxes.

Actual tax rates are set by the Legislature, Propati said.

The full cash value is the market price assessed by the assessor's office. Propati said this figure goes up or down as the market dictates.

The limited value is deter-

ment is used to determine primary taxes people owe while a property's full cash value determines secondary taxes. Most people have received 1989 assessment notices which were mailed out at the beginning of the year, said Propati.

exceed the full cash value but they can be the same," he said. but a new law changed it to a month this year, Propati said.

Propati said people who want to appeal their assessments can do so. They must fill out an appeal form, which asks for specific evidence and facts, before the end of January.

In past years the appeal period has been about two months

The county assessor's office has set up a temporary office at 13001 W. Bell Road to help people with their assessment questions. The permanent area office is at Beardsley Road and the Black Canyon Highway.

mined one of two ways. It can be the previous year's limited value increased by 10 percent or it is 25 percent of the difference between the full cash value and last year's limited value. Propati said the law says the county must pick the higher number for the limited value.

"The limited value can never

SCW talk stirs up AARP meeting

By CHRISTINE SELIGA
New Sun staff

SUN CITY WEST — Incorporation raised some tensions at Tuesday morning's local chapter meeting of the American Association of Retired Persons. Before speaker Dick Gray had a chance to start his presentation, an unidentified man in the audience said that Gray was from the Property Owners and Residents Association and is in favor of incorporation.

About 240 people attended the meeting of Chapter No. 3514 in the R.H. Johnson Recreation Center Social Hall and heard Gray's presentation on the financial figures for an incorporated Sun City West.

PORA's governance committee has studied different aspects of community government over the past three years. Gray was chairman of a subcommittee studying the financial aspects of incorporation.

It was during program chairman Henry Keyes' introduction of Gray that the man in the audience accused Gray of being in favor of incorporation. The man and a woman in the audience asked for someone to present a view against incorporation.

Keyes had to bang his gavel to restore order.

PORA officials in the past have said the group has not endorsed incorporating Sun City West. The group is conducting a petition drive for an election so the community can vote on the subject. No organized opposition to the petition drive or incorporation has formed.

Likewise, Keyes told the audience that the AARP chapter does not want to tell its members how to vote on incorporation if the community should vote on the subject.

"We want you to know that Chapter 3514 does not, and I

reiterate, does not take a stand on incorporation," he said.

Keyes said after the meeting that he would try to get someone to talk to the group who would have a rebuttal to the PORA financial study but it would have to be someone using facts and not emotional arguments.

Gray started his presentation explaining the subcommittee's research.

"This research team wanted to develop the hard facts, the hard financial facts," Gray said.

The subcommittee started its research last March and finished during mid-summer. Along the way they were confused by conflicting opinions on incorporation that they heard or saw in the Sun Cities, but they were dedicated to providing facts people could use to make a decision on incorporation, Gray said.

He said the committee members included a lawyer, three people who spent their lives working in small city governments and a number of people who had been involved in financial matters and budget control during their business careers.

They developed a model budget for an incorporated Sun City West with 14,800 full-time residents. The budget showed a surplus of more than \$1 million.

"In the model I will share with you we don't find a need for any additional taxes," Gray said.

Most of the income for an incorporated Sun City West would come from state shared revenue funds and some would come from building permits and franchise taxes utility companies would pay to the city. Building permits and franchise taxes are now paid to the county.

The state shared funds are moneys collected from taxes and redistributed to all cities and towns in Arizona according to population size as required by Arizona statutes.

Gray said the model budget was assembled under several assumptions. One was the city would contract out for most of its services, such as with the county sheriff's department for police protection. Using contracts would mean the city would have fewer employees on its payroll.

Another assumption is the municipal government will have a charter.

"A charter government gives you an opportunity to place great restraints on what the city council can do," Gray said.

Ed Corkins listened to Gray Tuesday. Corkins said he's seen

Gray talk before and thinks he does a good job.

"What I'm afraid of is when it comes to voting time these people are not going to know the facts," he said. "There are a thousand people out there watering their lawns or going to the bowling alley who don't know what is going on," he said.

Althea Curfman said, "I thought he was very enlightening. I thought he was helpful for people who are on the fence and don't know which way to go."

She said the presentation at

the meeting was a great way to reach a lot of people but the group should not take a position on incorporation.

At AARP Chapter 3514's board meeting last week, the board passed a motion to endorse PORA's efforts in the petition drive.

But chapter President Mike McGlade said Tuesday the vote was not valid because board members who were not yet installed voted on the issue. The members were installed at Tuesday's meeting and the motion will come before the board again next month.

Inc. OK

Neighbors approving SCW move

News-Sun staff

SUN CITY WEST — The El Mirage City Council and Surprise Town Council Thursday unanimously approved resolutions allowing Sun City West to incorporate.

This means four out of the five towns needed to approve incorporation have given Sun City West the OK to incorporate if that is what the community decides to do. Youngtown and Glendale also have indicated approval.

The only approval Sun City West needs now is from Peoria.

Al Spanjer, president of the Property Owners and Residents Association (PORA), said this morning that PORA has been expecting the approvals.

"We're not surprised at all," Spanjer said.

PORA is the organization that will sponsor a petition drive in the spring to hold an election on the issue at the end of the year.

The PORA governance committee has been trying to get approvals from the towns and cities because a community must have the approval of all municipalities within six miles of it before it can incorporate.

Spanjer said he has a letter of approval from Youngtown wishing them luck.

He and PORA first vice president Sandy Goldstein have met with Glendale Mayor George Renner. Renner told them the town's policy is to OK an incorporation but it does not send an approval letter until a petition drive starts because the city doesn't want to appear as if it is endorsing the incorporation.

Spanjer said PORA has sent Peoria a letter of its intent and is waiting to set up a meeting with Peoria Mayor Ron Travers.

Surprise Town Attorney Bob McCoy said Thursday night that passing the resolution means Surprise has no intent to annex any property known as Sun City West.

It also means the town of Surprise believes Sun City West residents have the right to decide if they want to incorporate, he said.

But the resolution does not mean Surprise is in favor of incorporation, McCoy said.

McCoy said if a town opposes incorporation, Sun City West can take the issue to court, and the opposing town would have to show a reasonable dispute or plans to use the area as part of the town. Otherwise towns are obligated to go along with incorporation, McCoy said.

The El Mirage council passed its resolution without comment. The council in December had approved an incorporation resolution but an error in the language of the document required approval Thursday night of a corrected resolution.

SCW voter turnout

Only 1,188 cast ballots

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — Despite the high voter turnout in Sun City West for November's state and national elections, fewer residents than usual voted in two community elections Tuesday.

In all, 1,188 ballots were cast in the Sun City West Recreation Center Advisory Board election, although 17,450 people were eligible to cast ballots.

The recreation advisory board candidate with the highest number of votes received 902 votes. In past years, the candidates with the highest number of votes have received more than 1,000.

In the Property Owners and Residents Association board election only 950 members, or 11 percent of the membership, voted. Last year 1,590 members, or 15 percent of the membership, voted.

Both elections were Tuesday from 9 a.m. to 6 p.m. in the R.H. Johnson Recreation Center social hall.

"There wasn't anything really highly controversial on the rec board at election time this year," advisory board President Jack O'Connor said this morning.

With no big issue for candidates to highlight, they conducted low-key campaigns and voter interest was low, he said.

O'Connor said that last year, more than 2,400 votes were cast in the election.

Daily News-Sun,

Thursday, Dec. 8, 1988

More residents turned out for a special membership meeting in October to change the recreation center association bylaws than voted in Tuesday's election.

A preliminary tabulation of a mail-in vote on whether to keep Del Webb Communities as the recreation centers manager indicates about 90 percent of the ballots will be returned, O'Connor said. Results of the Webb vote probably will be released Friday.

The mail-in ballots for the Webb vote were sent out in November and had to be returned or postmarked no later than midnight, Dec. 6.

Three years ago when O'Connor was elected to the board, there was a mail-in ballot for the advisory board election and a large number of people voted. But mail-in ballots are expensive, O'Connor said.

Thomas Cunningham, the candidate with the highest number of votes in the advisory board election, said he thought some people couldn't vote because they had already left on holiday trips.

There also were several busloads of residents who went on a special holiday trip to Laughlin, Nev., on election day. Cunningham said they may not have known they could get an absentee ballot, or that the last day to get the absentee ballots was Friday before the election.

Sandy Goldstein, PORA president, said Wednesday that the lack of a controversial issue also may have affected voter turnout for the PORA board election.

Incorporation drive initiated by PORA

By CHRISTINE SELIGA
News-Sun staff

SUN CITY WEST — The Property Owners and Residents Association voted this morning to sponsor a petition that could lead to Sun City West's incorporation by the end of 1989.

With a chorus of "ayes" and a handful of shouted "nays," about 450 members decided to sponsor the first step in the process of determining whether the community should incorporate with a charter government.

The incorporation petition would tentatively be circulated from February 1989 to July 1989 with community discussion and information meetings starting now and lasting through the petition period.

"This is not a meeting or a vote on whether Sun City West should incorporate or not. The PORA board has not taken a stand," PORA President Sandy Goldstein said before the vote.

He said it was a meeting to hear the PORA governance

committee's recommendations and to decide whether PORA should "initiate and conduct a petition drive which will allow the community to decide whether or not to incorporate."

Sun City West, like Sun City, is now unincorporated and falls under the jurisdiction of Maricopa County. A vote to incorporate Sun City failed in 1964.

Should the Sun City West petition drive gather signatures of 10 percent of the electorate, the county will call an election on incorporation. If the petition drive gathers signatures from more than two-thirds of the community, then the county will automatically declare Sun City West incorporated.

The report recommending incorporation with a charter government was the result of more than three years of work by the PORA governance committee.

The committee's final report recommendations:

See PORA, A4

PORA launches incorporation drive

From A1

That the PORA board vote to have the report presented to the membership.

That the membership be asked to vote to initiate a petition for incorporation and to have an election on the issue.

The report also states that an incorporated Sun City West should be defined in the petition as subject to the following conditions:

- An incorporated Sun City West would be governed under a charter adopted by vote of the residents.

- City services would be provided by entering into contracts with private companies or other agencies qualified to provide them. Sun City West would be a "contract city."

- Only those services now provided by Maricopa County and Del Webb Communities Inc. would become municipally supported services. Residents would

continue to pay for private services they now pay to receive.

Ernie Edison, board member and governance committee member, said that the committee does not approve and would not recommend a regular incorporation but it recommends incorporation with a charter government, which contracts out for its services such as fire and police protection.

"If there's a way to keep this community as it is ... that we feel is the way to do it. We see very little problem with it but we see an awful lot of possibilities," Edison said.

He said a charter can prevent the city government from raising property and sales taxes and government salaries without a voter referendum. Phoenix, Scottsdale, Casa Grande, Prescott, Peoria, Tucson and Avondale are some of the 16 cities in Arizona that have charter governments.

Edison said the incorporation vote would have to take place and then 25 percent of the residents would petition for a charter. Fourteen residents would then be elected to draw up the charter.

The governance committee recommended having community information meetings and discussion from now until July 1989 during the incorporation process. It also recommended circulating the incorporation petition from February 1989 to July 1989 and a vote on incorporation scheduled for December 1989.

Al Spanjer, PORA board member and committee member, told the membership this morning about the governance committee's recommended timetable.

He said once a community incorporates, the county must continue to provide services to the area until the next July 1. That means it would be good to have

an incorporation election about six or seven months prior to July 1 to get the community in order while the county still governs it.

The Property Owners and Residents Association (PORA) board voted unanimously Wednesday afternoon to bring the governance committee's findings to the membership today to see if the members would sponsor a petition drive.

City question

Group wants incorporation study in SCW

By MARY DUMOND
News-Sun staff

SUN CITY WEST — Serious study of Sun City West incorporation within the next 18 months was proposed and passed Tuesday at the meeting of Chapter 3514 of the American Association of Retired Persons.

The motion came from Margaret Harmsen, after she had presented information and arguments to consider incorporation by October, 1988.

Harmsen is past AARP legislative chairman and now is a member of the advisory board of the Recreation Centers of Sun City West, as well as secretary of the Sun City West Foundation.

After firmly rejecting an amendment by Phil Vision to relax the wording of the incorporation issue and hold the subject for study groups for later action, Harmsen turned the motion intact over to Henry Keyes, president.

Vision had offered a delaying amendment, saying, "We really don't need to incorporate because (Del E.) Webb (Communities Inc.) is still here."

"We do need to consider this now," Harmsen said. "Webb would much rather deal with an unincorporated area — it's easier to handle. I will not change the motion," she told Vision.

"I haven't talked to everyone in Sun City West, but I've talked to as many people as I could," Harmsen said. "And the people I have contacted in Sun City West seem to be neither for nor against incorporation," she said.

Harmsen went over an eight-point outline, copies of which she distributed to the audience, that listed what she considered advantages of incorporation:

- No power of taxation without vote of the people.
- Volunteer mayor and council.
- Establishment of a low-cost taxi service (such as \$1 a ride anywhere within city limits) to augment Sun Cities Area Transit Inc. (SCAT).
- Preserve the Sun City Sheriff's Posse by contracting with the sheriff for security services.
- Preserve the Prides.
- Use existing facilities for headquarters of local government.
- Hire a city manager or city clerk.
- Maintain the Recreation Centers Association of Sun City West as a non-profit private corporation which would not be affected by incorporation.

"Why not wait until Devco leaves?" she asked. "Well, the longer we wait, the less chance we have of incorporating. The laws

See Sun City West, A4

NEWS-SUN WEDNESDAY, APRIL 29, 1987

-From A1
state that a community cannot incorporate if another incorporated community of 5,000 or more people is within 6 miles of it.

"I called El Mirage and asked about its population, I was told it's around 6,000," she said. "I called Surprise and it is well over 6,000 and it's growing fast. If things continue as they are, we will have to ask permission to incorporate from El Mirage, Surprise, Youngtown, Peoria, Glendale and — from the way it's annexing — even Phoenix."

Harmsen said Sun City West, if incorporated, would have received \$2,826,300 in state shared revenue.

"I recommend a study of taxes and opinions, with a look to incorporating in October 1988," Harmsen said.

Vernon Cauley, AARP treasurer, objected to introduction of the entire subject, saying that it had not been approved at the AARP board meeting.

"I asked for new business and this comes under the heading of new business," Keyes said, who asked for other audience com-

ments, asked for a second to the motion, received it, then put the motion to a vote.

A substantial majority of AARP members voted to sustain the motion.

"We are simply an informational body and are not taking a stand," Keyes said later. "We will study all sides of this question."

Keyes said the AARP chapter was under no obligation to commit its membership to just one course of action.

"Our board of directors believes we should take a look at every plan that's available," Keyes said.

"When someone else brings in another idea," he said, "we will study that. We are neither for nor against incorporation or anything else at this time."

Guest speaker was Jerry Svendsen, editor and publisher of the Sun City Life magazine.

Svendsen pointed out Sun City's trend-setting stature in the 1960s and said that now that times have changed, he is a member of the Sun City Ambassadors.

He described the group as "a chambering organization that looks at Sun City South — south of

Grand Avenue — and its declining values.

"We are saying that if we're not careful, this decline can spread to Sun City central, then north of Bell, and so on."

The earliest-built section of Sun City, now the southernmost portion, sees its churches losing members and its homes losing resale value, Svendsen said.

The age group buying homes in this area, he said, "consists of people with more modest incomes, usually in their 70s. . . ."

"We in the Ambassadors hope to turn this around," he said.

He said the group is made up of representatives of trust companies, banks, real estate people and other business interests, all of whom work closely with the Northwest Valley Chamber of Commerce.

Loise Copes of Sun City West, member of the Maricopa Planning and Zoning Commission, presented Maricopa County Land Use Plans showing location of the Northwest Loop of the freeway system.

"We have proposed very little development north of Sun City West, because of a dearth of water," she said. Land south of

Grand Avenue already is being eyed for development and is beyond Sun City West's influence, since Surprise has annexed the area.

Copes repeated her proposals for a desert walk along Trilby Wash next to Sun City West, on county-owned land, and horse and bike trails along the Central Arizona Project canal, on federal land.

Copes again asked Westers to attend the 7 p.m. May 21 meeting of the county planning and zoning commission.

"PORA (Property Owners and Residents Association) is providing the buses," she said. "Meet at 5:30 p.m. that day in the Crestview parking lot."

Copes said residents must make their opinions heard in public while the plan is still in the flexible stage.

"We should attend heavily at the next county supervisors' meeting, too," she said to AARP members, "sometime after July 1."

Copes has advocated packing meetings to protest developers' plans to build projects with more than 2.8 residences an acre, which is Sun City West's average zoning.

SCW should consider the question of incorporation in reasonable way

The Sun City West Chapter of the American Association of Retired Persons (AARP) will be organizing study workshops to explore the concept of municipal government. This action is not intended to advocate nor oppose incorporation for Sun City West.

A positive element can develop from a movement to study incorporation in Sun City West found in the questions that will be raised by the community during the process.

The issues that affect and shape public policy are the foundation for municipal functions and demand full public consideration and participation. A strong interest and participation among the citizens of Sun City West could ensure a successful incorporation effort and a productive government in a newly incorporated community if that is their choice.

A local government could bring control closer to the people involved. Some people, because of past experiences fear the introduction of "politics." Yet, consider the recent efforts of concerned Sun City West residents to prevent the development of Sun Valley Park by Coronet. This would result in

LOCAL ISSUE

the streets of Sun City West.

Without our own local government we must rely upon Maricopa County "politicians" to deny Coronet's petition for rezoning.

In Sun City, where the word "incorporation" stirs emotions and arouses hostility among friends and neighbors, 1,500 multi-story high density dwelling units have been built in the last three years. This construction would not have been approved if zoning decisions were made by a Sun City zoning board accountable to the residents of Sun City instead of by the politicians of Maricopa County.

Self-government in effect would de-centralize big government and return control to the taxpayers, where it belongs.

To do nothing might leave Sun City West open to the threat of increased taxation if we were to remain unincorporated under Maricopa County rule and "County Home Rule" goes through.

It would give the county authority it presently does not have to levy special tax assessments on

taxes and receive more than usual services from the county. It is almost a certainty that Sun City West (and Sun City, too) will be among the first and most seriously affected victims of this proposed new county taxing authority.

AARP, in organizing study workshops to explore the concept of municipal government should acquire a thorough working knowledge of municipal operations before any discussion of cost figures for local government in our community can be finalized.

Then they should refer to Arizona Revised Statutes (ARS), 43-244 for revenue sharing of state income tax; 42-1341, cities and towns entitlement of state sales tax collections; 25-1598, highway user revenues collected by the state; 28-1591, money collected by the county as tax payments for the registration of motor vehicles and shared by Arizona towns and cities, as well as 40-1102, shared revenue generated by the state lottery.

These revenues are distributed to incorporated cities and towns in relation to the total incorporated population of the County.

In other words, Sun City West

porated area to avoid paying "city taxes" are presently paying such taxes in support of cities other than their own. These are collected by and for the state, but none of those tax dollars are to benefit Sun City West as long as we are unincorporated.

We should not be frightened by the word "incorporation." The Recreation Centers of Sun City West is "incorporated." As a member of the advisory board, elected by the voters of Sun City West, I can attest to the fiscal responsibility and accountability of its management. Why would a municipal government elected by the same residents, in the same "political" environment be any different?

We expect that there will be very vocal and perhaps emotional arguments surrounding incorporation, but it should be emphasized that this is a healthy and natural characteristic of our system.

We hope that in the process everyone will freely express opinions clearly and concisely, and will provide more light than heat. Mostly, it is hoped that we will remain friends when we have exerted our energies and it is all over.

Philip H. Vision

Incorporation issue merits serious study

I am dismayed that the president of the Town Meeting Association of Sun City, Nat Jampel, finds it necessary to quote out of context from the Arizona League of Cities and Towns booklet, "Municipal Incorporation in Arizons."

In my opinion, he has distorted the author's intent to suit his own purposes. What he so adeptly omitted was:

"The issues that affect and shape public policy are the foundation for municipal functions and demand public consideration and participation," and, "A strong interest and participation among citizens will ensure a successful incorporation effort and a productive government in a newly incorporated community."

Space does not permit a rebuttal to all of his "comments." The keystone to successful self-government is truth, honor and trust. Any discussion must be based on these principles and all questions should be given full and honest consideration prior to making a decision with respect to incorporation.

In the interest of space, I will address only Jampel's assumption that we are safe in our unincorporated community "under the legal

LOCAL ISSUE

umbrella of our government, Maricopa County" and "That legal protection would not be available if Sun City were incorporated."

There is a very real threat of increased taxation if we remain under county government and "County Home Rule" goes through.

It would give counties authority to levy special tax assessments on communities who county authorities allege receive more than usual services from the county.

Only recently there have been allegations by Supervisor Campbell that Sun City and Sun City West receive more services from the county than they pay for in taxes. It is almost a certainty that Sun City and Sun City West will be among the first, and most seriously affected, victims of this proposed new county taxing authority, once "Home Rule" is passed.

We are represented on the Maricopa County Board of Supervisors by someone who is not a resident of the Sun Cities. Carole Carpenter is an advocate of "County Home Rule" and expanded county authority and power. Additionally,

only two Maricopa County Planning and Zoning Commissioners (out of nine) are residents of the Sun Cities.

While Sun Citians were fighting among themselves about self-government, 1,500 multi-story high-density dwelling units have been built in Sun City in the last three years. This construction probably would not have been approved if zoning decisions had not been made in downtown Phoenix, but instead in Sun City by a zoning board accountable to the residents of Sun City.

I disagree with Jampel, whose comment to the statement that "usually once government is established it grows instead of shrinking" was, "There is little need to comment on this obvious fact!"

Perhaps more truthful and serious discussion of self-government may result in decentralization of growing county government, bringing control closer to the people involved.

Although I neither advocate nor oppose incorporation for Sun City West, there does seem to be a positive element that can develop from a movement to openly study incorporation found in the questions raised by the community during this process.

Because these are important questions, and the answers can be valuable to a community regardless of its final decision about incorporation, Sun City West will initiate workshop study groups in the fall.

At these workshop study sessions, it is my hope that everyone will freely express opinions clearly and concisely and will provide more light than heat.

And, most importantly, that we will remain friends when we have exerted our energies and it is all over.

Philip H. Vision
Sun City West

Westers move to head off problems after DEVCO

By MARY DUMOND
News-Sun staff

SUN CITY WEST — Light, not heat.

That's the goal of Sun City Westers who want their peers to look at all the options open to them when the Del E. Webb Communities Inc. finishes building the retirement community.

And when the construction crews leave, about 1991, so presumably will the company's benevolence.

But members of the Property Owners and Residents Association (PORA) and the advisory board of the Recreation Centers of Sun City West Inc. already are getting together to consider options for the future of the community. They hope to arrive at a consensus in a series of workshops.

Ben Davis, PORA president, believes that the workshop method will shed more light and less heat on what could be a controversial subject.

"We hope to avoid the friction

we see in Sun City," Davis said Monday.

Among those on the steering committee is Allen Powell, who got the discussion going Aug. 11 with an update of a report on choices of government Westers may chose. Copies of these were distributed to committee members at their Aug. 18 session.

Among the decisions made at the Aug. 18 meeting:

- The workshop format is the best means of getting information about management alternatives to Sun City Westers.

- Representatives at the meeting said they needed to review discussions with members of their own groups to determine support for taking part and getting volunteers to attend PORA workshops and get active in them.

- Representatives agreed that most Sun City West residents need more information about options for community management and that information discussion should be a major workshop goal.

- Several shorter workshop meetings will be more effective than a single, larger meeting.

- The activities should be conducted, as the U.S. Supreme Court dictated about desegregation years ago, "with deliberate speed," so that the form of government is the one picked by the majority of Westers.

Here's how the workshop works:

A staff and committee doing the presentation will gather at the meeting hall 30 minutes before the program begins.

The staff will count Westers taking part in the workshop as they enter the hall and provide each of them with a printed agenda.

They will introduce themselves and the purpose of their meeting, including what they hope the participants' responsibility will be.

They will outline the procedures the audience will follow and the goals and objectives of the committee.

Then the group will give an oral presentation, possibly augmented by slides.

The audience will be divided into groups of no more than 12, with each group choosing a recorder to take down all ideas, and go into a brainstorming session on concerns of the community and the audience.

The study groups will put priorities on their concerns, the recorders will present the results to the staff or committee members, who will have been circulating to remind people that no questions are to be discussed at this time.

Staff members will be representatives of PORA and the recreation centers advisory board and those they have been authorized to choose to expand the working committee to no more than nine members.

Westers will then have their hands full of pencils and their heads full of facts before the active work year is over.

They have nine major areas to work on at nine separate workshops.

These are health, welfare and

education; public transportation and environmental problems; liaison with other governments and organizations providing utilities and related needs, and communications, member relations and management-resident relations.

Others are planning, zoning, deed restrictions and architectural control; fiscal operations; operation and maintenance of equipment and community facilities; public safety; operations and maintenance administration and personnel administration.

A panel of experts will describe management options available on all nine topics.

By this time, the audience will take a break.

Then will come audience reactions, including questions, suggestions of more management methods and suggestions of management functions to add or eliminate.

Then comes organization of more workshops.

Leaders will be designated, as

will recorder-reporters; outcomes will be restated, along with conclusions, recommendations, questions to be studied and action priorities.

Then will come workshop reports, a wrap-up, a status report and a plan for further action.

Other questions the committee deals with are timing and schedule, how long meetings should be, how many meetings are needed, the final targets and dates for completed action.

And the biggest question of all on continuing this activity: Who will be responsible?

Members of the steering committee establishing all this protocol are Jerry Altman, Kenneth Becker, Alice Bolster and Ernie Edison.

Also, Sandy Goldstein, Henry Healy, Jim Jackson, Earl Knisley, Barbara Knudsen, Mike Mahoney, Elaine McCraith, Larry McIntyre and Powell.

Still other members are Toni Sengbush, Al Spanjer, Orvall Stamm, Paul Thompson, Phil Vision and Owen Wirak.

Residents of Sun City West prepare for 'self-rule'

By David Rossmiller
The Phoenix Gazette

SUN CITY WEST — The connection between this retirement community and Del E. Webb Communities, Inc., is like a parent-child relationship, but in this case it will be the parent who leaves home.

After Webb, the community's developer, has sold its 13,000th home, probably in 1992, the corporation will turn Sun City West over to its residents.

This prospect has residents apprehensive. Discussion of the Webb pullout is never far from the surface during Sun City West meetings and activities.

In eight years Webb has sold more than 7,000 houses in Sun City West in eight years. "As build-out becomes closer buying tends to speed up, and when all the homes are sold will determine when we get out of this community," said Ken Plonski, Webb spokesman.

"We are taking a neutral position on how the residents run the community after we leave, but we do plan to do everything we can to make sure they're prepared to take over," Plonski said.

"We will not pull out and leave the residents of Sun City West drifting."

Ben Davis, president of the Property Owners and Residents Association, which represents about half the community's population, said preparing now for the pullout is essential to avoid endless bickering later.

Waiting until after Webb leaves to debate the proper way to run the community would lead to the community being divided.

PORA commissioned a study of options last year and in November got the word there were two choices: incorporate or merge PORA and the presently powerless Recreation Board to form one political body.

Davis said he has no preference between the two choices, but said incorporation would be hard to bring about "because of what residents have heard from Sun City."

He was referring to the variety of groups vociferously opposed to Sun City incorporation.

"I'm neutral on incorporation. Over there (Sun City) they as a result of incorporation have very hard lines drawn. I attribute part of that to a lack of planning before Devco (another name for Del E. Webb) pulled out," Davis said.

"After watching what has taken place in Sun City, no one wants that to happen here."

Plonski said Webb will turn over more and more responsibility to the community, starting with giving members of the Recreation Board

some real power.

Currently Recreation Center decisions are made by Webb officials.

"By the time we leave the residents will be in complete control. It will amount to on-the-job training, and we will probably watch a couple of years to make sure the set-up is working fine," Plonski said.

Even after Webb leaves, the company will be able to help preserve the community's way of life, Plonski said.

An often-expressed fear has been that other developers will move into Sun City West and construct high-density housing for non-retired people.

The perception of such a threat has packed more than one meeting hall over the past several years.

"The fact is Webb has a 20-year

veto over developments that are incompatible with our zoning here," Plonski said. "We would be able to prevent this from happening, which we would do, because as a company that sells to the retired market we have an interest in preserving this way of life."

Perhaps a greater threat, one that has received little public attention, is posed by the possibility of courts overturning the principle of age-restrictive zoning, Plonski said.

No one knows how a judge would decide the issue, because no real test cases have arisen, Plonski said.

Calvin Brice, attorney for the retirement town of Youngtown, said it is possible courts would rule age-dependent zoning to be discrimination, but said so far no interest group has taken an interest in destroying retirement zoning.

Plonski said banning of age-restrictive zoning "would be a real disaster for Arizona. It seems to good to be true that some group like the ACLU (American Civil Liberties Union) hasn't tried to get it thrown out."

"If they did you'd see a tremendous economic impact on this Valley and the whole state," Plonski said.

But even without court challenges, the future of retirement communities will be far different from their past, Plonski said.

for 'self-rule'

The example of Sun City West, which was envisioned as a community of 75,000 sprawling on both sides of Grand Avenue, has sealed that future, he said.

Plonski said Webb does not consider its efforts to build such a community a failure or mistake, even though present plans are to

limit population to 25,000 residents.

Rather, he said, the market has changed from the early 1960s, when Sun City was built.

"The future of this industry will be tied to smaller communities closer to metro areas" of about 1,000 acres and 5,000 people, he said.

However, the smaller size of new communities doesn't indicate there is a lack of interest in them. Plonski said market studies show that 20 years ago only 3 percent of the elderly would consider pulling up stakes and moving to a retirement community.

Today, with a much larger elderly population, both in numbers and percentage, that figure is close to 10 percent, he said.

"Arizona will continue to be a retirement mecca," Plonski said.

SUN CITY WEST
LONG RANGE PLAN
for 1990 and 1995

Prepared by
Allen S. Powell, Chairman
Planning Committee
Property Owners and Residents Association

August 1985

T A B L E O F C O N T E N T S

I	Demography and Land Use	Page	1
II	Economic Base		3
III	Adjacent Community Developments		4
IV	Circulation of Traffic and Transportation		7
V	Drainage		8
VI	Utility Services		9
VII	Other Community Services		12
VIII	Community Planning Issues		17
IX	Concluding Remarks		21

SUN CITY WEST LONG RANGE PLAN
for 1990 and 1995

I. DEMOGRAPHY AND LAND USE

The assumptions which follow are considered reasonable based on available data.

A. Population

The population trend for Sun City West can be established from actual counts for May 1 (U.S. Census date) of 1978, 1980, 1983, 1984, and 1985. Census figures have been used for 1980 and Recreation Centers' cardholder numbers for the other years. These figures show a gradual slowing of the growth of Sun City West. The population trend line shown in Figure 1 has a slope of 1,730 persons per year population growth. Conforming to the Sun City West Master Plan Update of November, 1984, the Del E. Webb Development Company will complete its construction program in 1993 or 1994. Population figures shown for 1995 are greater than the Master Plan limit of 26,000 persons because it has been assumed that some continued growth of Sun City West Phase I will occur. The residential development of large tracts of commercially-zoned land will accommodate this added population. Elimination of Sun City West Phase II has been announced.

The population cohorts in the following table have been adjusted from the 1980 census age distribution to reflect the aging of residents present in 1978 through 1983. It has also been assumed that early retirement and pre-retirement moves to Sun City West will continue to make the 45 to 64 year age cohort the largest fraction of our population.

AGE	1980	1985 Est.	1990 Est.	1995 Est.
0 - 9	12	31	50	72
10 - 17	11	36	57	83
18 - 21	15	47	76	111
22 - 29	39	114	172	250
30 - 44	54	164	267	389
45 - 64	2,162	6,333	10,008	14,541
65 - 74	1,234	3,951	6,249	9,079
75 - 84	201	1,161	1,837	2,668
84 plus	<u>44</u>	<u>242</u>	<u>384</u>	<u>557</u>
TOTAL	3,772	12,081	19,100	27,750
Female	2,001	6,403	10,123	14,708
Male	1,771	5,678	8,977	13,042

B. Residences

At present, there are, on average, about 1.9 persons per residence in Sun City West. Del E. Webb Development Company's Master Plan Update calls for remaining units in the community to have a housing mix of 10% apartments, 16% duplexes, and 74% single family homes. The present housing mix built or being constructed is 62% single family, 16% duplex, and 22% apartment homes. These percentages lead to this supply of residences:

HOUSING TYPE	1980	1985	1990	1995
Apartments	295	1,405	1,792	2,241
Duplexes	200	1,022	1,640	2,322
Single Family	<u>1,490</u>	<u>3,960</u>	<u>6,821</u>	<u>10,042</u>
	1,985	6,387	10,253	14,605

The apartment total includes Casitas, Vacation Specials, Garden Apartments, and Multi-story Apartments.

C. Commercial Establishments

Growth of commercial areas of Sun City West has been erratic and has been concentrated in the commercial core along Johnson Boulevard, Camino del Sol, and Meeker Boulevard - except for a neighborhood shopping area at 128th Avenue and Beardsley Road which is currently being built. Present and projected commercial uses are shown in the following table:

	1980	1985	1990	1995
Retail Trade	9	30	42	54
Service	10	49	58	67
Banks	2	7	8	9
Savings and Loans	2	7	8	10
Medical and Dental	0	7	12	18
Professional	<u>1</u>	<u>4</u>	<u>8</u>	<u>16</u>
Total	24	104	136	174

These numbers are based on the completion of two small retail centers - at Spanish Garden-Camino del Sol and Beardsley-128th, completion of the Sun City West Professional Building, and increased occupancy of existing buildings for 1990. The 1995 figures assume one neighborhood shopping center will be built outside the existing central core area.

Features of the commercial growth of Sun City West are small retail and service establishments in small centers with building of major shopping centers planned outside the community along the major through roads, Grand Avenue and Bell Road. In some categories, such as Medical and Dental and Professional, Sun City West will continue to be underserved for many years.

II. ECONOMIC BASE

A. Projected Income

Annual income in 1981 for Sun City West households was found by the University of Arizona Long Term Care Survey to be:

Below \$8,000	6% of households
\$8,000 to \$25,000	36.4% of households
Above \$25,000	57.6% of households

Indicated median income was about \$25,000 per household. Assuming 3% inflation in income of residents, median income for 1985, 1990, and 1995 would be \$28,140, \$32,620, and \$37,800 respectively.

Community after-tax income, using 30% of gross income for Federal, State, and local taxes, becomes:

1985	1990	1995
\$179,730,000	\$334,450,000	\$552,070,000

B. Business Impacts

Taking 46% of after-tax income for housing, 18% for transportation, 11% for retail purchases, 18% for services, and 7% for insurance, investments and savings these impacts on local businesses are projected in current dollars.

Expense Category	Factor	1985	1990	1995
Housing	.46	\$82,675,800	\$153,847,000	\$253,052,200
Transportation	.18	32,351,400	60,201,000	99,372,600
Services	.18	32,351,400	60,201,000	99,372,600
Retail Trade	.11	19,770,300	36,789,500	60,727,700
Financial	.07	12,581,100	23,451,500	38,644,900

C. Employment

The Long Term Care Survey reported that 13.67% of Sun City West households gave employment as their primary source of income. Taking one employed person per household as relying on employment income, the following numbers of employed will live in Sun City West:

<u>1985</u>	<u>1990</u>	<u>1995</u>
870	1,400	2,000

III. ADJACENT COMMUNITY DEVELOPMENTS

Housing and commercial developments in Surprise and El Mirage, the communities adjacent to Sun City West, both compete with and support development in our community. Housing developments reduce home sales but bring in potential customers for local establishments. Commercial developments broaden our range of services and trade and stimulate competitive marketing. These plans are to be completed during the next five years:

RESIDENTIAL

El Mirage - No part of the City of El Mirage now abuts Sun City West and recent annexation of land by Surprise now prevents growth by the City in our direction. A number of residential developments have been announced which will impact Sun City West commercial establishments to some extent. They are:

Grandway Village at 127th and El Mirage, 35 acres, 247 mobile home sites with pools, spa, clubhouse, and recreational facilities.

Pueblo El Mirage RV Resort and Country Club at El Mirage Road south of Cactus Avenue, 2,400 R.V. pads with an 18-hole golf course, pools and spas, clubhouse, tennis courts, and other recreational facilities.

El Mirage Estates at El Mirage and Thunderbird, 1,500 high density housing units, probably manufactured homes.

H and M Development scattered sites for 200 units in the city.

Surprise - The town of Surprise now extends along the entire southern boundary of Sun City West from 115th Avenue on the east to the Beardsley Canal on the west. Developments completed, in progress, and announced to start soon are obvious to us and will strongly impact our community. These are:

Brookview Country Club Resort at Bell Road and 115th Avenue, an adult resort community to have 1,000 to 1,150 homes with an 18-hole golf course, 5 park areas, clubhouse, and other recreation facilities on 370 acres.

The Rose Garden at Bell Road and 115th Avenue across from Brookview, an adult mobile home community, 387 sites with pool, spa, clubhouse, and other recreational facilities.

Sunflower Resort at El Mirage Road south of Bell Road, an adult R.V.-Travel Trailer community, 1,100 sites, with pools and spas, tennis courts, clubhouse, and other recreational facilities.

Happy Trails at Bell Road and Cotton Lane, an adult R.V. resort community, 2,200 sites, 320 acres, with a golf course, pools and spas, park areas, tennis courts, clubhouses, and other recreational facilities.

Cactus Flower Resort at Grand Avenue and Bullard Avenue, 160 acres planned for condominium apartments and a golf course and all other recreational facilities.

Grand-Bell Ranch at Grand Avenue between Dysart and Litchfield Roads west to Greenway Road. Mixed residential units to be built on 360 acres.

Sun Village at Grand Avenue, north of Litchfield Road to Bell Road on the west. A 3,000 unit self-contained community to be built on 300 acres by Estes Homes.

County Land - Between the northern boundary of Sun City West and the McMicken Dam Outlet Channel, there are about 4,500 acres of land in Maricopa County's unincorporated area. About half of the land is in the State Land Trust. No plans are known for this land. Improvement of El Mirage Road and Deer Valley Road will lead to development of this area.

COMMERCIAL

Commercial development adjacent to Sun City West is taking place along Bell Road from 115th Avenue west to Grand Avenue and along Grand Avenue from El Mirage Road north to Bell Road in El Mirage and Surprise. Most of this development is occurring or is planned for multi-establishment plazas, but it tends to be duplicative of existing establishments and concentrated in retail trade and small service organizations. To the present time, retail stores and services lacking in Sun City West are not being provided in El Mirage and Surprise. Some announced plans are expected to change this situation.

El Mirage

These commercial units are in operation along Grand Avenue in El Mirage:

Retail Trade	14
Services	31
Professional Service	1
Medical/Dental	1

These are not the only commercial activities in El Mirage - only those closest to and most accessible to Sun City West are included. It should be noted again that planning in El Mirage is based on providing employment opportunities in commercial establishments in preference to planning for housing for commuters to other communities.

A small industrial park at El Mirage Road north of Grand Avenue is also a part of the City's planning.

Surprise

Commercial establishments in Surprise are more convenient than those in El Mirage for use by Sun City West residents. Commercial zones are in operation and being built along Bell Road, Grand Avenue, Santa Fe Drive, and Greasewood Street. There are these businesses now in operation:

Retail Trade	35
Services	36
Medical/Dental	1

Much land in Surprise is held by developers and mixed-use developments, commercial, multi-family, and single family units in planned communities, have already been announced. Development to the population potential of the vacant land will require labor-intensive business and industry to locate near Surprise or provision of greatly improved transportation routes to employment opportunities in Glendale and Phoenix.

As can be seen from the commercial business lists of El Mirage and Surprise, there are currently no financial institutions in either community. Development of planned communities could change that situation in the future. Although neither of these neighbors is adjacent to existing arterial or expressway routes in any direction, in the time frame beyond that spanned by this plan Grand Avenue improvement and north-south routes along Dysart Road and Cotton Lane should make them much more accessible to car and truck traffic.

County Land North of Sun City West

Up to the present time, the very poor road system available has prevented intensive development of County and State land north of Sun City West along Deer Valley, Pinnacle Peak, Happy Valley, and Jomax Roads. Connectors to Deer Valley Road at El Mirage, 135th Avenue, and 151st Avenue and the preliminary plan for a Northwest Loop Road between the Beardsley Canal and Deer Valley Road suggest that development activity may be seen in subdivided planned communities just across Deer Valley Road from Sun City West within the next five years.

IV. CIRCULATION OF TRAFFIC AND TRANSPORTATION

A. Within Sun City West, a traffic circulation network has been designed to carry automotive, golf car, and bicycle traffic on common streets. Three main entries to Sun City West have been planned at the intersections of the arterial streets: Johnson Boulevard at Bell Road, Meeker Boulevard at Grand Avenue, and Johnson Boulevard at Grand Avenue. Three secondary entries are provided at the intersections of the collector streets: Beardsley Road at El Mirage Road, 135th Avenue at Deer Valley Road, and 151st Avenue at Deer Valley Road. Within the community, arterial links are provided by Camino del Sol from Johnson to Meeker and Stardust Boulevard to 128th Avenue from Johnson north of Bell to Johnson east of Grand. The collector entries link to these arterial streets.

At present, with continuing construction and undeveloped units, the distribution of traffic is not according to plan. There is heavier than planned use of the Johnson-Bell entry and two of the collectors, Beardsley and Spanish Garden.

B. Traffic Controls

Traffic control signs and signals within Sun City West are under the jurisdiction of Maricopa County. Location and timing of installations are determined by standard traffic counting procedures. Because of the development pattern of Sun City West, some traffic volumes have reached or

exceeded projected peak values for the fully-built community. The Maricopa County Highway Department has been slow to recognize these special conditions, but signal installations have now been scheduled for - in order of priority - El Mirage and Bell, Camino del Sol and Meeker, Johnson and Conquistador, and Johnson, Aleppo, 133rd. A program for stop sign installations is being discussed.

C. Public Transportation

The only public transportation available to Sun City West is provided by the Dial-A-Ride service of Sun City Area Transit, Inc. Highway bus service is available out of Sun City, and rail and air service is available out of Phoenix. Proposals have been made for metropolitan area rail-based public transportation but no definitive plan for such a service exists.

V. DRAINAGE

During the six and one-half years of existence of Sun City West, there has never been a reported incident of storm water run-off causing damage to a residence. The system of storm water drainage in the initial 1977 Master Plan for Sun City West relied on streets as interceptor drains and canals fed from street run-off as trunk lines to carry rainfall to the Agua Fria river bed. During storms characteristic of this area, there has been considerable inconvenience, annoyance, and financial loss to homeowners because of erosion and high water levels.

Starting in early 1984, corrective measures were undertaken in built-up areas to prevent recurrence of the difficulties found. Two corrective projects to be completed in 1985 will divert storm water from areas where flooding has been found between Stardust and Hillcrest Golf Courses and along Spanish Garden Drive between Camino del Sol and Aleppo. Work completed in 1984 has given a high degree of relief from street flooding in the areas where drainage was modified.

The Sun City West Master Plan Update of November 1984 has taken a lesson from these earlier difficulties. The remainder of the drainage system of the community will depend on diversion of storm water to a system of retention basins and golf course lakes to buffer the flow of water between streets and drainage canals. Success of this approach or further need for corrections will be shown by future experience.

VI. UTILITY SERVICES

Sun City West utility services are all provided by private companies paid directly by the residents. A survey of water, sewerage, solid waste disposal, telephone, electricity, natural gas, and Cable TV utilities has been made to develop suitable assumptions for the future. No assumptions are made as to future costs of utilities.

A. Water

Sun City West Utilities Company has wells available and is developing additional wells to serve Sun City West. The November 1984 Master Plan Update reviews the supply/demand situation. Because of the lower than anticipated use of water by residents, recycle available to supply golf course irrigation demand is lower and ground water demand higher than projected in 1977. Ample rainfall and slower than expected growth of Sun City West have provided some natural recharge of the aquifer being used.

Water quality is monitored by the Arizona Department of Health Services Water Quality Control Office. Periodic checks are made for a group of impurities such as dissolved solids, nitrates, and coliform bacteria. Special analyses have been made recently for toxic chemicals used by citrus growers. Sun City West water has been approved in all cases.

No problem in supply or delivery in the period to 1995 is anticipated. There has been a delay in starting work on the second water plant which is intended to service the higher pressure (northern) zone of the Sun City West system. This delay is producing flow restriction at times of peak demand by water users in that zone. Deliverability will be restored when the pressurization system at Aurora and Stardust Boulevard is completed.

There is, however, an additional element in the picture of water availability. The Arizona Department of Water Resources has, through the Ground Water Management Act of 1980, authority to enforce controls on withdrawal of ground water by individuals or utilities. In the case of Sun City West, this authority is responsible for a requirement that per capita usage of water in Sun City West be reduced six percent by 1990. Enforcement of the reduction will be through fines levied on the water utility which, in turn, will collect them from the water-takers it serves.

In the case of Sun City West, per capita per day use of water is already quite low, in the 200 to 250 gallons per person per day range. The main burden for further per capita use reduction will have to fall on water use for horticulture and golf courses. Additional means to assure conservation of water need to be developed.

B. Sewerage

A tertiary treatment sewage plant serves Sun City West. Within the community, sewage is collected by gravity flow to the southeast corner where a pumping station and force main carry it across the Agua Fria river bed north-east to a dedicated sewage treatment plant operated by the Sun City West Utilities Company. Facilities now in service can handle 2.14 million gallons per day of waste water, the average flow from about 19,000 dwellings based on current flow experience. As the community grows, plant capability to handle peak demands will need to be monitored. A second plant stage to double its capacity can be built when needed. Right now, treated effluent is being used to irrigate adjacent fields of alfalfa. The system has been planned and partially built to pipe treated effluent to Sun City West to water the golf courses. This water re-use is being delayed by need to get State of Arizona permission for installation of a pipe line across the Agua Fria river bed.

No problem with the sewers and treatment system is foreseen in the period to 1990.

C. Solid Waste Disposal

Sun City West solid wastes are collected efficiently by a private contractor, S. Parks and Sons, and disposed in a privately-owned and operated landfill along the Agua Fria river bed in El Mirage. Although the landfill owners have enough acreage to continue sanitary disposal for another fifteen to twenty years, the City of El Mirage has declared the landfill a public nuisance, refused to license expansion on to the adjacent acreage planned for expansion, and is in the process of stopping existing operations through court action. The City has filed in Arizona Superior Court for a cease and desist order against the landfill operators. During the past year, efforts to locate a new site have been made by Maricopa County and the City of El Mirage. At this time, closure of the El Mirage landfill will necessitate use of a county landfill in Morristown, 26 miles from Sun City West. A closer and larger landfill to solve solid waste disposal problems for at least twenty years will not be available before late 1986.

D. Telephone

A modern sub-station within two miles of almost every Sun City West residence has been built to accommodate our telephone service needs. No problem with facilities is expected in the period to 1995 but present and planned changes in telephone utility structure should be expected to produce some servicing inconveniences. Unregulated competitive inter-state long distance call services already are available to residents. Similar intra-state point-to-point services are likely within a year. There is no likelihood that the free calling area of the Sun City West exchange will be expanded. Residents needing to call beyond our free

area frequently should consider alternative lower cost service plans offered by Mountain Bell or, in the future, by its competitors.

E. Electric Power Supply

Arizona Public Service Company (APS) which holds the franchise to supply electric power at regulated rates to Sun City West residences and businesses has had a surplus of power to the extent that it is exporting power to California utilities under multi-year contracts. The major problem which must be recognized is that expansion of the APS service was planned on the basis that nuclear power would be available from the Palo Verde reactors in 1984.

Because of continuing delays in start-up of the nuclear reactors, the company is now in the position of having to find import power and re-start mothballed obsolescent plants which are oil-fired. The circumstances are such that inconveniences of users of electricity may become a fact at times of peak demand. The APS difficulties are not subject to improvement through this Long Range Plan. Service to businesses and new residences will have to be watched carefully.

F. Natural Gas Supply

There is no natural gas service in Sun City West at present although a transmission line runs along Bell Road outside our wall. By design, our homes are not built to take gas service. The utility which could undertake a natural gas business here is Southwest Gas Company of Las Vegas, Nevada. It may be interested in expanding its market. Logical users in Sun City West would be the Recreation Centers and food service establishments for uses now on liquefied propane gas. Private homes might wish to connect gas for swimming pool and water heaters if economical service can be provided.

G. Cable Television

Cable television service in Sun City West is provided under a County license now in the hands of Storer Cable TV operating out of Peoria. Because of the limited acceptance of Cable TV in Sun City West, about 35% of the homes to which service is available have contracted for it, complete service coverage of the whole community has not been installed. Various steps to extend the coverage to new residential units have been explored. At this time, no practical method of improving service has been found. A more aggressive licensee with greater financial resources is needed.

VII. OTHER COMMUNITY SERVICES

A. Fire Protection

For Phase I of Sun City West, a Fire Protection District Referendum vote was passed. The Fire District Board elected by the residents to operate this District has contracted with Rural Metro Corporation of Scottsdale for manpower and equipment to provide emergency services in our community. Fire fighting, paramedical, and ambulance services are furnished. An "emergical" service is available to the handicapped and housebound residents.

Sun City West Fire District is a political entity of the State of Arizona with power to own property, enter contracts, and establish budgets, and to collect taxes to fund its expenditures. Its Board members are elected to staggered terms by vote of qualified voters of Sun City West. The District owns a single fire station on Camino del Sol just east of Johnson Boulevard. The single station is probably sufficient to serve all of Phase I. The Sun City West Master Plan Update does provide a site two miles to the northwest of the present station on which a second station could be built if there were a need.

The only future shortcoming of the existing fire protection equipment is lack of an extension ladder or "cherry picker" which might be needed for fires in multi-story buildings. At least three such buildings are planned for Sun City West - Madison House apartments, the Heights apartments, and the Sun City West Hospital which is expected to be a five-story building.

B. Police Protection

Because Sun City West is an unincorporated development in Maricopa County, its police protection is provided by the Maricopa County Sheriff's Department from a sub-station at Bell and Dysart Roads just outside of Sun City West. The limited services from the Sheriff are supplemented by the Sun City West Sheriff's Posse. The Posse has only auxiliary police powers - traffic direction, surveillance patrols, and emergency assistance to deputies, for example. It cannot make arrests or issue citations for violations of ordinances.

The nature of our community is such that felonies and misdemeanors are infrequent although house break-ins, confidence games, contract defaults, and traffic infractions are not uncommon. Our total needs for law enforcement services can stand a little more consideration as Sun City West grows.

C. Recreation Facilities

The recreation facilities of Sun City West are outstanding although they are geared more to the active participator in sports than to the quiet seeker of diversions. It should be understood by residents that planning and operation of recreation is the means by which growth of the community is being secured. Neither investment nor funding of activities is frugal or governed by normal cost-benefit evaluations. The objective now is to have all the lures that are possible to attract home buyers to Sun City West. This Long Range Plan is in no way intended to serve the planning needs or goals of the Recreation Centers of Sun City West, Inc.

There is surprisingly little private activity in Sun City West to provide proprietary recreation locations or services, probably a reflection of the complete menu provided already. We have two private golf clubs, Briarwood Country Club and Hillcrest, but no night club, no movie theater. Continuing satisfaction with our present status will be kept under observation.

D. Health and Human Services

The services in this classification include those needed for physical and mental well-being of residents. Particular emphasis should be placed on planning to make it possible for family groups to function in as near-normal as possible a home environment for as much of their lives as possible. The sizable population cohorts of 75-84 and 84-plus in our projections suggest that needs in Sun City West will be far greater than in communities where there is no age-segregation of residents. We can anticipate in our community a substantial need for services to house bound, frail, physically-handicapped and psychically-handicapped residents. Counseling, moral support, friendship, financial aid, and physical assistance will all be needed.

1. In-Home Services

There is a tendency to think of only two categories of human service, healthy life at home caring for oneself with the help of family and institutional life in a nursing home or hospital. Experience in Sun City over its twenty year existence has developed a broad range of services between these extremes. Many such in-home service alternatives are shared with Sun City West or have been set up separately. Our planning should concentrate on how to expand these in-home services and how to fill the gaps which exist so that life, liberty, and the pursuit of happiness can continue to be amplified.

Without claiming to be entirely complete, we can list the following human service resources for Sun City West:

Books for the housebound.

Crisis counseling by telephone and in person.

Day care and respite care for the frail elderly.

Handicapped persons social groups.

Hospice assistance for terminal illnesses.

Meals on Wheels for housebound and handicapped or convalescent persons.

Recording for the blind.

Sickroom equipment - walkers, wheelchairs, and other needs on loan.

Substance Abuse clinics and support groups.

Sun Sound radio for the blind and paraplegic.

Transportation services for all classes.

An important addition to this program of services is coordination and organization by the case management service recently introduced by the Sun City Area Community Council. The future involvement of this approach in Sun City West needs to be planned. Concentration on health promotion and disease prevention should be incorporated into plans.

2. Sheltered Living Apartments

There is a spectrum of housing arrangements which can be expected to find use by Sun City West. The range runs from high security apartments with limited services to catered living apartments which add meal service and some transportation service, to congregate living homes arranging companions with complementary capabilities, to life-care communities. The demand for high security, high personal service living from the

Frail elderly or isolated older individual in a community is usually high. Such sheltered living complexes defer the need for the continuous skilled care of a nursing home. A part of the 75 and older age cohorts of the Sun City West population, assumed to be one-third for purposes of this Plan, provides the local demand. The assumptions for our time period are:

	<u>1985</u>	<u>1990</u>	<u>1995</u>
Units Needed	235	370	540

A sheltered living unit now being built, Madison House, will accommodate about 295 residents.

3. Nursing Homes

A figure often used to estimate need for long term care of disabled and elderly persons is 4% of the 65 plus population. In Sun City West, this ratio leads to:

	<u>1985</u>	<u>1990</u>	<u>1995</u>
Nursing Home Beds Needed	215	340	490

The active lifestyle of our residents and the alternative care arrangements discussed in earlier parts of this section suggest that our nursing home bed demand may be only half of the national norm, thus:

	<u>1985</u>	<u>1990</u>	<u>1995</u>
	107	170	245

One 120-bed nursing home, Sunwest, opened in June of 1985. A second 120-bed home has been planned for construction by Sun Health Corporation. These homes, along with three under construction in or next to Sun City, should over-supply the market for the next ten years.

4. Acute Care Hospital

For the past two years, there has been a great effort to discourage the use of acute care hospital beds and to prevent the construction of new hospital facilities in areas where population is growing. Legislation regulating approval of new hospital construction has expired and new means of preventing

new hospital construction have not been developed. In these circumstances, it seems that a plan announced by Sun Health Corporation to build a five story 203 bed hospital at Meeker Boulevard and Grand Avenue will be put into effect.

The need for acute care hospital beds for Sun City West residents is subject to some dispute. The 203-bed hospital will be much larger than Sun City West alone requires but it is intended to service El Mirage, Surprise, Litchfield Park, and other small communities nearby as well as us. Hospital cost containment measures have impacted hospital bed use. Shorter confinements and outpatient treatment are being used instead of hospital confinement, leading to an acute care bed need of 5 1/3 per 1000 population. Sun City West's requirements are:

	<u>1985</u>	<u>1990</u>	<u>1995</u>
Acute Care Bed Need	65	100	148

Considering the population growth of the communities which will be served, the proposed hospital will probably be adequate into the early 1990's.

H. DISASTER EMERGENCY PLAN

The question has been raised as to the preparedness of Sun City West to handle a disaster emergency in which need for concerted action by residents under conditions of hazard and limited communication exists. The most likely source of such an emergency is widespread fire. Other sources in order of decreasing probability are: an accident leading to spillage of a flammable or toxic material on peripheral roads or, less likely, on our streets; a hostage situation in a residence, store, or bank; a transformer rupture; leakage from a tank car on the Santa Fe Southern Pacific tracks along Grand Avenue because of a crossing accident, an act of vandalism or terrorism creating emergency conditions; leakage from a parked tank car on the Santa Fe Southern Pacific sidings along Grand Avenue; a release of airborne radioactive material at Palo Verde nuclear plant; and flooding due to extremely rapid and heavy rainfall on Sun City West.

The existing plan for managing emergencies in Sun City West is that of the Maricopa County Department of Civil Defense and Emergency Services. Execution of the County Plan is the responsibility of the Maricopa County Sheriff's De-

partment. Available manpower, first from the Bell Road-Dysart Road substation and, if needed, from other substations or the central department is to be provided. The Sun City West Posse under direction of deputies is to assist in crowd control, traffic control, evacuation of residents from their homes, and protection of vacant property. The plan provides for an Emergency Operations Center in Phoenix and use of commercial radio for communication.

Although there may be some skepticism about the practicality of a Disaster Emergency Plan which requires coordination of a number of independent organizations under chaotic circumstances, a local alternative is not available because there is no individual or group in Sun City West to exercise the centralized authority and responsibility required by disaster emergency circumstances. Maricopa County cannot delegate such authority and responsibility to an ever-changing group of volunteers.

VIII. COMMUNITY PLANNING ISSUES

The preceding parts of this Long Range Plan have reviewed the status of Phase I of Sun City West, assumptions which can be made about its future, and known plans of other organizations for the planning period 1985 - 1995. There are a number of issues to be faced by the community in the future years. The Planning Committee of the Sun City West Property Owners and Residents Association has set up a subcommittee to study how these issues may be handled with minimum impact on the unity and harmony of the residents.

In the first place, it is important to recognize what PORA is not. Many residents have the mistaken impression that PORA has the powers of the city government which they left to move here. PORA is a membership association representing the majority of the households of Sun City West. It has no employees. All work is done by volunteers whose reward is the sense of having helped the community by doing something they like to do and are capable of doing. PORA is not even a quasi-government. It has no funds, no full-time staff, no police power to run the community. It can get things done only to the extent that it can influence and move those who do have the power to act. Sun City West residents' future is in the hands of Maricopa County, DEVCO, Sun City West Recreation Centers, Inc., and other developers in Sun City West.

Our first community issue, then, is:

How to organize our efforts so that what the majority of the residents want to do gets done.

This issue is being addressed by the Unification Subcommittee of the PORA Planning Committee. Other issues are highlighted as they came up in the earlier parts of this Plan.

A. Housing Mix

The figures given for numbers of apartments, duplexes, and single-family homes need to be monitored. There will apparently be a business impetus toward multi-story apartment-town house dwelling units. This trend is evident in two such developments in progress in Sun City West (Madison House and The Heights). It is also the current trend for utilizing remaining available land in Sun City.

A community position on this issue needs to be developed.

B. Commercial Development

The amount of commercially-zoned land in Sun City West is consistent with the idea that it would be a regional trading center. The much scaled-down size of Sun City West, the fact that Phase II will not materialize, and adjacent community development for part-time residents and commercial uses make the regional center concept improbable. Del E. Webb Development Company has sold plots of commercial land to other development companies with time-limited restrictive covenants as to architecture and permitted uses, but there is no assurance those uses can be installed within the time limits allotted. This situation increases the difficulty of meeting residents' desires as to location, timing, and mix of commercial uses. As in the case of Sun City, at some future time, Sun City West may also face rezoning of remaining land for uses not consistent with community thinking. Even now, homeowners abutting commercial plots have not been made aware by Webb new home sales people of the kinds of business neighbors permitted to occupy adjacent land and the potential for special use permits or rezoning of the plots by Maricopa County.

Actions which the community can pursue are familiarization with the existing variety of commercial establishments and available land in the DEVCO Plan and organization of a community-based effort to arrive at new businesses and services wanted by the residents. For example, there is a broad community interest in a local hospital and a second supermarket. Our organization to further realization of those interests has been ineffectual so far.

C. Adjacent Community Development

Our greatest need now is to establish a working relationship with Surprise to keep informed about their plans for land at our boundary. For example, a Metro Center-like development at Grand Avenue and Bell Road has been proposed and zoning for it approved by the Surprise Town Council. While the City of El Mirage is concentrating on planning and development of a kind which will provide wider employment opportunities for present residents, Surprise is planning an integrated residential community. Developers holding land in Surprise expect it to grow to a population of 80,000 to 120,000 from its present level of 4,500. El Mirage expects to limit population to about 18,000, a growth of about 200%.

The part of the Grand Avenue commercial strip within El Mirage is occupied by businesses to a high degree of saturation already. Little further development, except by redevelopment, should be anticipated along Grand Avenue. Future El Mirage commercial development will be along El Mirage Road. From the Surprise town line, Greenway Road, and Grand Avenue, northwest along Grand to Dysart Road, the Grand Avenue commercial strip is almost fully developed also. There is potential for further development along Santa Fe Drive from Factory Street to Dysart Road and high potential for extensive development along the part of Grand Avenue opposite Sun City West's boundary from Dysart Road to the Beardsley Canal.

Because El Mirage and Surprise are incorporated communities, we have no power except that of persuasion to influence their plans. It has been suggested that a Northwest Valley Community federation might be a good means of coordinating planning and that Sun City and Sun City West resident associations could participate. This possibility should be pursued.

The northern boundary of Sun City West is Deer Valley Road. The land across Deer Valley Road north to the Maricopa County Line is unincorporated now and development is controlled by Maricopa County. Sun City West residents should work in particular with the Planning and Zoning Commission and the Board of Supervisors to assure that development across Deer Valley Road is compatible with Sun City West. This northern area will become particularly attractive to developers if long-range highway department plans surrounding Sun City West are fulfilled.

D. Circulation of Traffic and Transportation

The need for traffic controls and signs is governed by County Highway Department traffic counts. The counts should be kept up to date and used to influence control and sign installations.

A metropolitan region transportation group is being formed. PORA should be represented on that group.

E. Drainage

Performance of the drainage improvements in built-up parts of Sun City West needs to be monitored. As the remainder of our community is built up, the new storm water drainage system must be kept under observation.

F. Utilities

Water conservation procedures and means to assure compliance with them will be needed.

Sewer system expansion may be required as Sun City West nears full occupancy.

Solid waste disposal is a current planning issue which, if resolved properly, will not recur for more than twenty years. The only currently cost-effective disposal method for Sun City West is sanitary landfill.

Utility rate cases and operating practices should be kept under closer observation. Both efficiency and economy of service are needed.

An alternative cable television service provider could enhance service and expand it if an aggressive entrepreneur could be brought into Sun City West.

G. Other Community Services

Possible need for better protection of structures in Sun City West having a height greater than twenty feet should be considered.

Police protection against burglaries and break-ins in homes and fraud and confidence games practices on individuals needs to get greater consideration.

Health promotion and disease prevention planning should be a community effort.

H. Disaster Emergency Management

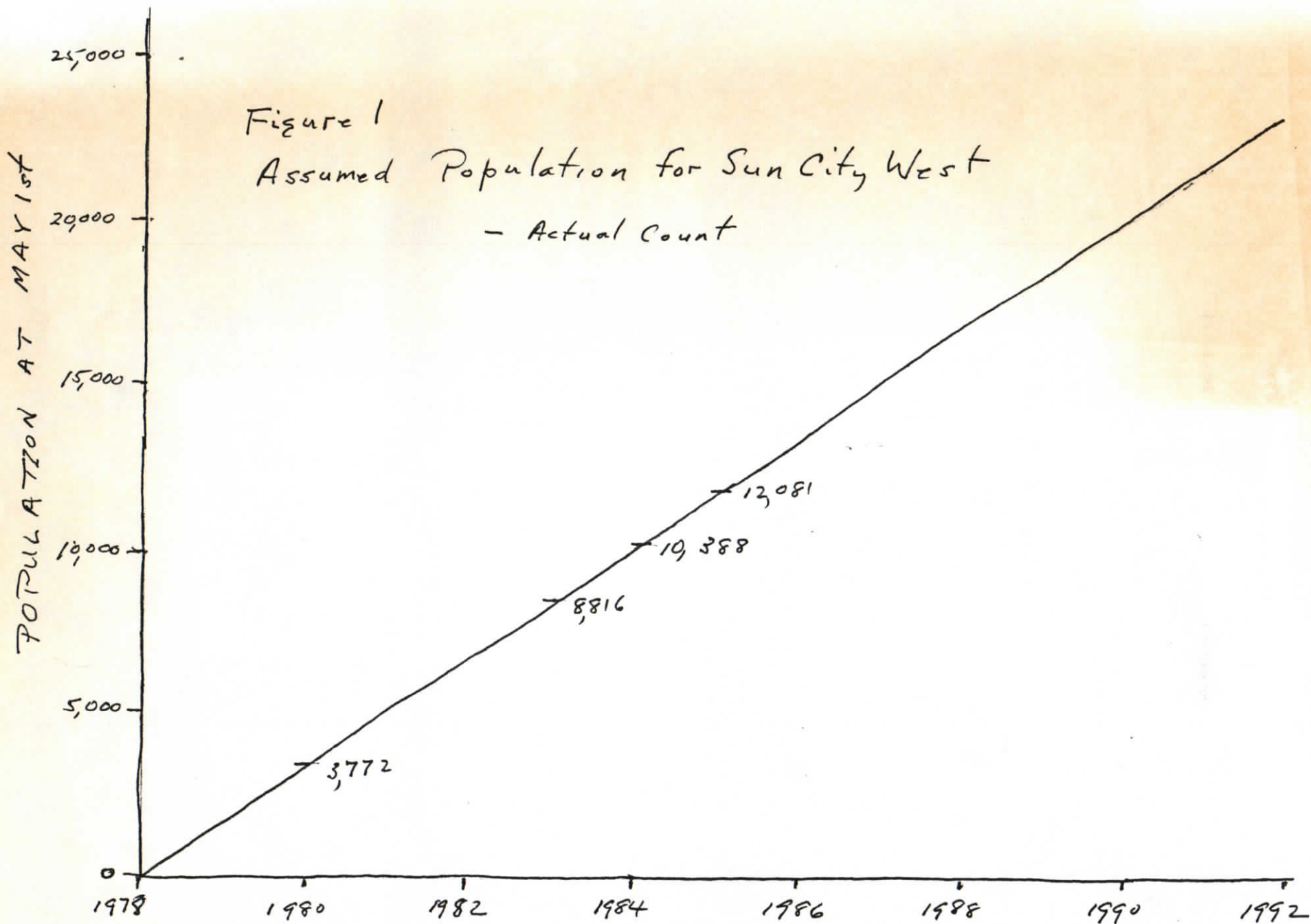
The system proposed for managing disaster emergencies around and in Sun City West is fragile at best and may not perform at all when called upon. Suitable community leadership which can maintain itself ready for many years is required.

IX. CONCLUDING REMARKS

One common idea runs through all of the preceding discussion. For a successful future, Sun City West requires and deserves better means of community management and control than can be provided by the voluntary association of residents into a membership organization manned by part-time unpaid workers and funded by minimal voluntary dues collection. This need must be addressed vigorously and promptly.

EP

Figure 1
Assumed Population for Sun City West
- Actual Count



GOVERNANCE OF SUN CITY WEST AFTER
DEL WEBB COMMUNITIES, INC.
COMPLETES ITS RESIDENTIAL
CONSTRUCTION PROGRAM

FINAL REPORT OF THE
GOVERNANCE COMMITTEE
TO THE BOARD OF DIRECTORS OF
THE SUN CITY WEST
PROPERTY OWNERS AND RESIDENTS
ASSOCIATION

October, 1988

TABLE OF CONTENTS

	<u>PAGE</u>
EXECUTIVE SUMMARY	i
BACKGROUND	1
PHASE THREE SPECIAL STUDY COMMITTEE ACTIVITIES	
PURPOSES	2
MEMBERSHIP	2
PLANNING ACTIVITIES	2
RESULTS OF OPTIONS INVESTIGATIONS	
OPTIONS FOUND NOT VIABLE	
Option 2, Annexation	4
Option 3, Special Legislative Districts	4
Option 4, Homeowners Association	5
OPTIONS NOW CONSIDERED FEASIBLE	
Option 1, Remain As-Is	6
- Reasons to Prefer County Government	7
- Reasons to Not Choose County Government	7
Option 5, Incorporation	9
- The Incorporation Process	9
- Steps Needed to Incorporate a Community	9
- Acts of Governance Needed after Incorporation	11
- Reasons to Prefer Self-Government by Incorporation	12
- Reasons Not to Choose Self-Government by Incorporation	13
WHAT CAN WE CONCLUDE?	14
RECOMMENDATIONS	15
APPENDIX A -- COMMUNITY MANAGEMENT OPTIONS PRESENTATION	
APPENDIX B -- MUNICIPAL INCORPORATION IN ARIZONA, PUBLICATION OF THE LEAGUE OF ARIZONA CITIES AND TOWNS	
APPENDIX C -- BUDGET PROPOSAL FOR SUN CITY WEST (INCORPORATED) FISCAL YEAR 1991 PRESENTATION	

EXECUTIVE SUMMARY
FOR THE REPORT OF THE GOVERNANCE COMMITTEE:
GOVERNANCE OF SUN CITY WEST AFTER DEL WEBB COMMUNITIES, INC.
COMPLETES ITS RESIDENTIAL CONSTRUCTION PROGRAM

The Governance Committee of the Sun City West Property Owners and Residents Association, Inc. (PORA) was established in 1987 to lead a Special Joint Study Committee having broad representation of community agencies. The objectives of this Special Study Committee were:

- Study the pros and cons of all alternative forms of governance for Sun City West.
- Communicate the benefits and drawbacks of each form to all homeowners/residents.
- Have Sun City West homeowners/residents determine - on a timely basis - the form of governance preferred by the majority.

This report completes the third phase of a study of Sun City West governance which began in the spring of 1985.

In the first phase, a subcommittee of the PORA Planning Committee defined five options for community management after Del Webb Communities, Inc. left the community. These options were: Remain As-Is, Annexation, Special Legislative Districts, Merger of PORA and the Recreation Centers of Sun City West, Inc. and Incorporation. The first phase report "Options Available for Sun City West after Devco", by Ernest J. Edison, concluded that Annexation and Special Legislative Districts should not be considered further. Study of the PORA-Recreation Centers merger option was recommended and the Remain As-Is and Incorporation options were considered additional possible solutions.

It was concluded by a Special PORA-Recreation Centers Joint Study Committee that the merger option was not feasible because of the difficulties of combining two completely different agencies. A memorandum report recommended that the Special Joint Study Committee be given new direction and broad representation of all interested community groups to study all alternatives for self-government again.

In phase one Annexation was ruled out because neither Surprise, the only incorporated community contiguous to us, nor our own residents would want to unite. Special Legislative Districts, under Arizona laws, are not allowed to exist for the purpose of providing a full range of municipal services. Police, street and highway maintenance and utility services cannot be provided by such districts. As already mentioned, Merger of PORA and the Recreation Centers would require many difficult, divisive steps of unknown legality which have never been performed in the past.

Options now viable are Remain As-Is and Incorporation. The Special Study Committee set the ground-rule that residents want no more services than they receive at present and will replace by volunteer efforts any services not provided by the option being evaluated.

Remain As-Is really means to take no action to be self-governing, to accept any changes resulting from government by Maricopa County and to make up for loss of Del Webb Communities help by volunteer efforts. Change will be inevitable. Reasons for preferring this option and for not choosing County government instead of self-government are given in this report.

Incorporation was examined under these guidelines:

1. Incorporated Sun City West would be governed under a charter adopted by vote of the residents.
2. City services needed would be provided by entering into contracts with agencies qualified to provide them. Sun City West would be a "Contract City".
3. Only those services now provided by Maricopa County and Del Webb Communities, Inc. would become municipally-supported services. Residents would continue to pay for private services which they are paying for now.

The report considers The Incorporation Process, Steps Needed to Incorporate a Community, Acts of Governance Needed after Incorporation, Reasons to Prefer Self-Government by Incorporation and Reasons Not to Choose Self-Government by Incorporation.

CONCLUSIONS

Remain As-Is cannot produce the result it promises. Taking no action to control change won't prevent change.

Incorporation gives local control of change at the expense of being responsible for acting and risking doing something wrong.

Self-government by local residents is more likely to have our interests at heart than government by lawmakers and officials who live and work miles away from us.

Shared revenues and local fees and franchises will provide enough funds to give better control of planning, zoning, transportation, architecture and landscape, law enforcement, street and highway maintenance and lifestyle. New local taxes are not necessary.

Our residents should be asked to choose home rule, which we can control, instead of County rule, which will be increasingly difficult for us to influence as the County grows.

RECOMMENDATIONS

The Governance Committee recommends to the PORA Board:

- that this report be presented to the membership,
- that the membership be asked to vote to initiate a petition for an incorporation election,
- and that the guidelines that Sun City West be a Charter, Contract City, providing only those services Maricopa County and Del Webb Communities now provide to supplement services residents already pay for directly, be included in the petition.

BACKGROUND:

The report which follows completes the third phase of an activity which was initiated in the spring of 1985.

In the first phase, a subcommittee of the Sun City West Property Owners and Residents Association (PORA) Planning Committee was established to begin planning for the transition from control by the community developer, Del Webb Communities, Inc., to some other controlling body. The transition timing will be determined by the completion of the residential building component of the Sun City West Master Plan Update approved by the Maricopa County Board of Supervisors in November, 1984. The timeframe assumed for the transition is 1992 to 1994. This assumption is probably over-generous. Housing market conditions at present and current efforts to take over ownership of Del Webb Communities, Inc, make it possible that transition from the developer to another controlling body may be required on very short notice. The need to be prepared for transition on a crash basis is urgent. Preparation should be done now.

The first-phase Planning subcommittee defined five options for post-developer community control:

1. Remain As-Is, that is, be governed by the Maricopa County Board of Supervisors with liaison to the Supervisors through volunteer community organizations and individuals.
2. Seek annexation to an adjacent incorporated community.
3. Establish one or several special governmental districts, like the Sun City West Fire District or Street Lighting District, to provide all necessary government services.
4. Organize, by merger of PORA and the Recreation Centers of Sun City West, Inc., a single association with membership required of all homeowners and residents and having authority to provide needed government services.
5. Under the laws and procedures of the State of Arizona become an incorporated City with power of self-government by qualified electors.

These five options were carefully examined and findings were reported to the public in the report "Options Available for Sun City West after Devco" by Ernest J, Edison.

The second phase, initiated by motions of the Board of PORA and the Recreation Centers Advisory Board, was establishment of a Special Joint Study Committee to evaluate the potential for using Option 4 as the means of providing necessary governmental service to the community. Investigation by this Committee for more than a year led to a memorandum report in

June, 1987 concluding that Option 4 was not viable and recommending that the Special Joint Study Committee be given new direction to provide for studies of all other alternatives for self-government and that Committee membership be expanded to include other community group representatives.

The report which follows gives the final results of the activities of this third phase Special Study Committee.

PHASE THREE SPECIAL STUDY COMMITTEE ACTIVITIES:

Purposes

The objectives of the Special Study Committee with broadened membership were defined as:

- Thorough study of the pros and cons of all alternative forms of governance for Sun City West.
- Communication of the benefits and drawbacks of each form to all homeowners/residents.
- Having Sun City West homeowners/residents determine - on a timely basis - the form of governance preferred by the majority.

Membership

The members of the Phase Three Special Study Committee were:
Larry McIntyre, PORA and Advisory Board, Chairman
Alice Bolster, AARP
Ernest Edison, PORA
Marshall Garth, PORA
Elaine McCraith, AAUW and PORA
Jack O'Connor, Advisory Board
Allen Powell, PORA
Bob Siegel, PORA
Al Spanjer, PORA
Phil Vision, PORA and Advisory Board

Planning Activities

The members listed organized as a Steering Committee to arrange and present a series of Seminars and Workshops so that the general public could become informed about the work and results of the two earlier phases of governance studies and introduce new questions and directions for further work.

Meetings with heads of community organizations were held in August and October, 1987 to get leadership reactions to the planned format and material for the Seminars and Workshops. Several public meetings were needed to cover all of the aspects of future governance. It was decided that the first meeting on October 29, 1987 would cover Options 1 through 4.

Later seminars and workshops would consider different aspects of Option 5, Incorporation, in hopes of answering concerns of residents.

In preparation for a December Seminar on the topic "Should Sun City West Incorporate?" the Steering Committee met with Les Merydith, President of Citizens for Self Government of Sun City and Tom Baudek, City Manager of Paradise Valley to expand knowledge about the process and results of incorporation.

The Should We Incorporate? Seminar included handouts and visual aids briefly reviewing Options 1 through 5 and recapitulating discussions of the October Workshops. These handouts and visual aids are included as Appendix A of this report.

It became obvious at this time that few residents were attending all of the Workshops and Seminars. At each one, questions and comments went back to items previously presented. Synopses of information once covered or omissions of such information, on the supposition that it had already been transferred to those in attendance, left the attendees confused or angry that they were not getting a complete picture of every Option considered by the Study Committee since its 1985 inception. In addition, the total number of persons who had attended any or all of our public meetings was an extremely small percentage of the total population of Sun City West. New audiences were also reached by invited presentations by Steering Committee members at scheduled meetings of clubs and other groups, but even these meetings did little to increase the percentage of informed persons among our population.

The Steering Committee decided at this time to organize into seven subcommittees and to man them with additional volunteers. Each subcommittee was to cover a single topic to provide input for this report. The topical assignments were:

- Communications
- Contract Services
- Environmental {Lifestyle}
- Financial
- Legal
- Planning
- Transportation

Five of these subcommittees did become active and provided information which is incorporated into this report. Brief reports from each subcommittee have been given to the residents at public meetings.

RESULTS OF OPTION INVESTIGATIONS:

Options Found Not Viable

In our first phase report Ernest Edison concluded that Option 2, Annexation, and Option 3, Special Districts, could not provide practical means of self-government for Sun City West.

Annexation is a process by which residents or property owners of an unincorporated area adjacent to a town or city can become integrated into that town or city. Both the unincorporated area residents and owners and the incorporated community governing body must have majority votes favoring the annexation. The annexation process is initiated in the unincorporated area by a petition signed by both the majority of property owners in number and a majority of property owners in assessed value of property being annexed. The petition, containing a legal description of the unincorporated property to be annexed with an enumeration of the properties in it by ownerships and by assessed values, is submitted to the governing body, the council, of the contiguous incorporated town or city. That council in turn must frame and adopt an ordinance accepting the petition and enabling the annexation. In usual circumstances, both parties have mutual interests in annexation. For the "Boot" area contiguous to northwest Phoenix, the most recent annexation at the time of this report, Boot residents wanted to have economical and more-effective fire, police and utility services from the City of Phoenix. The Phoenix City Council wanted the annexation for the additional revenue provided and for the future potential of additional annexations nearby.

In our case, annexation would have to be to the Town of Surprise which is now the only incorporated community contiguous to Sun City West. Surprise, by earlier annexations, effectively blocks any other town or city from accepting an annexation petition from our homeowners. There is no other ownership in numbers or in value which can exceed the vote of homeowners needed to present a petition to Surprise. Furthermore, it is extremely doubtful that the Surprise Town Council would vote to accept the petition of a community in which the number of registered voters is ten times as great as that of its own present roster of electors. It was concluded, therefore, that an annexation wanted by neither party should not be looked to as a possibility for future governance of Sun City West.

Special Legislative Districts were looked at in terms of having a single district with the ability to serve all municipal functions in Sun City West. Arizona law provides

for two kinds of Special Districts, Independent or Dependent, for narrowly defined purposes. Sun City West has a District of each kind.

The Sun City West Fire District is an Independent Special District, that is, it has many of the characteristics of an incorporated community. Resident electors of Sun City West vote for the Fire District Board members. The Board has the power to set the budget for both capital and operating expenses, it can and has purchased property, entered into an operating contract and controls operations through actions of the Board at open public meetings. Until this fiscal year it has been recipient of shared revenue support from Maricopa County. Unlike towns and cities its tax rate is set by the County Assessor, who also collects the taxes and disburses them to the Fire District.

The Sun City West Street Lighting District is a Dependent Special District, that is, it is a District of Maricopa County under control of the Board of Supervisors, established in order to supply a special service in a limited area, in this case, street lighting in Sun City West under a contract between the County and Arizona Public Service. The County Assessor determines the tax levy needed to provide the lighting service and collects it from the residents as a separate item on the County tax bill.

Under present Arizona law, Special Districts cannot be used to provide general municipal services which are available to unincorporated areas from the County. Among general municipal services, planning and zoning, utility services, highway and street construction and maintenance, law enforcement, clinics and hospitals, for example, may not be provided by independent special districts. These restrictions eliminate most of the things needed in Sun City West and led to the conclusion that use of special districts was an impractical Option for Self-Government after Del Webb Communities, Inc. completes its residential building program.

The second phase Special Joint Study Committee examined in detail means by which Option 4, a Homeowners Association, might be organized to provide the community services being provided by the voluntary membership Sun City West Property Owners and Residents Association, the mandatory membership Recreation Centers of Sun City West And the private for-profit company, Del Webb Communities, Inc. It became evident that there is no specified legal procedure by which a voluntary membership association and a mandatory membership association can be merged. It would apparently require that each party adopt at separate membership meetings a common set of Articles of Incorporation and in addition each homeowner would have to agree to continue obligations under sales

contracts and covenants by filing appropriate legal documents with the County Clerk. It was further uncertain how covenants between Del Webb Communities, Inc. and commercial property owners would be transferred to a Homeowners Association.

Finally, the duties and responsibilities of the Association would require expanded support and staff, yet it could not carry out a number of important functions such as planning and zoning control, architectural control, determining police protection levels needed, having representation on intergovernment groups and reducing tax burdens on residents. Staff salaries would require an additional membership assessment of about \$20 to \$30 per home per year with no offsetting income from services provided.

The second phase joint special study committee recommended that further consideration of Option 4 be dropped and that an expanded committee having broader community membership look at all potential alternatives for future self-government.

OPTIONS NOW CONSIDERED FEASIBLE:

The third phase of this investigation of alternatives for self-government of Sun City West after the developer relinquishes control and support of the community found only one Option, 5, which would provide true self-government by the residents of Sun City West. The alternative remaining Option, 1, is not to remain as-is, but is to accept government by the Maricopa County Board of Supervisors under whatever rules and procedures that Board or any successor County-wide governing body may be required to enforce in the future.

In looking further at Options 1 and 5 it has been taken as a ground rule that residents are completely willing to accept the present level of County Highway Department and Sheriff's Department services and regulations from their future governing body. Residents are also assumed willing to replace Del Webb Communities services and funding with volunteer efforts if they cannot be funded by the government body chosen.

Remain As-Is

To truly Remain As-Is would impose two impossible conditions on our future in Sun City West.

- That there could be no future changes in the operations of Maricopa County which affect us.

- That Del Webb Communities, Inc. remain in Sun City West permanently, providing the subsidies, services and influence it has exercised, until the end of time.

We believe that no one actually expects no changes in our community in the future. Remain As-Is really means to take no action to be self-governing, to accept whatever changes come as a result of government by Maricopa County and to make up for the lost help of Del Webb Communities, Inc. by volunteer organizations and efforts. Change here will be inevitable.

Reasons to Prefer County Government

There are a number of reasons which are cited to choose County Government for Sun City West.

- Maricopa County provides known services which are acceptable. There is no need to have another layer of government to do the same things.
- An addition of a local government will cause taxes to go up. Revenue-sharing between the State and incorporated cities and towns can be withdrawn unilaterally and, besides, it is insufficient to support local government. Local property taxes will be required.
- Local government will lead to corrupt, self-serving political leaders and indifferent bureaucrats.
- There are positive, constructive, effective communications between community volunteer organizations and County officials.
- Volunteers substituted for paid employees within the community, such as the Posse and Prides, reduce our cost of government.
- County officials can be counted on for special attention to resolve problems here.
- Because our residents are very active in supporting the majority political party we can get State Legislators and County Supervisors to adopt laws and ordinances which we want when such action is necessary.
- In any case, County officials will consider what is best for us.
- Choosing not to change to local self-government will prevent changes in our lifestyle, such as loss of senior overlay zoning, loss of private control of the Recreation Centers and mandated public housing projects.
- Because Sun City West will be fully developed according to the Master Plan, we will have little reason to be concerned with zoning changes when Del Webb Communities, Inc. leaves the community.

Reasons to Not Choose County Government

There are also a number of reasons why County Government may not be the best choice for Sun City West.

- Maricopa County services to Sun City West cannot include

those now provided by Del Webb Communities, Inc. which we like, such as enforcement of our Master Plan, control of architectural uniformity, control of zoning to standards higher than the County Zoning Regulations permit, enforcement of signage controls more stringent than Zoning Regulations permit, special maintenance of common areas, extra street cleaning, maintenance of drainage canals, and funding of community events, for example.

- Revenue-sharing between the State and counties, cities and towns is an Arizona practice of many years standing. It might be changed by legislative action, but those legislators voting for change would have to expect violent reaction from voters living in incorporated communities.

- County Government can have corrupt, self-serving politicians and indifferent bureaucrats. In fact they are more likely in large government remote from the voter than in small local government.

- It is a fact that people volunteer to work under governments of cities as well as counties.

- In recent months State Legislators and County Supervisors have given us special attention we would prefer not to have. There is a general feeling that we are avoiding our fair share of the cost of government, that services intended for rural areas shouldn't go to affluent urbanized developed communities. Ways to make us pay extra are being found.

- Lifestyle can be better assured continuance by a local government that must try to respond to its own limited electorate than by a remote and probably unconcerned government in which we are a minority of a minority of the voters.

- When Del Webb Communities, Inc. completes residential building in accordance with its Master Plan there will be over 100 acres of undeveloped commercial land in the community. About 70 acres is in the heart of the city, the rest are two neighborhood shopping centers and scattered small corner sites. Rezoning requests or alternative permitted uses are certainly in our future. Are we better off with control in the County Administration Building than in one in Sun City West? Moreover, those of us who came here from aging communities are aware of redevelopment projects to get more money out of areas where governmental neglect of standards maintenance has led to deterioration of neighborhoods.

- The County Government you see now may not be the one you will get in the future. Two possible future government changes are to adopt County Home Rule or, less likely, to convert to Metropolitan Government. County Home Rule would make it possible that existing restrictions on special taxes to compensate for high service demands for non-rural communities in the County could be set aside.

Looking at the pros and cons just cited, it is difficult to

sense the basis for passionate resistance and the continual repetition of clearly false arguments by those residents who favor the option of remaining as-is. One surmise is that many people have a sense of freedom from restraints of government because it is remote from Sun City West and there is little evident intrusion into our lives. A second surmise is that absence of a local government responds to the feeling of retired people that their turn to be free of life's responsibilities has come.

Incorporation

Our fifth Option is to use the process which the State of Arizona has legislated and funded since Territorial days to allow areas where sufficient population and population density exist to become independent, self-governing cities or towns. Consideration by the Steering Committee led to the following guidelines for discussions of Incorporation with residents at public meetings.

1. Incorporated Sun City West would be governed under a charter adopted by vote of the residents.
2. City services needed would be provided by entering into contracts with agencies qualified to provide them. Sun City West would be a "Contract City".
3. Only those services now provided by Maricopa County and Del Webb Communities, Inc. would become municipally-supported services. Residents would continue to pay for private services which they are paying for now.

The Incorporation Process

As was mentioned above, the entire incorporation process is detailed in State law. A complete, detailed, authoritative presentation of all the facts about the process, in layman's language, has been published by the League of Arizona Cities and Towns. At our Committee meetings and public Workshops and Seminars this publication, "Municipal Incorporation in Arizona" was made available and many copies were picked up by residents. "Municipal Incorporation in Arizona" is included in its entirety in this report as Appendix B. The discussion which follows integrates the information obtained and organized by the subcommittees of the Governance Committee of PORA since January, 1988, as presented to our residents at public meetings.

Steps Needed to Incorporate a Community

1. The incorporation process would be started by the constitution of a Committee or Association of Sun City West

qualified electors organized for the purpose of carrying through that process. The Committee or Association would proceed to carry out all the steps which follow.

2. Prepare a petition with a map and legal description of the proposed incorporation boundaries. The petition, map and legal description should be submitted to the Head of the Maricopa County Registration and Election Department for review and unofficial approval. After any needed corrections, additions and clarifications the petition could then be submitted and given official approval, a process requiring about one week.

3. During the petition preparation process, discussions would be initiated with the governing officials of every incorporated community within six miles of the defined boundaries of Sun City West to obtain from them official resolutions of assent to incorporation of Sun City West. Resolutions of Assent will be required from El Mirage, Glendale, Peoria, Surprise and Youngtown in our case.

4. After petition approval, the Committee will have 180 days or less to obtain valid signatures of no less than ten (10) percent of the registered voters living within the area proposed for incorporation. The Resolutions of Assent must also be secured during the 180 day period in order to file them and the signed petitions with the Clerk of the Maricopa County Board of Supervisors for verification that a minimum number of valid signatures has been obtained. The Board is allowed up to 60 days to research, verify, accept and approve the petition.

5. In the event that there are valid signatures of two-thirds of the qualified electors of the petitioning area submitted on the petitions, it is mandatory for the Board of Supervisors to declare the community incorporated.

6. In the event that the petitions have less than two-thirds but more than ten percent of qualified elector signatures, the Board calls an election on the question of incorporation. The actual election must be held not later than 120 days after the filing of the petition. Only qualified electors living in the area proposed for incorporation may vote at the election.

7. If a majority of the qualified electors voting at the election favor incorporation, the Board of Supervisors must declare the community incorporated. If the community turns down incorporation, another election cannot be held for one year.

8. When the Board of Supervisors approves incorporation it

also appoints seven persons from the community to serve as the first city council. This appointed council must meet within twenty days to elect a mayor from its membership. The appointed council serves until a new council is elected in May following the incorporation.

9. The Arizona Constitution provides that an incorporated city of more than 3,500 population may become a CHARTER CITY. The objective of the CHARTER CITY designation is to give a greater degree of self-determination to residents. Sun City West should vote to become a CHARTER CITY. A petition signed by 25% of the qualified electors, as determined by the preceding municipal election, is required to hold a charter election at city expense. That election, to decide for or against having a charter, also elects a Board of Freeholders (property owners), if having a charter is favored. The Board of Freeholders must frame a charter within 90 days. The proposed charter must be ratified by a majority vote in another election and approved by signature of the Governor of Arizona.

Acts of Governance Needed after Incorporation

Until July 1 after incorporation, Maricopa County will continue to provide services to Sun City West. During that period a number of actions will have to be taken by the City Council.

1. The present Sun City West Master Plan Update of November, 1984 should be adopted as the City's Master Plan.
2. The Maricopa County Zoning Ordinances should also be adopted, subject to review and revision as needed to conform them to the Master Plan
3. Pending receipt of income due to incorporated cities under State laws, borrowing by warrants should be arranged if necessary.
4. A charter should be drawn up and adopted by a city-wide vote of electors.
5. Necessary administrative staff should be recruited and hired.
6. Necessary contracts for law enforcement and street and drainage canal maintenance services from Maricopa County should be drawn up and negotiated.
7. The Sun City West Property Owners and Residents Association should continue in operation as a voluntary membership association providing its present services to

residents of the community. Because it is a private corporation, the Recreation Centers of Sun City West, Inc. will be unaffected by incorporation.

8. Many services and subsidies from Del Webb Communities, Inc. to voluntary organizations of Sun City West such as the Posse, Prides, Community Fund grants and services such as enforcement of deed restrictions on commercial property, signage regulations, architectural design and landscaping control, promotional events to support resale of homes in the community and so on should be examined and action planned as needed.

9. As an incorporated city, our community will receive a share of State Lottery funds to support public transportation of our residents. Discussion of contract services with appropriate providers, the Regional Public Transportation Authority, El Mirage-Surprise Dial-a-Ride, Sun Cities Area Transit and taxi and van services should be undertaken to maximize cost-effectiveness for our residents.

10. An income and expense budget should be prepared and presented at public hearings prior to adoption in accordance with our city charter. As has been discussed already, this budget will deal only with providing and administering those services and subsidies now provided to Sun City West by Maricopa County and Del Webb Communities, Inc. It will govern city expenditures as of July 1 following incorporation.

Reasons to Prefer Self-Government by Incorporation

- Incorporation to become a Charter City operating by contract services will place those who legislate, enforce and administer our ordinances and services inside our community under our direct observation and influence instead of in downtown Phoenix and other locations scattered over Maricopa County. Our officials will be dependent on our votes alone. They cannot view us as less than one percent of the constituents who elect them and therefore of negligible importance.

- Planning, zoning, commercial deed restriction enforcement and architectural control can be to our present standards rather than to less-strict county ordinances. We can keep our present Master Plan instead of having it become ineffective as soon as the developer completes residential construction.

- Sun City West will have the possibility of protecting the community from adverse adjacent development through the annexation process.

- We ourselves, through self-government, can better protect our lifestyle than can remote authorities who have only vague knowledge of how we want to live in this community and who can ignore our wishes because they owe us practically nothing for their election or appointment.

- A very intensive study, by the PORA Finance subcommittee, of projected income and expense of incorporated Sun City West, Appendix C, shows that operation as a contract service, Charter City performing only the services now provided by Maricopa County and Del Webb Communities, Inc. will lead to building up a substantial reserve fund after all the bills have been paid each year.

Reasons Not to Choose Self-Government by Incorporation

The reasons which have been given previously for preferring County government are cited as reasons not to choose incorporation. Those reasons are summarized here and several more are added.

- Maricopa County gives known, acceptable services. Another layer of government isn't needed.

- Local government means higher taxes. Shared revenues can be withdrawn and are sure to be insufficient to support local government anyhow. Local property taxes will be required.

- Political leaders will be corrupt and self-serving, bureaucrats will be indifferent.

- Communications with County officials now are positive, constructive and effective.

- County officials give special attention to our problems.

- Volunteers (Posse, Prides) instead of paid employees reduce our cost of government.

- State Legislators and County Supervisors will act as we want because we are active supporters of the majority party.

- County officials choose to do what is best for us.

- Local self-government will change our lifestyle. We will lose senior overlay zoning, our Recreation Centers will have to be opened to the public, public housing projects will be mandated, our community will be opened to outsiders.

- We don't need zoning or architectural control because Sun City West will have been completed according to the Master Plan when Del Webb Communities, Inc. leaves.

- Accepting funding from the State means that the State will control us.
- An incorporated city will be more likely to be a target for liability suits than an unincorporated area.
- People who favor incorporation are only looking for soft political jobs for themselves.
- Now is perfect - why change?

What Can We Conclude?

Sun City West residents have a choice between two Options.

Option 1 cannot produce the result it promises and its supporters claim they expect, to Remain As-Is. There is absolutely no way that taking no action to better control change will prevent change from happening.

Option 5 can produce local control of change but is seen as carrying with it the baggage of responsibility for action and the risk of doing something wrong, thus making things worse instead of better.

Looked at dispassionately, self-government has a better chance of keeping Sun City West closer to As-Is than county government does, because it can do the things that the developer is now doing which make the As-Is of Sun City West. Who will better have our interests at heart, a council and administration within our city walls, elected by and responsible only to we residents of Sun City West or Legislators, Supervisors and administrators in offices miles away, elected by and responsible to millions of other people with wants and needs entirely different from ours?

The studies of the PORA Governance Committee have clearly shown that an incorporated Sun City West can be funded by shared revenue and local income from fees and franchises. They have shown that better control of planning, zoning, transportation, architecture and landscape, law enforcement, street maintenance and all the factors which make up our lifestyle can be achieved through self-government. On the down side, they have shown that a level of responsibility and restraint will have to be exercised which is greater than is now required of Sun City West residents!

Our conclusion is that home rule, which we can control, will be better for us than county rule, which will be increasingly difficult for us to influence. Our residents should be asked to make the choice.

Recommendations

The PORA Governance Committee recommends:

- That the PORA Board vote to have this report presented to its membership.
- That the membership should be asked to vote to initiate a petition for incorporation and to have an election on that issue.
- That Incorporated Sun City West be defined in the petition as subject to the following conditions:

1. Incorporated Sun City West would be governed under a charter adopted by vote of the residents.
2. City services needed would be provided by entering into contracts with agencies qualified to provide them. Sun City West would be a "Contract City".
3. Only those services now provided by Maricopa County and Del Webb Communities, Inc. would become municipally-supported services. Residents would continue to pay for private services which they are paying for now.

APPENDIX A

**COMMUNITY
MANAGEMENT
OPTIONS**

WHY CHANGE?

MORE

- **EXPENSES**
- **RESPONSIBILITY**

LESS

- **QUALITY LIFESTYLE**

NOW IS PERFECT

- **NO ACTION**
- **ANNEXATION**
- **SPECIAL DISTRICTS**
- **MEMBERSHIP ASS'N**
- **INCORPORATION**

?

FOR YOUR INFORMATION
OPTIONS CONSIDERED AND STUDIED IN DEPTH

A small committee made up of equal representation of the PORA and Recreation Center Board of Directors studied the available options to Sun City West residents after Del Webb leaves. After a year of research, their conclusions were made public last spring.

The options studied and conclusions reached were:

1. Do Nothing - continue as-is with PORA & Rec Centers.
This is possible, but would still require a number of changes because of the withdrawal of Webb's financial support, planning and leadership guidance.
2. Annexation by another incorporated city.
This is not an acceptable option in the foreseeable future of SCW.
3. Special legislative districts.
Not feasible under current Arizona laws.
4. Combination of PORA and the Recreation Centers.
An initial study indicated this was a possibility for SCW, but a more detailed study showed this was not a viable option.
5. Incorporation.
No conclusions reached other than this option is a possibility and needs more study and community input.

A Steering Committee and other community residents are continuing the study of Incorporation. Hopefully these workshops will bring in a large number of interested people who will become involved with us in seeking answers to all the questions and concerns.

If you have been involved in municipal government or know of others who have expertise in government fiscal operations, planning, zoning, deed restrictions, architectural control, public safety, city administration, maintenance operations, public transportation, health, welfare, education, and communications - please contact the PORA office at 584-4288 and volunteer your/their services.

TAKE NO ACTION

1. CONTRACTED SERVICES REMAIN AS IS
2. VOLUNTARY SERVICES REMAIN AS IS
3. COMUNITY FURNITURE STAYS AS NOW
INSTALLED
4. COUNTY SERVICES CAN CHANGE
5. WEBB SERVICES GONE -- OR REPLACED AT
OUR EXPENSE
6. LIFESTYLE CANT STAY "AS-IS"

CONTRACTED SERVICES WE PAY
FOR WILL REMAIN

REC CENTER, GOLF COURSES,
BOWLING, TRASH PICKUP, SUNDOME
HOSPITAL, SHOPPING CENTERS,
UTILITIES, ETC.

VOLUNTARY SERVICES REMAIN AS IS

PRIDES, POSSE, LENDING HANDS,
PORA, SERVICE CLUBS, ETC.

COMMUNITY FURNITURE WILL REMAIN AS
INSTALLED

WE HAVE OUR:

STREETS, SIDEWALKS, WALLS, MEDIANS,
STORM DRAINAGE, SANITARY SEWERS,
TRAFFIC LIGHTS, STOP SIGNS, ETC.

BUT:

AGEING MAY MAKE CHANGES OR
REPLACEMENT UNAVOIDABLE!

COUNTY SERVICES CAN BE CHANGED --
THEY ARE CONTROLLED BY THE
BOARD OF SUPERVISORS

LAW ENFORCEMENT, COURTS, ZONING
CONTROL, STREET CLEANING AND
MAINTENANCE, DISASTER EMERGENCY
CONTROL, TRAFFIC SIGNS AND
SIGNALS, TAX ASSESSMENT AND COLLECTION,
ETC.

WEBB SERVICES GONE --
OR REPLACED AT RESIDENT'S EXPENSE:

ZONING CONTROL, ARCHITECTURAL CONTROL,
REC CENTERS SUBSIDY, FREE USE OF
BUILDINGS AND SERVICES FOR COMMUNITY
PROJECTS - ARIZONA CLASSIC, CONCERTS IN
THE PARK, ARTS AND CRAFTS FAIR, HEALTH
AND FITNESS WEEK, FIREWORKS, BIRTHDAY
PARTY, GARAGE SALE, ETC.

(NO MORE FREE LUNCH)

LIFESTYLE CANT STAY "AS-IS"

OUR LIFESTYLE NOW IS:

COMMUNITY APPEARANCE -- MASTER PLAN,
ZONING CONTROL, ARCHITECTURAL CONTROL
RESORT-TYPE RECREATION -- ALL
FACILITIES PLANNED AND PROVIDED
HOBBIES, CRAFTS, ARTS -- EVERYTHING
MADE AVAILABLE

ACTIVE AND PASSIVE ENTERTAINMENT --
LIBRARY, SUNDOME, SOCIAL HALL, CLUB
ROOMS, COMMUNITY AFFAIRS THROUGHOUT
THE YEAR

PEOPLE SHARING INTERESTS AND
ACTIVITIES -- EVERYTHING FOR EVERYONE
WHO WANTS TO BE A DOER

WHO WILL BE OUR BENEFACTOR AFTER
THE COMMUNITY IS BUILT-OUT?

RISK OF LIABILITY SUITS

RANK:

1. BARS (HIGH RISK)
2. LIQUOR STORES
3. CHILD CARE CENTERS
- *
8. DOCTORS
9. LAWYERS
- *
12. SMALL BUSINESSES
13. NON-PROFIT ENTITIES
- *
16. CITIES (LOWER RISK)
- *
19. FIRE DISTRICTS

SOURCES: COLORADO INSURANCE COM.
INSURANCE INFO. INST.
NATL. ASSN. OF INS. COM.

FINANCIAL PROJECTIONS FOR AN INCORPORATED SUN CITY WEST

All figures are based on a population of 20,000 or about 75% of the population at buildout, when SCW will have 26,000 to 27,000 people.

SERVICE COSTS/TAXES

Living in an unincorporated community, SCW residents individually contract and pay for services that are included in the taxes of many incorporated cities and towns. Using actual costs of a typical homeowner, they are:

Water and Sewer	\$180
Parks/Recreation - Couple	178
Trash Removal - Quarterly	90

Included in Maricopa County taxes are payments for:

Fire Protection	56
Street Lights	40

Public Safety from the Sheriff's Office and road maintenance is paid for in Maricopa County taxes and provided by the county - SCW services cost the county \$758,712 last year.

This typical homeowner pays \$362 in Maricopa County taxes and is billed a total of \$810 in contract services and taxes. Those payments: taxes (\$362) and services (\$448) will remain the same whether or not Sun City West should incorporate. Neither he nor you will have any control over these costs.

REVENUES

Should Sun City West incorporate, the city would receive \$190.62 (actual '87 to incorporated cities) from the state for every resident.

The revenue figures below were prepared by The League of Arizona Cities and Towns in March 1987 and obtained from these various sources:

State sales and income tax based on 87-88 estimates of the Arizona Department of Revenue.

Highway User Revenue based on 87-88 estimates by the Arizona Department of Transportation.

Vehicle License Tax estimate based on actual collections.

Transportation Assistance Fund estimate based on sharing \$23 million - the maximum distributed to cities and towns by state law.

<u>REVENUE SOURCES</u>	<u>PER CAPITA</u>	<u>20,000 POPULATION</u>
Sales Tax	\$ 54.67	\$1,093,400
Income Tax	53.71	1,074,200
Highway User Revenue Fund	59.88	1,197,600
Vehicle License Tax	13.34	266,800
Local Transportation Assist.	9.02	180,400
Total	\$190.62	\$3,812,400
Other Revenue:		
Franchises, building permits & licenses, liquor licenses, traffic fines		<u>50,320</u>
Total		\$3,862,720

EXPENSES

The expenses for an incorporated Sun City West are taken from a League of Women Voters study conducted for Sun City in 1983. Those expenses have been multiplied by 4% and multiplied once again by four percent. To be sure that enough money has been allocated for expenses, the steering committee has not deducted any funds from the Sun City projections even though the projected 20,000 population figure for Sun City West is about 40% of the people living in our neighboring community.

Only the people can decide how much service, facilities, equipment and depth of personnel they want, but the study of a budget process must start somewhere. This model budget can be pared or expanded as the community chooses.

The only extra services that an incorporated Sun City West would need versus an unincorporated area are Public Safety and Road Maintenance and Rebuilding, both contracted from the county.

Public Safety	\$ 815,000
Street Repair, Rebuilding	1,351,200

A Sheriff's vehicle covering SCW 24 hours a day, 365 days a year costs \$294,000. Maricopa County would be used for street repair. Sun City projections are used here, yet we only have about 65 percent of the area of SC - 14 square miles to 9 in Sun City West.

Other budget items: Facilities and Equipment

Initial Equipment	\$ 25,000
Telephone Installation	1,800
Telephone Billings	5,400
Office Supplies	6,800
Printing, Copying	7,500
Insurance	200,000
Postage	4,400
City Hall/Court	78,000
Legal Services	72,000
Election	27,000
Association Memberships	8,500
Planning/Zoning	28,000
Total of Services/Facilities/Equipment	\$2,621,900

Personnel (Salaries/Benefits)

City Manager	\$ 52,000
Assistant Manager	41,000
City Clerk	22,000
Treasurer	42,000
Englineer	40,000
Magistrate	45,000
Clerical Staff	94,000
Mayor and Council - Expenses	38,000
Total	\$ 374,000

\$2,995,900

REVENUE	\$3,862,720
EXPENSES	<u>2,995,900</u>
RESERVE FUND	\$ 866,820

FINANCIAL SLIDES - SCW INCORPORATION STUDY

**FINANCIAL PROJECTIONS
INCORPORATED SUN CITY WEST
20,000**

1.			
2.	Unincorporated		Incorporated
	\$180	Water and Sewer	\$180
	178	Parks/Recreation (couple)	178
	<u>90</u>	Trash Removal (quarterly)	<u>90</u>
	\$448		\$448

3.		TAXES	
	Unincorporated		Incorporated
	\$362		\$362
		Fire Protection	\$56
		Street Lights	40

4.		RETURNED TO SCW	
	Unincorporated	\$ 0.00	
	Incorporated	190.62	
	Fay/County - Household	362.04	
	Receive/State - Couple	381.24	

5.		REVENUE INFORMATION	
	1. League of Arizona Cities	3/87	
	2. State Taxes/Revenue Dep't	87/88 est.	
	3. Highway User	87/88 est.	
	4. Vehicle License Tax	Actual	
	5. Transportation Assistance	Shared	

6.		REVENUES	PER CAPITA
	State Sales Taxes	\$ 54.67	
	State Income Tax	53.71	
	Highway User Fund	59.88	
	License Tax	13.34	
	Transportation Assistance	<u>9.02</u>	
	Total	\$190.62	

7.		REVENUES	20,000 POP.
	State Sales Taxes	\$1,093,400	
	State Income Tax	1,074,200	
	Highway User Fund	1,197,600	
	Vehicle License	266,800	
	Transportation Assistance	<u>180,400</u>	
	Total	\$3,812,400	

8.	STATE REVENUE	\$3,812,400
	OTHER REVENUE	<u>50,320*</u>
	Total	\$3,862,720

* 1/8 County Revenue '86-Sun City

9.

EXPENSES

League Women Voters Study
For Sun City - 1983

Multiplied by 4%
Multiplied by 4%

10.

ALL SERVICES PROVIDED
EXCEPT

PUBLIC SAFETY: \$ 815,000
STREET REPAIR/REBUILD 1,351,200

11.

FACILITIES/EQUIPMENT

Initial Equipment \$25,000
Telephone 1,800
Office Supplies 6,800
Telephone Bill 5,400
Printing/Copying 7,500

12.

FACILITIES/EQUIPMENT

Insurance \$200,000
Postage 4,400
City Hall/Court 78,000
Legal Services 72,000
Election 27,000
Ass'n Memberships 8,500
Planning/Zoning 28,000

13.

FACILITIES/EQUIPMENT/SERVICES

\$2,621,900

14.

PERSONNEL/SALARIES/BENEFITS

City Manager \$52,000
Ass't Manager 41,000
City Clerk 22,000
Treasurer 42,000

15.

PERSONNEL/SALARIES/BENEFITS

Engineer \$40,000
Magistrate 45,000
Clerical Staff 94,000
Mayor/Council Expenses 38,000

\$374,000

16.

TOTAL EXPENSES
Sun City Projection

Facilities/Equipment \$2,621,900
Personnel 374,000
Total \$2,995,900

17.

INCOME VS EXPENSES
20,000

Income \$3,862,720
Expenses 2,995,900

Reserve Fund \$ 866,820

APPENDIX B

APPENDIX C

THIS IS A BUDGET FOR SUN CITY WEST (INCORPORATED) BEGINNING IN JULY, 1990. THIS ASSUMES 18,500 "REC CARD" HOLDERS WHICH EQUATES TO 14,800 "FULL TIME" RESIDENTS.

("000" OMITTED)
FOR THE FISCAL YEAR
BEGINNING JULY 1, 1990

REVENUES:	GENERAL FUND	HIGHWAY AND STREET	TRANSPOR TATION PROJECTS
distributions from the state and the county:			
HIGHWAY USERS REVENUE			
#FUND-\$66.9		\$990	
#STATE SALES TAX-\$60.5	\$895		
#INCOME TAX-\$58.6	867		
#VEHICLE LICENSE-\$13.8	204		
#LOTTERY-\$8.6			\$127
from other sources			
FRANCHISE TAX	355		
BUILDING PERMITS	338		
LIQUOR LICENSES	13		
TRAFFIC FINES	12		
#BUSINESS LICENSES	8		
INTEREST FROM HWY RESERVE		14	
TOTAL REVENUE AVAILABLE #	\$2,692	\$1,004	\$127
EXPENSES:			
#STREETS		586	
LAW ENFORCEMENT	622		
BUILDING INSPECTION	253		
INSURANCE	140		
MAYOR & COUNCIL-EXPENSES	50		
SPECIAL EVENTS	57		
AUDITOR	12		
ELECTIONS	5		
ZONING & DEED RESTRICTIONS	18		
TRAVEL	10		
NEWS LINE	49		
TRANSPORTATION			131
# TOTAL	\$1,216	\$586	\$131
SALARIES AND WAGES:			
CITY MANAGER	\$56,500		
ATTORNEY	54,000		
ACCOUNTANT	39,800		

89
89

· ENGINEER	34,300	
· CITY CLERK	31,100	
MAGISTRATE	15,000	
SECRETARIES	105,500	
& CLERKS (5)		
FICA, PENSIONS	71,300	
ETC.		
TOTAL	\$407,500	\$408

GENERAL OFFICE EXPENSES:

RENT	\$70,600	
OFFICE SUPPL.	21,200	
JANITOR SERV.	13,900	
TELEPHONE	8,800	
PRINTING	8,100	
BOOKS AND EDUCL	5,900	
POSTAGE	5,400	
EQPT RENTAL	600	
ELECT & WATER	6,000	
TOTAL	\$140,500	\$140

TOTAL EXPENSE BY CATEGORY #	\$1,764	\$586	\$131 87
PROVIDING SURPLUSES: #	928	418	0

NOTE: THERE ARE "GETTING STARTED" COSTS

TELEPHONE EQUIPMENT	\$6,000
CENSUS	50,000
FURNITURE & OFFICE EQPT	27,300
#SHORT TERM INTEREST	6,000
#COMPUTORS	50,000
# TOTAL	139,300

SO THE NET (CASH FLOW) SURPLUS #	-22	+	119	=	97	=	\$1,207
----------------------------------	-------	---	-------	---	------	---	---------

REVISED SEPTEMBER 22, 1988
RCGRAY

BUDGET SUMMARY OF STREET MAINTENANCE PROGRAM

1. Resurfacing	\$309,000
2. Traffic Signalization	50,000
3. Storm Water Drains	50,000
4. Major Repairs	50,000
5. Street Sweeping	35,000
6. Striping	30,000
7. Crack Sealing	25,000
8. Tree Maintenance and Landscaping	29,400
9. Street Signs	<u>7,800</u>
TOTAL	\$586,200

GETTING STARTED EXPENSES

Conduct Census	\$50,000
Furniture & Office Equipment	27,300
Telephone System	6,000
Computer Equipment	50,000
Interest for Short Term Loans	6,000
Total	\$139,300

Furniture and Office Equipment Assumptions:

Item -----	No. Req'd -----	Cost -----
Chairs - Executive Style	2	\$500
Arm	9	1125
Secretary	5	650
Guest	29	1450
Folding	30	800
Desk - Large Executive	2	\$1100
Standard	9	1350
Secretary	5	1000
Tables - Conference	1	\$300
Standard Reference	10	2000
Folding (3 X 6)	5	200
File Cabinet - 3 Drawer	12	\$2400
2 Drawer	4	500
Flat 3 X 3 (Maps)	1	250
Book Case - Executive	2	\$500
Standard	4	400
Typewriter - Long Carriage	1	\$500
Standard Carriage	3	1050
Rostrum	1	\$100
Small P. A. System (Portable)	1	\$325
Overhead Projector	1	\$350
Slide Projector and Screen	1	\$375
Flags and Stand	2	\$300
Small Refrigerator	1	\$200
Portable Microwave	1	\$275
Small Safe	1	\$600
Free Standing Partitions	18	\$1800
Carpeting -Executive Offices	400 sq.ft.	\$1100
Remainder of Bldg	3500 sq. ft.	5800
Total		\$27,300

Initial Financing Assumptions:

1. Costs for telephone and census will be paid in full when billed.	\$56,000
2. 33% initial payment will be made for computer and furniture.	35,700
3. 15% of total yearly salaries will be incurred in the first 3 months after incorporation.	61,200
4. 15% of yearly general office expense will be incurred in the first 3 months after incorporation.	20,000
5. Contingency fund	27,100
Total	<u>\$200,000</u>

6. The County will continue to provide for highway, streets and law enforcement until the first of July after incorporation.

7. Three months after incorporation, receipts from sales tax will be adequate to pay current expenses. (This should amount to \$74,500/month). At the end of 6 months, adequate revenue will be available to pay off the loan.

8. Borrow \$200,000 for 6 months at 6% interest (maximum charge for cities). Banks in SCW have indicated a willingness to accomodate the city for such a loan. \$6,000

Prepared by C. L. Block
9/23/88