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Meeting ID: 826 3041 9659

Passcode: 581419

**BOARD OF SELECTMAN
SPECIAL MEETING
MONDAY, JANUARY 13, 2025
TOWN HALL MEETING ROOM
6:00 P.M.
AGENDA**

1. Call To Order
2. First Selectman Recognizes Commission On Aging
3. Pledge Of Allegiance
4. Introduction By Town Manager
5. Business Presentations And Discussion Regarding The Redevelopment Of The Kearns School For Senior Affordable Housing
- 5.I. Presentation By 7 Summits Realty And New Samaritan Followed By Board Member Questions

Documents:

[7SUMMITS REALTY GRANBY SENIOR HOUSING PROPOSAL FINAL
9.27.24.PDF](#)
[NEWSAMARITAN.PDF](#)
[7SUMMITSNEWSAMARITANINTERVIEW.PDF](#)

- 5.II. Presentation By Timothy Bobroske And Michael Chadwick Followed By Board Member Questions

Documents:

[BOBROSKE AND CHADWICK KEARNS SCHOOL RFP FINAL WITH
PLANS.PDF](#)
[BOBROSKECHADWICKINTERVIEW.PDF](#)

6. Public Session

7. Adjournment

The Next Regular Meeting is the Three Board Meeting Scheduled for January 21, 2025.



ORIGINAL

5 CANTON ROAD KEARNS SCHOOL RFP AFFORDABLE SENIOR HOUSING

Granby, Connecticut

RESPONSE TO REQUEST FOR
PROPOSAL

**Town of Granby
Abby Kenyon**

**15 North Granby Road
Granby, CT 06035**

**Due: September 27, 2024
by 12pm**

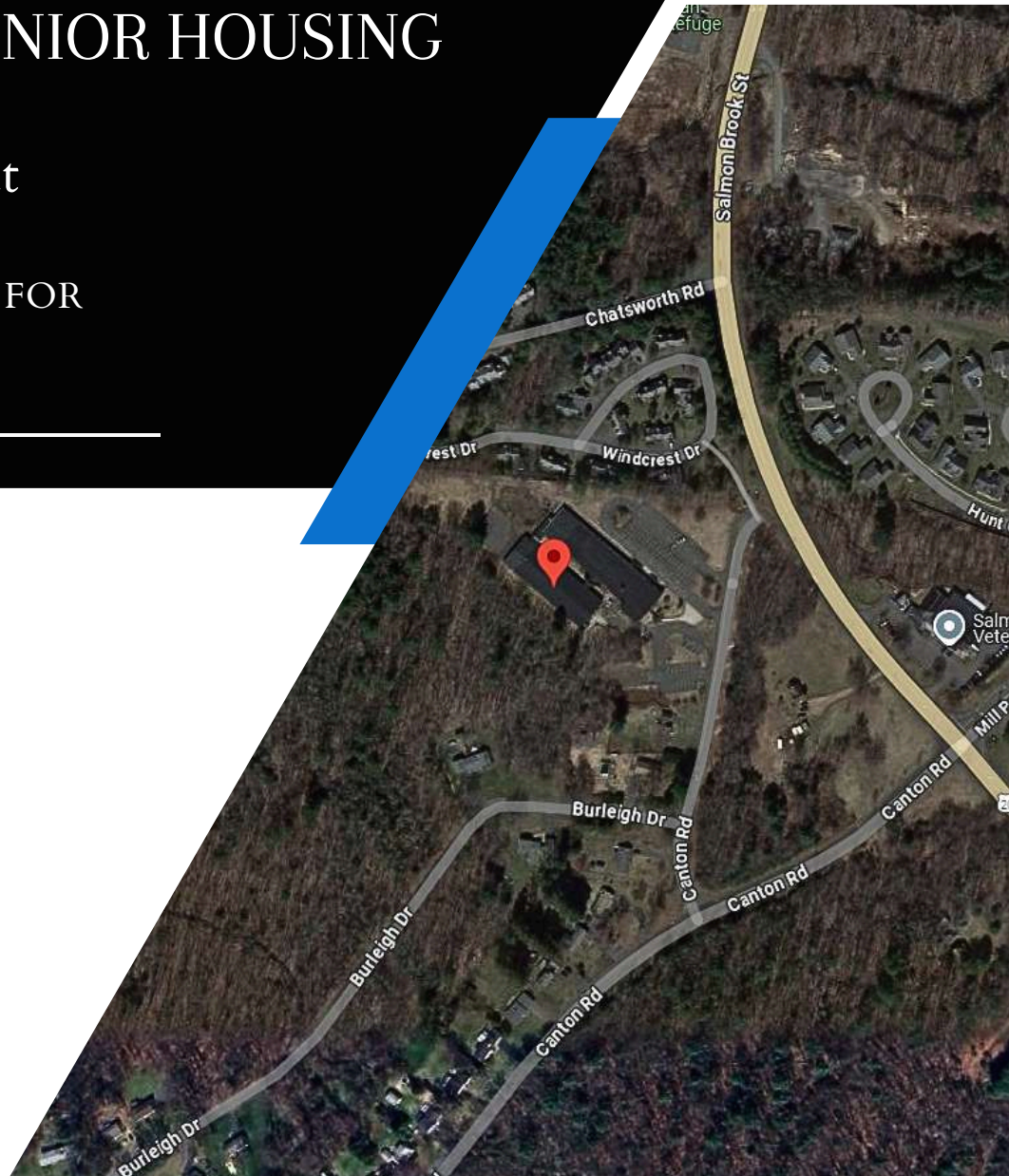


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Information & Team Qualifications**

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Summary & Site Plan**

**SECTION 3: Development Costs, Timeline
& Site Acquisition Price**



SECTION 1

Letter of Interest
Developer Information
Firm Qualifications





September 27, 2024

Town of Granby
Community Development Department
15 North Granby Road
Granby, CT 06035

RE: RFP Affordable Senior Housing, Assisted Living or Congregate Living Facility, 5 Canton Road, Granby

7 Summits Realty, LLC is pleased to present this proposal in response to the Town of Granby's Request for Proposals (RFP) for the development of the 33.8 acre land parcel on 5 Canton Road. With options to provide affordable senior housing, assisted living, or a congregate living facility, this proposed development will address housing needs, promote community integration, generate economic benefits, utilize existing infrastructure, and preserve community character within the Town of Granby.

Due to an aging population, an affordable housing option was proposed for the former F.M. Kearns Primary School. The Board of Selectmen determined senior affordable housing may be an appropriate use of this property with alternate forms of senior housing being considered. This proposal envisions a development that best meets all of these standards and interests of the community. Our team includes 7Summits Realty, Housing Smarts, DeMarco Management Corporation, Freeman Companies, QA+M Architecture, and 7Summits Construction.

The 7 Summits team is excited with our potential role in helping to facilitate this sustained transformation and look forward to a continued progression to create, in partnership with the Town of Granby and the local community, a truly dynamic, livable neighborhood. We have chosen one primary design concept, **Concept 3**, that is discussed further in this proposal. We're proposing to demolish the existing buildings, and construct 120 units of senior housing in two 3-story buildings over two phases. The estimated total development cost (TDC) of the project is \$53,128,248. We expect to start the development process January 2025. We evaluated five options, included in the proposal as Alternative Design Options, that looked at site density, consideration of the nearby wetlands, providing the maximum number of units, quality of living and more. We realize that our design and planning efforts will evolve as we continue this dialogue with the Town and the community, therefore providing a few general concepts that we feel are appropriate to include in the conversation as well.

You have my personal commitment that the goal of 7Summits Realty, and our entire team, is excellence in providing effective, innovative, and cost-effective real estate development solutions in accordance with the Town's infrastructure, economic development, adaptive reuse, housing, and quality-of-life goals. We thank you for this opportunity to present our team's qualifications to partner with you in shaping this important neighborhood and we look forward to receiving an invitation to meet with you in person to more fully articulate our vision, approach, and capabilities.

Please feel free to contact me at any time at rfreeman@7summitscc.com or (860) 712-7077.

Best wishes,

A handwritten signature in blue ink, appearing to read 'R. Freeman', with a long horizontal flourish extending to the right.

Rohan A. Freeman, PE, LS
President and CEO

Firm & Team Qualifications

7 Summits Realty, LLC

Mr. Rohan A. Freeman, PE, LS, President and CEO

(860) 756-5577 – Office (860) 712-7077 – Mobile rffreeman@7summitscc.com

7 Summits Realty, LLC is a Hartford-based, Minority-owned Real Estate Development and Advisory Company

Designated Contact for Negotiation: Rohan A. Freeman, PE, LS

Types/Specialties of developments undertaken by the company: Mixed-Use, including Retail, Office, Residential

Length of time in business: Since January 2014 (9 Years)

Additional Members of the Development and Design Team:

Co-Developer - Sheldon Oaks

Ms. Emily Wolfe, Executive Director (860) 952-4807 ewolfe@sheldonoak.org

Architectural Design – QA+M Architecture

Mr. Tom Arcari, President (860) 470-5016 tarcari@qamarch.com

Site Planning & Development (Engineering & Environmental Services) - Freeman Companies, LLC

Mr. Dennis Goderre PLA, AICP, CUD, Project Manager, Landscape Architecture Studio (860) 251-9550

dgoterre@freemancos.com

Long Term Management - DeMarco Management Corporation

Maria DeMarco, President (860) 951-9411

Construction Management - 7 Summits Construction, LLC

Mr. Josh Johnson, Director of Operations (860) 756-5577 jjohnson@7summitscc.com

Mr. Daniel Paquette, Senior Project Manager/Construction Cost Estimator (860) 756-557 dpaquette@7summitscc.com

Please Note: Informational materials on firms comprising the Development and Design Team are attached herein

ORGANIZATIONAL CHART



7 Summits Realty - Co-Developer

Rohan Freeman, PE, LS
President & CEO

7Summits Construction
Construction Management

Josh Johnson

Director of Operations

Daniel Paquette

Project Manager & Estimator

Freeman Companies
Site Planning & Development

Dennis Goderre,
PLA, AICP, CUD

Project Manager, LA Studio

QA+M Architecture
Architectural Design

Tom Arcari

President

DeMarco

Long-term Management

Sheldon Oaks

Co-Developer

Emily Wolfe

Executive Director

Housing Smarts

Financial

Elizabeth Torres

Executive Director

State of Connecticut

Department of Administrative Services

Supplier Diversity Program



This Certifies

Freeman Companies, LLC

As a

36 John Street Hartford CT 06106

Black American

Small/Minority Business Enterprise

June 11, 2024 through June 11, 2026

Owner(s): Rohan A. Freeman, PE, LS

Contact: Paul A. Rodrigues, PE

E-Mail: prodriques@freemancos.com

Telephone: 8602519550 Ext:

FAX:

Web Address: www.freemancos.com

****Affiliate Companies:** 7 Summits Construction, LLC; 7 Summits Realty, LLC

Supplier Diversity

Meg Yetishelsky

Supplier Diversity Director

Monika Fegmoller

Supplier Diversity Specialist

** A contractor awarded a contract or a portion of a contract under the set-aside program shall not subcontract with any person(s) with whom the contractor is affiliated.

Rohan A. Freeman, PE, LS

7 Summits Realty – Principal / Developer



Rohan A. Freeman, PE, LS is President and CEO of Hartford-based, real estate development and advisory service company 7 Summits Realty, LLC. Rohan founded the company as an organic extension of his highly successful multi-disciplinary engineering and environmental enterprise, Freeman Companies. Mr. Freeman, an accomplished mountaineer, founded Freeman Companies in 2009 and 7 Summits Construction in 2014. Mr. Freeman was the first African-American to climb the highest mountains on all seven continents, called the “Seven Summits” and complete the Adventurer’s Grand Slam (the Seven Summits along with both the north and south poles). 7 Summits has thrived since its inception, and the success of the enterprise has enabled it to advance several major social responsibility goals, especially in and around the company’s basecamp of Hartford, where Mr. Freeman was also raised as a young Jamaican émigré.

Years Professional Experience:
37

Founder, 7 Summits Realty, 7 Summits Construction, Freeman Companies

Professional Engineer and Land Surveyor
Connecticut # PEL.0070046

Professional Engineer:
Massachusetts
New York
Rhode Island

Education:
Bachelor of Science in Civil Engineering, University of Connecticut, 1985

Professional and Civic Affiliations:

- American Society of Civil Engineers
- Connecticut Business and Industries Association
- Connecticut Association of Land Surveyors
- Connecticut Landmarks Governor’s Workforce Council (Appointed by Governor Lamont)

Relevant Experience and Qualifications – Representative Work - 7 Summits Realty:

- “Park and Main” Mixed-Use Residential Development, Hartford
- 36 John Street Office Development, Hartford, CT
- Holcomb Redevelopment, Hartford, CT

Additional Mixed-Use and Residential Projects Currently Under Development by 7 Summits Realty:

- 16 Cedar Street Development LLC, Norwich
- 50 Feldspar, LLC (Feldspar Ridge Housing Development), Glastonbury

Relevant Experience and Qualifications – Representative Work – 7 Summits Construction:

- City of Hartford: Department of Public Works: Sisson Avenue Firehouse # 11 Renovations, Hartford
- City of Hartford: Department of Public Works: Batchelder Elementary School Interior and Exterior Improvements, Hartford
- Hartford School Building Committee (HSBC): Burns Latino Studies Academy - Renovation-as-New, Hartford
- HSBC: Dr. Martin Luther King, Jr. High School Campus Improvements - Renovation-as-New, Hartford
- Grace Academy School: Classroom Renovations (2017 and 2020), Hartford
- New South Hartford Boys & Girls Club, Hartford
- The Children’s Museum: Relocation to the City of Hartford, Hartford
- Urban League of Greater Hartford: Building Assessment for Capital Improvement Program, Hartford Yale
- University: Renovation and Expansion of the Peabody Museum of Natural History, New Haven

Relevant Experience and Qualifications – Representative Work – Freeman Companies:

- Housing Authority of the City of Hartford, Pennrose Properties and The Cloud Company: “Village at Park River” (formerly “Redevelopment of Westbrook Village”), Hartford, Connecticut
- Heritage Housing, Inc.: Parking Lot and Sidewalk Improvements at 5 Hartford Housing Sites (Casa Verde, Enfield Magnolia, Sigourney Square, Barbour Gardens and Ninety Five Vine Street Apartments), Hartford, Connecticut
- RMS Companies and the City of Hartford: “North Crossing” (formerly “Dono”) Mixed-Use Development, Hartford, Connecticut
- City of Hartford: Temporary City Engineer, Hartford, Connecticut
- City of Hartford: On-Call Owner’s Representative: Department of Public Works: Staff Augmentation during a Fixed Period of Time, Hartford, Connecticut
- City of Hartford: Department of Development Services – Planning Division: “On-Call” Assistance for Plan Review and Historic Review, Hartford, Connecticut





DENNIS G. GODERRE, PLA, AICP, CUD

Freeman Companies, LLC

Project Manager, Planning & Landscape Architecture Studio

Registered Landscape Architect State of CT #LAR.0000821

Professional Experience: 28

Education: Bachelor of Science, Landscape Architecture, *University of Connecticut*, Associate of Science, Chemical Engineering, *Thames Valley State Technical School*

SUMMARY

Dennis Goderre brings nearly 30 years of expertise in planning, landscape architecture, and site development, with a specialized focus on housing and mixed-use developments. His work encompasses leading large-scale residential projects, including affordable and workforce housing, where he has successfully guided zone changes, master planning, and site design. Dennis is highly experienced in collaborating with municipal governments, architects, and legal teams to secure approvals and permits for development projects. His work on initiatives such as the Mt. Pleasant Village Housing Development and Barbour Street Development demonstrates his capability in driving transformative residential and mixed-use developments that align with municipal and state policies. Dennis's deep understanding of housing policy, public outreach, and sustainability ensures that every development not only meets immediate needs but also contributes to long-term urban growth and revitalization.

RELEVANT EXPERIENCE

Mt. Pleasant Village Housing Development, New Britain, Connecticut

This project is a 250-unit residential affordable housing project owned by the City of New Britain Housing Authority. Mr. Goderre led the project team to draft and recommend zone changes for a new overlay zoning district procedure for whom the City of New Britain was the applicant. Under this new zoning mechanism, the project received Master Plan approval from the City Council in February 2024, an application led by Mr. Goderre. His responsibility also includes detailed site design, collaborating with the client's architect on master planning and landscape amenities, and leading site engineering for roadway and utility design.

Ann Uccello Streetscape/Arrowhead Redevelopment, Hartford, Connecticut

Mr. Goderre is the Project Manager, Lead Designer, and Lead Landscape Architect for this new streetscape project for the adaptive reuse of the historic Flatiron Building and new Arrowhead Building. This mixed-use development included ground floor retail/commercial space with 14 residential units above. The streetscape recaptures a closed street to create a new vibrant public plaza to complement the new development and create a gateway from Hartford's North End to Downtown. This is an important link between Hartford's North End and Dunkin' Stadium.

16 Cedar Street Workforce Housing, Norwich, Connecticut

This project in Norwich, CT is a new 25-unit residential workforce and affordable housing development situated within a national register historic district. Mr. Goderre is the Project Manager responsible for collaborating with the client's architect for site design and permitting. The site was thoughtfully planned to be sensitive to historic and archeological features and respond to reducing impacts upon the surrounding residential neighborhood.

Barbour Street Development, Hartford, Connecticut

Barbour Street is a new 60-unit workforce/affordable housing mixed use development located at a key neighborhood intersection of Hartford's North End. Mr. Goderre was the Project Manager and Lead Landscape Architect responsible for assisting legal counsel with a zone change application and public hearing which enabled the project under a new zoning district. Mr. Goderre also led the application and public hearing process for the full site development under a special permit and site plan process.

PAST RELEVANT EXPERIENCE

Housing Policy; City of New Haven, City of Willimantic, Town of Coventry, Town of Bolton and Various Municipalities

Dennis worked closely with communities in Connecticut to evaluate housing stock, quality, and availability with various socioeconomic demographics. While the focus of these efforts were primarily Intensive Housing Zone Developments opportunities, additional policy and regulatory outcomes were achieved, including design guidelines, low impact development regulations. Public outreach was at the forefront of these initiatives and included neighborhood groups, leadership, and businesses.

Meriden City Center Initiative Master Plan, Meriden, Connecticut

Planner for the development of the Meriden City Center Initiative Master Plan, a comprehensive plan for the redevelopment of the downtown Meriden area. Currently in the initial feasibility study phase, input will be generated from City staff and a variety of groups and individuals representing the varying interests of merchants and residents. The master plan of development and feasibility report will be generated to explore and initiate funding opportunities. Detailed feasibility analysis will include evaluation of critical zoning issues, reviewing existing utilities and infrastructure, initial environmental review and developing a preliminary opinion of total project cost.

CTNext Innovation District: Thames River Reconnection – Waterfront Master Plan, Groton, Connecticut

In 2017, CTNext launched the Innovation Place program, of which Groton and New London is part. As a HUB of nautical innovation, the district received a grant to enhance placemaking for catalyzing redevelopment in the two communities. As Manager, Dennis oversaw the creation of a redevelopment plan along Thames Street, the historic city center of Groton and along the Thames River. The plan explored new zoning, entailed substantial public outreach, traffic engineering, and urban design/placemaking solutions.



Thomas P. Arcari, AIA

Principal-In-Charge

Tom Arcari is a Principal of QA+M Architecture and has more than 30 years of experience designing and building mixed-use developments, municipal buildings, community + senior centers, recreational, public housing, public safety, industrial, educational, commercial, and residential facilities. He brings his considerable skills to the firm as a strategic thinker, team builder, and new business development leader. Tom partners with clients, stakeholders, consultants, and colleagues to achieve practical solutions to complex, program-driven projects that have been set in a variety of context.

SELECT PROJECTS

Education

Bachelor of Architecture
Roger Williams University

Registrations

Licensed Architect: CT, MA
NCARB Certified - #52360

Affiliations

National Council of Architectural
Registration Boards

American Institute of Architects (AIA)

National Association of Housing
& Redevelopment Officials

Connecticut Recreation and
Parks Association

U.S. Green Building Council

Awards

Recipient of the AIA "Scholar Award"

Roger Williams University Award for
"Excellence in Design"

+ **Building Neighborhoods Together (BNT)**
New construction
Bridgeport, CT

+ **Bridgeport Senior Center**
Renovations + additions
Bridgeport, CT

+ **Waltersville Apartments**
Mixed-use development
Revitalization + redevelopment
Bridgeport, CT

+ **NeighborWorks New Horizons Gaffney Place**
Multi-family, new construction, renovation, + historic restoration
[AIA CT Award Winner](#)
Waterbury, CT

+ **The WYSH House**
New affordable homeless youth shelter
[CBC Project Team Award Winner](#)
Meriden, CT

+ **55 Kondraki Lane**
Affordable housing
Rehabilitation + new construction
Wallingford, CT

+ **Jack's Farm**
New affordable housing
Cheshire, CT

+ **Nye Road**
New residential development
Glastonbury, CT

+ **Veteran's Terrace**
New affordable housing
East Hartford, CT

+ **Sarum Village**
New mixed-income residential units
Salisbury, CT

+ **Essex Place**
New senior affordable housing
Essex, CT

+ **Alfred E. Plant**
New senior affordable housing
West Hartford, CT

+ **Linden Street**
Multi-family renovations
Waterbury, CT

+ **Ridge Road**
New multi-family housing complex
[EDIC Award Winner](#)
Wethersfield, CT

+ **Quarry Walk**
New multi-family apartments
[CREW CT Award Winner](#)
Waterbury, CT

+ **Barbour + Westland Street**
New mixed-use affordable housing + commercial space
Hartford, CT

+ **The Goodwin**
New mixed-income apartments
West Hartford, CT

+ **CIFC Mixed-Use Development**
New elderly housing
Danbury, CT

+ **Foran Towers**
Senior affordable housing
Renovations + upgrades
Milford, CT

+ **Lawnhill Terrace**
Affordable housing
Revitalization
Stamford, CT

+ **Center Village**
Senior affordable housing
Additions + renovations
Glastonbury, CT

+ **Lincoln Park**
Elderly housing
Additions + renovations
Preston, CT

+ **LaSalle Road**
Mixed-use development (DD)
Apartments, street front retail + offices, renovations
West Hartford, CT

+ **Main + Williams Mixed-Use Development**
Parking garages, retail + office spaces, apartments, penthouses + community spaces
New construction
Middletown, CT

+ **Canton Mixed-Use Development**
Medical office, retail building + housing complex
Conceptual design
Canton, CT

+ **Ludlow Commons**
44-unit elderly congregate independent living facility
Renovations + upgrades
Norwalk, CT

+ **Derby Mixed-Use Housing**
Revitalization + development
Apartments, shops, restaurants + residential services
Derby, CT

+ **Arlington Road**
New condominium complex
West Hartford, CT

+ **Kingswood Place**
New luxury condominiums
West Hartford, CT

+ **Stonebridge Estates**
New luxury condominiums
West Hartford, CT

Elizabeth (Liz) Torres

Housing Smarts

64 East Brown Street, West Haven, CT • (203) 314-3835 (c)

Senior level executive with more than 20 years' experience in the nonprofit community development and dedication to ending poverty. Demonstrated ability to launch and grow and lead organizations and initiatives in response to community needs. Deep experience with and extensive network in Connecticut's housing sector. Strong financial acumen and knowledge of real estate development and finance. Excels at strategic planning and implementation, team building, cultivating relationships, public relations and fund raising.

EXPERIENCE

Nov 2019 – **Real Estate Development and Project Management Consultant**
current

Builds the capacity of nonprofit organizations to preserve and/or create affordable housing across the State of CT.

- Comprehensive resource for housing developers big and small. Services include project management support from concept to completion including: leading the development team, site assessment and feasibility, community engagement, stakeholder management, financial modeling, and packaging of funding applications.
 - Manage the new construction of a 31-unit Low Income Housing Tax Credit mixed income affordable housing project in Madison working with a regional nonprofit, The Caleb Group and a local partner, Hope Partners. The total development cost is \$12M. Funding provided by CHFA, State of CT, DOH, Federal Home Loan Bank of Boston. This project is currently under construction.
 - Provide real estate development project management support to The Towers in New Haven, CT to preserve a 328 senior housing development. The total development costs exceed \$20 million. Funding provided by HUD, CHFA, State of CT, DOH, and private donors. This project is currently under renovation.
 - Support the San Juan Center in its real estate development efforts and fundraising strategy. Currently, managing a development pipeline of 74 units scattered in 5 projects throughout the City representing \$15M in community investment.
 - Serve as Open Doors' project manager on a 5-unit townhouse style building that will be newly constructed in Norwalk. The total development costs exceeds \$2 million. Fundin is being provided by the State of CT, DOH and private donors.

Nov 2018 – **Women's Institute for Housing and Economic Development, Hartford, CT**
Aug 2019 *Executive Director*

Led real estate development organization working in Connecticut and Massachusetts to produce and manage more than 800 housing units (30 projects) representing \$250M in community investment.

- Improved financial management practices, managed a \$7.5M annual operating budget and an asset base of \$70M.
- Led Board and staff in a strategic planning process that resulted in a 2019 Strategic Plan and goals to provide the organization with a guide, align the team, measure the organization's progress toward ending homeless and attract investment to the organization.
- Orchestrated organizational resources to close on two projects (totaling \$40M of public/private investments).

- Introduced new staff performance and organizational assessment practices to better align staff efforts with organizational priorities, and to develop a growth mindset and supportive organizational culture.
- Secured \$1,000,000 of Connecticut Housing Finance Authority Housing Tax Credit Contribution Program for two projects in Connecticut.
- Created a Fund Development Plan and Communications Plan. Secured a first \$100,000 of new grant revenue to support real estate development activities.

July 2005 – **Bridgeport Neighborhood Trust, Bridgeport, CT**
 Nov 2018 *Chief Executive Officer*

Led this community-based real estate development and services organization from its start-up phase to become a leader in Connecticut's efforts to close the state's housing opportunity gap. Over the years, expanded the capacity of BNT in response to community needs. Worked closely with diverse stakeholders and partners to ensure community support and engagement in the organization and its projects.

- Organization's assets grew from \$14,000 to \$40M. Increased annual operating budget from \$120,000 to \$5,000,000 and number of staff to from one to 26.
- Successfully raised diverse funding resources (at least \$750,000 annually) from HUD, EPA, LISC, Fairfield County Community Foundation, bank foundations, and private individuals.
- Managed all aspects of real estate development initiatives from conception to closings. Included completion of 250 units representing almost \$45M of community investment. Prior to leaving, established a pipeline of new real estate development: 4 major projects consisting of 155 units of new housing. In total these projects will result in \$34.5M of community investment.
- To ensure tenants were successful in housing, expanded BNT's programs to include the property management of 218 units across 25 buildings in Bridgeport. To maintain operational excellence and high-quality housing, established plan and benchmarks for each property and monitored closely using a customized dashboard to highlight areas of opportunity.
- Spearheaded a new healthy homes initiative with a focus on lead remediation. Worked in partnership with the City of Bridgeport Lead Free Families Program and HUD's LEAP to remediate 1,000 lead contaminated units managing more than \$9M of funding made available through HUD.
- Oversaw Homeownership Academy which includes pre-purchase education, foreclosure prevention and other wealth building services serving thousands of clients annually. Since the housing market collapse, 10 years ago, assisted 2500 clients achieve homeownership and 400 avoid foreclosure.
- Designed BNT's Social Enterprise Initiative and started three small businesses including a general construction firm, thrift store and laundromat and put a business plan in place to create a market/café.

Aug. 1995 - **The Community Builders, Inc., New Haven, CT**
 June - 2005 *Project Manager*

First hired as a receptionist in 1995, learned the business, earned multiple promotions and ultimately served the organization as a Project Manager. In this role, supported the redevelopment of 3 projects from concept through construction start consisting of 84 housing units. Managed over \$10M of public financing from multiple sources including Connecticut Housing Finance Authority, US Department of Housing and Urban Development Section 202 Program, Federal Home Loan Bank of Boston and City of New Haven HOME.

EDUCATION

Technical Training: Over twenty years, completed various trainings sponsored by National Development Council, LISC, NeighborWorks, and Connecticut Housing Coalition.

Gateway Technical Community College: *Business Administration*

National Youth Challenge Program: *Obtained General Equivalency Diploma 1995*

Programs and Certificates:

- [Community Leadership Program](#) (New Haven) 2017 - 2018
- Fairfield County's Community Foundation [Executive Leadership Program](#) 2014 – 2018
- Leadership Development Roundtable ([LDR](#)): 2008

RECENT ACTIVITIES and COMMUNITY LEADERSHIP

- Leviticus Fund, *2017 - Present*
- Bridgeport Regional Business Council, *2016 – 2018*
- Connecticut Housing Coalition, Board of Directors, *2013 – 2019*
- East End and South End Neighborhood Revitalization Zone, Board of Directors, *2010 - 2018*
- CT Trust for Historic Preservation, *2012 - 2014*
- Ten Year Plan to End Homelessness in Bridgeport, Co-chair Housing Committee, *2010 - 2014*
- CT Association of Nonprofits, *2012 – 2014*
- Vice President, New Haven Board of Education, Chairperson of the Administration and Finance Committee and Secretary of City-Wide Building Committee, *2009 – 2013*
- Other interests include: traveling, hiking the Appalachian Trail (1,000 miles so far) , and reading self-help books and memoirs

Reference Available Upon Request

Joshua Johnson

DIRECTOR OF OPERATIONS

Years of Professional Experience: 24

Education: Bachelors Degree in Industrial Technology,
Major: Construction Management – Central Connecticut
State University



SUMMARY

As Director of Operations, Josh holds ultimate accountability for client satisfaction at 7 Summits Construction. He oversees both preconstruction and construction services, making sure that both departments are adequately staffed, and our client's cost, schedule and quality needs are met. He works closely with the CEO and CFO, assuring that our financial objectives are achieved corporately and, on each project, and that high-quality staff members are hired to build out teams. He is a constant resource to these project teams, providing input and advice on all of 7 Summits projects from project set-up through closeout. He works with the Director of Business Development to make sure that opportunities align with internal resources and supports the business development effort with technical resources. In addition, he is responsible for hiring and onboarding new employees and maintaining appropriate technology for company and project efficiency.

PROFESSIONAL CERTIFICATIONS AND TRAINING

- Grace Works, Formal Presentation Training (2005)
- LEED Accredited Professional, U.S. Green Building Council (2009)
- Licensed CT Real Estate Agent (2023)
- OSHA 30

EXPERIENCE

- East Hartford Senior Center: Renovations & Site Development – East Hartford, CT, \$8M
- McClean Homes: Renovations of Assisted Living Facility – Simsbury, CT, \$2.4M
- Station Square: New 2-Building Retail/Residential Complex – Madison, CT, \$3.8M
- Common Ground High School: Construction and Sustainability Services – New Haven, CT, \$14M
- Carl M. Small VOAG Facility, Southington High School: Construction, Sitework and Utilities Services – Southington, CT, \$17M
- The Loomis Chaffee School – Windsor, CT
 - Campus Center & Dining Hall: Renovate Like New, Additions & Site Development – \$23M
 - NEO Theater & Arts Building: Renovate Like New, Additions & Site Development – \$9M
 - Palmer Hall Dormitory: Dormitory Renovations – \$6.5M
 - Promenade Restorations: Historic Masonry & Limestone Restoration – \$1.8M
 - Campus Way Project: Site Development, Roadway & Utilities – \$2.3M
 - Brush Library 1st Floor: Renovate Existing Library Space – \$250K
 - Brush Library 2nd & 3rd Floors: Renovate Existing Library Space – \$300K
 - Meadows Access Project: Site Development & Utilities – \$350K
 - Boys Baseball Dugouts: New Dugouts & Athletic Field Renovation – \$150K
 - Girls Softball Dugouts: New Dugouts & Athletic Field Renovation – \$175K
- CREC Reggio Magnet School: New School Facility & Site Development – Avon, CT, – \$23M



- Common Ground High School: New Academic Building & Site Improvements – New Haven, CT, \$14M
- DePaolo Middle School: Renovate Like New with Additions & Site Development – Southington, CT, \$40M
- Kennedy Middle School: Renovate Like New with Additions & Site Development – Southington, CT, \$40M
- Coleytown Elementary School: Renovations & Site Development – Westport, CT, \$27M
- New London High School: Renovate Like New with Additions & Site Development – New London, CT, \$80M
- ACES at Leeder Hill School: Renovate Like New with Additions & Site Development – Hamden, CT, \$41M
- Police Athletic League - Quirk Bldg, Hartford, CT: Renovations to Existing Community Facility – \$3.4M
- Wickham Library, East Hartford, CT: Renovations, Addition & Site Development – \$3.5M
- Community Health Center, Meriden CT: Renovations, Addition & Site Development – \$4.1M
- Wheeler Clinic, Plainville, CT: Renovations of Outpatient Medical Facility – \$750K
- JFK High School, Waterbury, CT: New Academic Building & Site Improvements – \$17M
- Columbus Elementary School, Bridgeport, CT: Academic Building Addition & Renovations – \$10M
- AF Barnum Academy, Bridgeport, CT: Academic Building Addition & Renovations – \$3.8M
- Southend Elementary, Southington, CT: New Academic Building & Site Development – \$13.5 Million
- Plantsville Elementary, Southington, CT: Renovate Like New Academic Building & Site Improvements – \$12M
- Ponus Ridge Middle School, Norwalk, CT: Extensive Renovations & Code Upgrades – \$6M
- Nathan Hale Middle School, Norwalk, CT: Extensive Renovations & Code Upgrades – \$7M
- Pepperidge Farms Inc, Norwalk, CT: Corporate Office Addition & Site Improvements – \$1.6M
- Church Hill & Queen LLC, Newtown, CT: New 3-Building Retail Complex – \$3M
- Residential Recycling Facility, New Britain, CT: New Recycling Facility & Site Development – \$1.5M
- Physical Services Plant, Wethersfield, CT: Renovate Existing Office & Shop Space – \$500k
- Carl M. Small VOAG Facility, Southington, CT: New Academic Building & Site Improvements – \$17M
- Silas Deane Middle School, Wethersfield, CT: Renovate Like New with Additions & Site Development – \$21M
- Stillman Board of Ed Building, Wethersfield, CT: Renovate Like New Office Space & Site Improvements – \$8M
- Webb Elementary School, Wethersfield, CT: Renovations & Site Improvements – \$4.8M
- AAA CT Motor club, Danbury, CT: New Office Building & Site Development – \$8M
- Greater Hartford Jaycees Boathouse, Hartford, CT: New Boathouse on CT River & Site Development – \$12M

Daniel Paquette

ESTIMATOR

Years of Professional Experience: 37

Education: Bachelor of Science in Civil Engineering,
Northeastern University

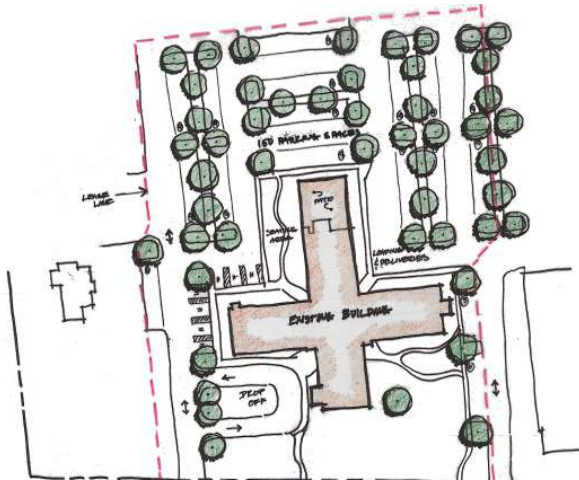


SUMMARY

Mr. Paquette is a seasoned construction management professional with 37 years of experience, leading numerous high-profile projects to successful completion. His effective management and strategic oversight have consistently delivered projects on time and within budget, enhancing his reputation as a trusted leader in the industry.

EXPERIENCE

- City of Hartford: "Albany & Woodland Place" Mixed-Use Development – 80,000 sf, 50 residential units, office and retail space, Hartford, Connecticut
- Hartford School Building Committee: Renovation-as-New, Dr. Martin Luther King, Jr., High School Campus Improvements – Hartford, CT, \$86.5M
- Burns Latino Studies Academy: Preconstruction Services – Hartford, CT (2022), \$47 Million
- Grace Academy School, Hartford, CT (Projects in 2017 and 2020): Construction Estimation Services – Hartford, CT
- Blue Hills Recreation Center (June 2023 - Present): Construction Estimation, Lump Sum Bid, and Project Management Services – Hartford, CT, \$1.74 Million
- New South Hartford Boys & Girls Club: Cost Estimation, Budget Planning for New Construction – Hartford, CT (2021), \$15 Million
- Blue Hills Civic Association: Office Renovation and Addition (Redevelopment of 410 Homestead Avenue) – Hartford, CT
- City of Hartford: Fire House No.2 – Structural Repairs – Hartford, CT
- City of Hartford: "Park and Main" Mixed-Use Development – Hartford, CT
- City of Hartford: "Albany & Woodland Place" Mixed-Use Development – Hartford, CT
- Urban League of Greater Hartford: 140 Woodland Street Office Building Improvements – Hartford, CT
- The Children's Museum, Relocation – West Hartford, CT
- Town of Cromwell: Construction Oversight Services as Clerk of the Works for the Renovation and Expansion of the Belden Public Library – Cromwell, CT
- Town of Cromwell: Construction Oversight Services as Clerk of the Works for the New Design-Build Public Works Garage and WPCF Offices – Cromwell, CT



7Summits Realty is a full-service real estate firm providing comprehensive property solutions for residential, commercial, and investment clients. As the sister company to 7 Summits Construction, a trusted Hartford-based construction firm, we offer a unique blend of real estate expertise combined with construction knowledge. This partnership allows us to provide a 360-degree approach, from property acquisition through development and management.

We are committed to delivering excellence in every interaction. Guided by the core values of transparency, integrity, and teamwork, we prioritize building trusted relationships with our clients. Whether you are buying, selling, or investing, our experienced team delivers personalized strategies to meet your specific goals.

At 7Summits Realty, we leverage our deep market insights and close collaboration with 7 Summits Construction to provide tailored real estate solutions that fit your needs. Whether you're exploring opportunities for development or looking for the perfect property, we are here to guide you every step of the way.

Rohan A. Freeman, PE, LS

President

(860) 756-5577 | rffreeman@7summitscc.com



36, John Street, Hartford, CT



info@7summitscc.com

7 Summits Realty, LLC

Completed Development Projects



“Park and Main” Mixed-Use Residential Development, Hartford

Located at the northwest and southwest corners of the highly visible Park Street and Main Street intersection, the project involves the redevelopment of 2 parcels, designated as A and B, representing approximately 11.8 acres in the City's South Green Neighborhood. Parcel A consisted of four vacant properties totaling 1.652 acres, is within two zoning districts, the MS-1 and DT-3 zones, and benefits from frontage along Main Street, Park Street and John Street and is adjacent to, but not within, the South Green National Historic District. The topography of the site is flat and a utility easement traverses the properties from John Street to Main Street. Parcel B consisted of nine vacant properties totaling 0.604 acres, and is within one zoning district, the MS-1 zone. These parcels are important to achieve the objectives of the redevelopment and are a catalytic development opportunity to facilitate additional future investments while anchoring the local neighborhoods. Site and architectural design focus on

a mixed-use development scenario, with active street uses on the ground floors and office or residential space above. The use program is mixed use with the intent to place “feet-on-the-street” and increase activity in the area. Residential use is also included with density and style shaped not only by zoning, but also market demands, financing requirements and pro-forma. Park and Main's architectural styles, features, and site design are influenced by the City's new form-based zoning code, as well as the neighborhood's historic context. The code emphasizes high-quality design and materials, with buildings located along the street lines to reinforce established building walls and contribute to the overall streetscape. Mr. Freeman acted as Co-Developer on this project with Spinnaker Real Estate Partners. The development was funded by \$16 million in bank financing and \$8.4 million in loans from the quasi-public Capital Region Development Authority (CRDA). Other financing involved \$1.6 million in equity and a deferred \$900,000 developer fee.

Freeman Companies, 7 Summits Construction and 7 Summits Realty Office, Hartford

On the occasion of its fifth anniversary in 2014, Freeman Companies, and “sister companies” 7 Summits Construction and 7 Summits Realty moved to a new, permanent office location in the South Green neighborhood of Hartford – at 36 John Street. 36 John Street was designed by renowned Hartford architects Whiton & McMahon in 1920. Beginning its useful life as the Fire Department's original Equipment Maintenance Shop, the facility served the HFD until its obsolescence in the 1980s when it was shuttered.

In 1989, 36 John Street – and its neighbor Engine Company 1 at 197 Main Street – were both placed on the National Register of Historic Places “for their high levels of integrity of design, materials, setting and associated historic context with the Hartford Fire Department”. Prior to the company relocation, the building served for over a decade as the studio and residence of Linda Cheverton Wick and Walter Wick, creators of the popular iSpy “Can You See What I See?” book series. 7 Summits' alterations to the historic building have a light touch, retaining the unique architectural characteristics of the distinguished Neo-Classical, stone-trimmed brick façade and spacious, open-plan interior. Building area totals 12,168 square feet and accommodates sixty employees.



16 Cedar Street, Multi-Unit Housing Development

Norwich, Connecticut



Years Services Provided: 2022-Present

Project Owner: 16 Cedar Street, LLC

Services: Civil Engineering, Landscape Architecture, Land Surveying, Environmental Sciences, Traffic Engineering

This project in Norwich, CT is a new multi-unit residential workforce and affordable housing development situated within a National Register Historic District. The rich history and background of this property and surrounding area encompasses historic events including the Underground Railroad, Prudence Crandall's School, the prominent journalist for black and mainstream publications James Spelman, and anti-slavery efforts. The site was thoughtfully planned to be sensitive to historic and archaeological features and respond to reducing impacts upon the surrounding residential neighborhood. The previous details of the site at 16 Cedar Street extend back to the 1830s when it was the former location of the Norwich Jail that was later demolished in the 1950s.



The proposed development includes high-rise multi-family housing consisting of one four-story building with 27 units and associated improvements to the site and proposed buildings including: drainage, parking lot, landscape, and recreation space. Site work for this property required the removal of some existing walls from the structural remains of the former jail. Survey was conducted to identify significant buried archaeological resources related to the former jail and archaeological resources associated with the former Spelman house in the development area so they can be avoided or mitigated prior to construction.

Our sister company, Freeman Companies provided Land Surveying, Civil Engineering, Landscape Architecture, Traffic Engineering, and Environmental Sciences for this project. Our team's responsibilities for this project included: Phase I ESA, Traffic Analysis, Preliminary Investigation, Design Development Phase, Permitting, Construction Documents, Bidding Assistance, Construction Administration, and supplemental services.

Feldspar Ridge Housing Subdivision

Glastonbury, Connecticut



Years Services Provided: 2022-Present

Project Owner: Feldspar, LLC

Client: Feldspar, LLC

Services: Land Surveying, Civil Engineering, Landscape Architecture, Environmental Sciences

Prime or Sub: Prime

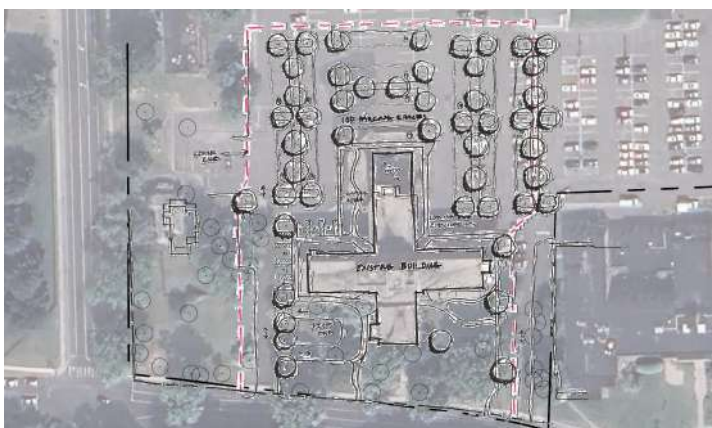
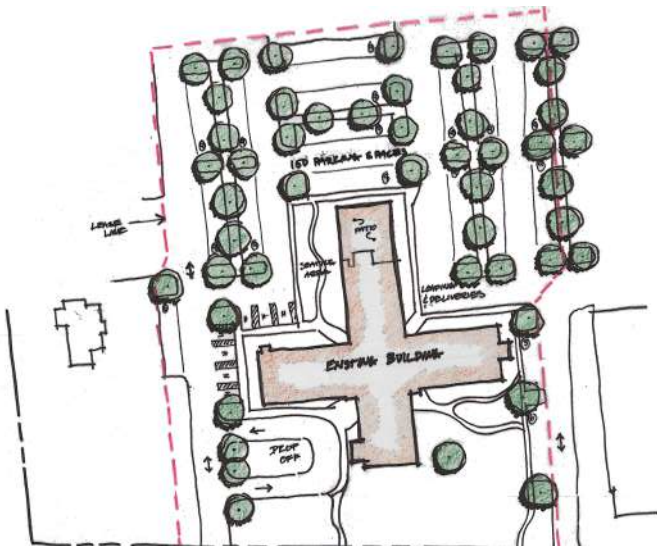
This project consists of the construction of over 100 new residential units with 20% of these units being made into affordable housing. The site is approximately 25 acres of land and located south of Uplands Way and Feldspar Ridge off the New London Turnpike in Glastonbury, Connecticut. The site had previously been used extensively as a fruit orchard so it was determined that the site soil likely was contaminated and impacted by pesticides and metals including lead and arsenic. A preliminary investigation and concept plans study was proposed since this site was being made into residential developments.

Our sister company, Freeman Companies is providing Land Surveying, Civil Engineering, Landscape Architecture, and Environmental Sciences services for the Feldspar Ridge Housing Development in Glastonbury, Connecticut. Our Environmental Sciences team performed soil sampling to assess the vertical distribution of metals and pesticides on the subject site. This sampling was collected and analyzed for total lead, total arsenic, and organochlorine pesticides at a state certified laboratory. Our Site Design team preliminary investigation includes a site visit, conceptual site plan, zoning, and utility investigation.



Holcomb Redevelopment

Hartford, Connecticut



Years Services Provided: December 2023-Present

Project Owner: City of Hartford

Client: City of Hartford

Services: Redevelopment and adaptive reuse of 2 Holcomb Street, including design, engineering, and construction management

Prime or Sub: Prime

The Holcomb Street Redevelopment project focuses on the redevelopment and adaptive reuse of the Holcomb Street property in the City of Hartford. This project will reconstruct the historic property to fit within the city's infrastructure, economic development, and quality-of-life goals. The proposed development includes design, engineering, and construction management services. 7 Summits Realty, LLC is leading this project as a prime developer, leveraging their extensive experience in adaptive reuse and community revitalization within the City of Hartford.

The scope of services provided by 7 Summits Realty includes developing a preliminary adaptive reuse plan, financial feasibility, project scheduling, and a disposition proposal for the site. In addition, the project will include public benefits such as job creation and community engagement.

Reference:

Mr. William Diaz

City of Hartford

Department of Development Services

260 Constitutional Plaza – 1st Floor

Hartford, Connecticut 06103





HousingSmarts

RAISING THE ROOF

PROJECTS IN CONSTRUCTION

Arrowhead Café and Beyond: The Arrowhead Café and Beyond Project will consist of the renovation of 45 units of housing and approximately 13,000 sq. ft. of ground floor retail space in 3 buildings situated within the Downtown North National Historic District, adjacent to the Dunkin Donuts Stadium, Keney Memorial Clock Tower and immediately north of I-84. The construction of I-84 cut off the North End from Downtown, creating radical economic, social, and demographic changes, and perpetuating inequity that still persists today. The parcels are made up of two vacant mixed-use buildings, one 6 unit occupied building, vacant lots fronting Main Street and Ann Uccello Street, and the Ann Uccello Street, itself. The properties include:



Rendering of proposed Arrowhead Café and Flatiron Building

- ✓ 1355 Main Street has been vacant for several years and was once home to the Arrowhead Cafe. The Italianate-style building is 4 stories high, 5 bays wide, and 4 bays deep with a flat roof. Its last uses were a restaurant on the first floor and living units, with shared bathrooms down the hall, on the second, third, and fourth floors.
- ✓ 529 Ann Uccello Street is known as the Comstock Building, after Frederick R. Comstock, its architect. It is also known as the Flatiron Building. Standing four stories, it was constructed in 1896 in a Neo-Classical Revival style. It was damaged by a fire in 2004.
- ✓ 506 Ann Uccello Street was constructed in 1890. It is a 2-story brick Queen Anne cross-shaped double house with truncated hipped roof.

In collaboration with the City of Hartford and co-developers, San Juan Center and Carabetta Development LLC, HousingSmarts has supported the redevelopment of the Arrowhead Cafe and the adjacent parcels since 2021. The partnership has made great strides in the redevelopment of this project which includes:

- ✓ Design and Engineering Plan
- ✓ Environmental Assessments and Remediation Plan
- ✓ Planning and Zoning Approvals
- ✓ Local Historic Commission Approvals
- ✓ State of CT, SHPO Approval of both Part 1 and Part 2 for all three buildings
- ✓ National Park Service Approval for all three buildings

- ✓ Financing Commitments from Liberty Bank, CRDA, State of CT, DECD, City of Hartford, and investors

The total development costs of the project will be \$19 million. This project is currently in construction.

Wellington at Madison: Wellington at Madison is a 31-unit multi-family development led by co-developers, The Caleb Foundation and HOPE Partnership. Located in Madison, CT, this mixed income development will provide high quality, newly constructed rental housing to families with a range of incomes up to 60% of AMI in a high opportunity area. This development seeks to create a neighborhood feel for families by utilizing its current barn and developing condominium-style buildings clustered throughout the site and adjoined by walking paths.

The project site for development is located at 131 Cottage Road Madison, Connecticut off of Route 1, and close to I 95. This property currently includes four completed and occupied rental units in one structure, a vacant, partially renovated historic farmhouse/ barn, and a completed foundation for a 3-unit structure.

The location of the site is within walking distance (.5 miles) to public transit and Madison commercial district, which includes a grocery store and other neighborhood amenities. The site is near the coast and the Connecticut River. It is near opportunities for open space and recreation, as well as Madison's historic art district for cultural opportunities. The site is in close proximity to Hammonasset Beach State Park, Town Center, train station, Clinton Crossing, and Salt Meadow Park.



Rendering of proposed Wellington at Madison

HousingSmarts has been instrumental in the pre-development planning activities of this extensive project. These activities include:

- ✓ Obtaining pre-development funding to support the costs associated with early development activities.
- ✓ Assist in the selection and contracting of all project professionals required to complete the project such as an architect, engineer, environmental testing firm, surveyor, attorney and general contractor.
- ✓ Determine the scope of the project, estimated costs and timing of the work proposed for the project in conjunction with project professionals.

The total development costs of the project will be approximately \$7 million and funded by the Connecticut Housing Finance Authority using Low Income Housing Tax Credits and

Housing Tax Credit Contribution Program, the State of Connecticut, Department of Housing and Federal Home Loan Bank of Boston. This project is nearly complete. Lease-up will take place mid-October.

The Towers at Tower Lane: The Towers at Tower Lane has been the main home for Greater New Haven's low-income minority seniors since 1971, when it opened its doors. At any given time, it houses approximately 328 older adults. The average age in our community is 83 and the average annual income falls between \$15,000 and \$20,000. 70% of our population requires assistance with acts of daily living and 75% of our population is subsidized. While the two buildings that make up the Towers have been very well maintained, they have not had major renovation in over 30 years.



Rendering of proposed Towers at Tower Lane

Due to this, many of the mechanical systems began to fall and space that no longer met the current need and emerging need of generations of seniors. The three critical components of the renovation projects are: 1) Renovation of 15 existing housing units. 2) Address major building systems, i.e. energy efficiency, surveillance, elevator, fire suppression and other mechanical systems that have reached stage of life so we may continue to provide decent, safe, and affordable housing. 3) Reimagine the 30,000 sq. ft. of ground floor common area and program spaces, making them reflective of the population being served and its shifting and growing needs. This transformation will allow the Tower residents to age in place more successfully with services and spaces that match their current and future needs.

The total development costs of the project will be approximately \$30 million and is funded by the State of CT, Department of Housing and private grants. The second phase is currently under renovation.

COMPLETED PROJECTS

East End Scattered Sites: Restoration of 5 scattered throughout the neighborhood including: 84 Holly Street, 1998 Seaview Avenue, 1534 Seaview, 1755 Stratford Avenue and 1841 Stratford Avenue totaling 33 units.

All units were renovated to “like new” condition, replacement of damaged GWB ceilings and walls, new bathrooms, new kitchens, new flooring in the sleeping, dining, kitchen and living rooms, ceramic tile (walls and floors) in bathroom. New windows and entry doors were required. Furnaces, Hot Water Heater and baseboard heaters will be replaced. New roof and electrical upgraded to meet code.

The total development costs exceeded \$6,000,000 which was funding by the State of Connecticut, Department of Housing, Connecticut Housing Finance Authority HTCC, and Capital for Change. All units were completed by 2022.





273-301 West Avenue: This newly constructed townhouse style building is a gem. It includes 18 resident units. The total development costs of the project is approximately \$4.4M. Funding was provided by the State of CT Department of Housing, Federal Home Loan Bank of Boston, People's United Bank. The building itself is a 3-story wood stud framed structure constructed of stone tiles, fiber cement siding and trim in a townhouse-over-flat configuration and includes 21 parking spaces with a total project square footage of 20,000 sq ft. In an effort to reduce the pervious surfaces, permeable pavers were used in a portion of the parking and walking areas.

Additionally, to eliminate run-off, the project features a natural rain garden to hold and treat storm water. All building materials were purchased from regional manufacturers/suppliers.

The proposed development provides newer units with modern amenities and an established rent structure that is affordable to residents so that they are paying approximately 30% of their income. Located adjacent to Downtown Bridgeport, this location is highly marketable to individuals and families that are looking for urban living with proximity to the greater Bridgeport region and lower Fairfield County. This project was completed February 2021.

515 West Avenue: Newly constructed five-story building at 515 West Avenue consisting of 48 apartments and two small ground floor retails spaces on the western edge of Downtown Bridgeport, a block away from Gateway 570. Housing for residents that need it most, including very low-income families and homeless veterans, in a walkable, transit-oriented neighborhood. Support services will be provided by Operation Hope.

The total development cost exceeded \$12 million funded by the Low-Income Housing Tax Credit Program administered by the Connecticut Housing Finance Authority (CHFA), State of Connecticut Bond Funds, City of Bridgeport HOME funds and private financing provided by Citibank and the Community Capital Fund. The project was completed in 2018.



Milestone Apartments: Assembled four vacant lots, with a full block of street frontage on Stratford Avenue, lying between

Freeman Street and Bishop Avenue. This new construction mixed-use, integrated permanent supportive affordable housing development targeting adults with special needs, specifically Veterans, and provides 30 one bedroom units. In addition, this building provides 9,000 sq. ft of commercial space which is home to a new early learning center operated by ABCD.

Unlike typical affordable housing, the East End Project combines supportive affordable housing units with market rate housing targeting adults with special needs. 20 units are reserved for individuals earning less than 50% of AMI occupants, of which 8 are for veterans ineligible for VASH and 7 for the chronically homeless or at risk of being homeless population. 10 units are reserved for individuals earning less than 80% of AMI occupants.

The building consists of a three-story building with 30 one-bedroom units, commercial space on the first floor and community, common and management space on the first and second floors. The total gross square footage of the building is 41,496 with approximately 9,000 square feet designated as commercial leasable space and each upper floor (2nd and 3rd) consist of 14,335 square feet on each floor. Each residential unit is approximately 800 square feet which consists of one bedroom, kitchen, living room and a full bath. All housing units are handicap adaptable and 3 units are fit up to be fully accessible. The site consists of four contiguous parcels which extend along Stratford Avenue from Freeman Street to Bishop Avenue making up the entire frontage of the block on Stratford Avenue. The site is completely vacant with direct access to all utilities along Stratford Avenue. The construction of this development was completed in December 2016.

The total development cost exceeded \$9 million funded by the State of Connecticut Bond Funds and City of Bridgeport HOME funds. The project was completed in 2018.



Gateway at 570: 30 one-bedroom unit, mixed use building in Downtown Bridgeport completed on May 2014. The total development cost was approximately \$7.2 million funded by the Connecticut Housing Finance Authority (CHFA) on funding provided by the Interagency Committee for Supportive Housing to construct a building on 570 State Street, Bridgeport, CT. The Interagency Committee for Supportive Housing includes the State of Connecticut Office of Policy and Management, CHFA, State of Connecticut Judicial Branch, Department of Children and Families, Department of Correction, Department of Economic and Community Development, Department of Mental Health and Services and Department of Social Services.

The ground floor is home to Bridgeport Neighborhood Trust corporate office. The building consists of 7 units specifically for young people transitioning out of DCF custody, 3 for the at risk of being homeless population, 10 affordable and 10 market rate. The building has an elevator and designed to accommodate physically challenged people. The apartments vary in sizes from 600 sq. ft. – 700 sq. ft. Supportive services is provided by Operation Hope. This project was completed in 2015.



Sheldon Oak

RELEVANT PROJECT EXPERIENCE

MARTIN LUTHER KING APARTMENTS



SOC partnered with Vesta Corporation to redevelop MLK Apartments, a 1960's 64-unit public housing-style townhouse community in Hartford's Sheldon /Charter Oak Neighborhood. The joint venture has secured financing to demolish the buildings and replace them with 155 modern, energy-efficient townhouses and an elevator building to allow long-time residents to age in place. Families were temporarily relocated and will be offered the opportunity to return when construction is completed in 2026.

BACON CONGREGATE



SOC converted the historic Bacon Bottling Factory into 23 units of congregate housing for low-income elderly. Residents live in comfortable, one-bedroom apartments and are provided with social and recreational services by a full-time on-site staff. The site is conveniently located within walking distance of public transportation, the Hartford Hospital campus, and the Park Street retail corridor. SOC is undertaking a major renovation of the building systems and unit interiors in late 2024.

PHILLIPS METROPOLITAN APARTMENTS



In honor of Ida B. Wells

In collaboration with the social services arm of Phillips Metropolitan CME Church, **SOC** acquired a vacant lot in Hartford's North End that was adjacent to a senior center and secured financing to build 40 units of affordable housing for low-income seniors, known as Ida B. Wells Apartments.



SHELDON OAK
A Non-Profit Housing Development Corporation

Sheldon Oak

RELEVANT PROJECT EXPERIENCE

RICE HEIGHTS



SOC partnered with Habitat for Humanity to build 44 single family homes on the site of the demolished Rice Heights public housing project in Hartford's Southwest neighborhood. SOC worked with the relocated tenants on credit repair and homeownership to prepare those who wished to purchase the homes.

4-40 VINE STREET HOUSING



SOC acquired nine historic buildings on Vine Street in Hartford and worked with the community to develop plans to rehabilitate the buildings into 74 spacious amenity-rich apartments, including 23 units set aside for low-income seniors. What was a blighted and semi-abandoned block is now a fully occupied and thriving mixed-income rental community.

NORTHEAST HARTFORD AFFORDABLE HOUSING



In the 2000's, **SOC** created Northeast Hartford Affordable Housing (NHAH), a seven-building, 68-unit scattered site development of small apartment buildings and townhouses. NHAH includes a neighborhood resource center and management office at 127 Martin Street.

SOC is currently refinancing and restructuring its properties in Northeast Hartford, including NHAH, and two other buildings into one 78-unit tax credit-financed development, with construction scheduled to begin in Summer 2024.



SHELDON OAK
A Non-Profit Housing Development Corporation

CENTER VILLAGE SENIOR AFFORDABLE HOUSING

Glastonbury, Connecticut



COST: \$17.7 million

COMPLETION: 2018

This 74-unit residential community in Glastonbury Center is helping the town achieve its housing diversity goals and filling a big gap in Glastonbury's affordable housing stock.

The new 38-unit, two-story building was constructed on a prominent corner in Glastonbury. The project also included the renovation and expansion of 34 units within six buildings dating back to 1975. The units were expanded from 350 to 650-SF.

The project has changed the look of Center Village, helps it fit in more with the downtown center, and brings a more modern affordable housing program to the Glastonbury community.

ESSEX PLACE

SENIOR AFFORDABLE HOUSING

Essex, Connecticut



COST: \$6.4 million

COMPLETION: July 2017

After seven years of planning, design, and construction, Essex Place, a senior and affordable housing development in Centerbrook, celebrated its grand opening in July 2017.

Essex Place provides 18 one-bedroom apartments and 4 two-bedroom apartments. Three of the units are fully handicap-accessible and the other units may be adapted for handicapped tenants. All the doors are sized to accommodate wheelchairs, and handrails line the walls in the hallways.

The complex has a community room on the first floor, as well as a library and kitchen on the second floor. Each apartment also has an individual kitchen. Other groups within Essex are welcome to reserve the community room for use.

The project is a collaboration between Essex Elderly and Affordable Housing (EEAH) and the Women's Institute for Housing and Development (WIHD). Funding for the project came from about 10 different sources, including the Connecticut Department of Housing and the Connecticut Housing Authority.

ALFRED E. PLANT SENIOR AFFORDABLE HOUSING

West Hartford, Connecticut



COST: \$16 million

COMPLETION: 2012

The 42 new units at the Alfred E. Plant Housing Complex broaden the town of West Hartford's ability to meet the regional need for affordable elderly housing.

A three-story, 30,000-SF building, the structure provides a new image for the facility. The new units are a mix of affordable and market rate elderly units, offer open-plan living, and some are handicap accessible. The existing 95 unit renovations include upgraded bathrooms, finishes, and ADA accessibility. Outdoor site upgrades include a measured walking path and cultivated lawn for recreation and entertainment. Energy efficiency was increased by replacing the existing exterior window system and inefficient boilers.

The driving force behind the project was the housing authority's desire to take control of the property. The design and development team worked with the Owner to file the demolition/disposition of the units from HUD control, and worked with CHFA to acquire funding.

JACK'S FARM

AFFORDABLE HOUSING

Cheshire, Connecticut



COST: \$12 million

COMPLETION: Spring 2026

Jack's Farm in Cheshire, Connecticut is an affordable housing project featuring 45 units of studios, one, two and three-bedroom options. Of the four buildings on the property, one of them will be the community center which will feature administration office space and a residential lounge.

The conceptual / schematic design phase is complete and funding is in place for the new construction of this 52,000-SF barn and farmhouse-style residential living estimated to be completed in the Spring of 2026.

DeMarco Management Corporation Overview

DeMarco Management Corporation is a full-service residential and commercial property management company. The company was formed in 1993 by Maria DeMarco and Rose Miles and is designated as a Woman Owned Business Enterprise.

CORPORATE HEADQUARTERS

Our corporate headquarters are located at 117 Murphy Road, Hartford, CT 06114. We also maintain satellite offices in Middletown and several other locations throughout the state.

ORGANIZATIONAL COMMITMENT

We have a strong commitment to providing quality service to our clients. Teamwork and partnership best describe our interaction with owners, vendors, and funders to coordinate the most appropriate combination of quality and cost in the delivery of our services. It is our goal to thoroughly understand the immediate and strategic needs of our clients as well as the communities they service and support.

CORPORATE PHILOSOPHY

DeMarco Management Corporation is a full-service property management company employing 116 Connecticut Residents. We specialize in managing facilities for municipalities, the State of Connecticut, not-for-profit businesses, and publicly traded corporations. We are committed to providing superior service utilizing our most valuable resources- our people.

Our services are extremely comprehensive, thereby allowing you; our client, to concentrate on your business. We handle all the details and present you with options and suggestions so that you can make informed decisions. We accomplish this strategy by becoming intimately involved in all aspects of your facility by gaining a sound working knowledge of your operations, tenant's needs, your staffing plans, policies and regulations. Adhering to this philosophy creates an environment whereby DeMarco Management Corporation staff is an extension of your staff.

BACKGROUND AND EXPERIENCE

DeMarco Management Corporation is a full-service residential and commercial property management company. Ms. DeMarco formed the company in 1993, which has seen steady and continued growth since its inception. DeMarco Management Corporation has a wealth of experience providing property services to residential and commercial property owners throughout the State of Connecticut. DeMarco Management Corporation's services include residential apartment communities, co-ops, condominiums, mixed use, commercial office and retail. We have significant experience with Federal, State and local agencies including CHFA, DOH, HUD, FHLB and local and municipal housing authorities.

Our firm is known for its retention of properties through proactive measures that minimize the escalation of expenditures even during times of inflation and skyrocketing costs associated with liability insurance, de-regulation of utilities, increased costs associated with employee fringe benefits, and increases associated with contracted services. DeMarco Management Corporation has a strong commitment to providing not only quality service but also timely and customer-friendly service. Teamwork and partnership clearly depict how DeMarco Management Corporation employees interact with owners, tenants and vendors to coordinate the most appropriate combination of quality and cost-effective services. It is our goal to understand the immediate and strategic needs of our clients, as well as that of the community.

HOUSING PORTFOLIO

As reflected in the enclosed Portfolio listing, we currently manage 57 housing communities throughout the State of Connecticut with a total of 2545 residential units. Within our Portfolio, 25 of these communities are HUD Funded developments which includes of 794 units. Our entire housing Portfolio consists of HUD funded PRAC 811, PRAC 202 and Multi-Family housing; Low Income Housing Tax Credit; Congregate, Supportive, Affordable Housing, Co-operative and individual unit ownership. (*See attached Exhibit A: DeMarco Management Property and Client Listing*).

We manage the portfolios of the following Municipal Housing Authorities: Essex, Berlin, Bridgeport, Plymouth (financial operations only), Cheshire, Manchester, Shelton, Windsor, and Windsor Locks. These properties were developed with multiple funding resources which include CHFA Tax Credits, DOH, State E-Rap and ACC subsidy and are comprised of a mix of Elderly, Disabled and Family properties.

We work with several non-profit agencies that develop subsidized housing. The bulk of our residential portfolio consists of State and Federal funded housing, including mixed income, family, elderly, supportive, congregate and low-income housing tax credit projects. In addition, we manage several market rate developments and subsidized housing owned by for profit corporations, which gives us a solid benchmark in the industry to make sure we remain competitive and progressive for our owners and residents.

DeMarco Management Corporation has been in the business of managing affordable housing communities for over twenty years. As Managing Agent, we are familiar with all rules, regulations, and applicable state and federal laws of managing affordable housing sites. We follow all rules and regulations of HUD, CHFA, DOH, and Section 42 governing the managing of Low-Income Housing Tax Credit affordable housing.

SENIOR MANAGEMENT STAFF

The Senior Management Team consists of excellent trained professionals who bring a wealth of knowledge in the real estate management, property management, and financial management. The blending of all these resources not only brings a willing and energetic team, but one that provides state of the art property management services designed to address the unique needs of each client. DeMarco Management Corporation's management team is comprised of individuals with

a firm belief and commitment to teamwork. The management team includes the following individuals:

Maria DeMarco formed DeMarco Management Corporation in 1993 and is the President of the Corporation. Maria has over thirty years of facilities management experience supporting a major financial institution with a focus on property, construction, capital improvements, leasing and building operations as well as management functions. Maria specializes in setting the company's strategic direction; marketing our services to new clients and ensuring that our current client's retention goals are achieved.

Matthew Fontaine serves as Controller for DeMarco Management Corporation. Matthew oversees the financial reporting requirements for our clients. Matthew has a great deal of experience as a Financial Analyst, Senior Auditor and Controller. In addition, Matthew is also a Certified Public Accountant.

Sherrie Garner is the Vice President of Operations for DeMarco Management Corporation. Sherrie has close to 20 years affordable housing experience and provides day to day operational oversight of all property management functions. Sherrie works with both the Property Management and Compliance Departments in setting up management controls for all our properties as well as with new business development. Sherrie has significant experience in the property management field and has extensive knowledge in affordable housing funded by various government agencies.

Paul Cote joined DeMarco Management in 2018 and serves as Director of Facilities. In this role, Paul our Property Maintenance staff and personnel. Paul has experience with managing the State of Connecticut properties and private owner properties. Paul's portfolio includes several major DeMarco Management Corporation commercial accounts including Trinity College, United Way and the People's Bank assignments. Paul is instrumental in overseeing major construction or renovation projects.

PROPERTY MANAGEMENT

DeMarco Management Corporation believes that the strength of its operation is at the site level, which is evidenced by its commitment to a decentralized approach to property management, wherein the primary focus is on the delivery of services at the site level. Supervisory staff spends more time "in the field" than in the main office to ensure that systems and procedures are carried out effectively and efficiently at the site level. On site personnel will be supported by the Compliance and Human Resources Departments located at DeMarco Management's corporate office located in Hartford, CT. Human Resource is responsible for all hiring of new personnel to staff the site Development.

Our property management team is comprised of Regional Property Managers, on-site Property Managers, Maintenance Technicians and when applicable a Resident Services Coordinator. Property managers are experienced and well trained in all aspects of day-to-day property management. They may be responsible for one large property or for two to four smaller properties administered by on-site Property Managers. Our Property Managers provide daily supervision and support where it is most needed—at the site level.

DeMarco Management Corporation prepares a staffing plan for each property it manages that optimizes the delivery of management services within the constraints of the property's operating budget. We routinely recruit and extend employment opportunities to neighborhood residents in the communities where we provide management services. It is advantageous to have staff that live close to the properties for a variety of reasons, including their ability to respond to off-hour emergencies quickly, their knowledge of the community and its residents, services, vendors, etc., and their acceptance by residents

Our key staffing roles consists of a fully staffed Property Management department accountable to maximize occupancy levels and property values with solid performance in the basics of property management services. These include, coordinating maintenance services, accounting and record keeping, resident selection, responses to resident requests, rent collection and eviction policies and procedures, regulatory compliance, managing operating budgets, and dispute resolution.

To provide maximum technical and supervisory support, each property is assigned a Regional Property Manager who works under the supervision of the Vice President of Operations. The Regional Property Manager communicates directly with the owner about policy issues and keeps the owner apprised of both the fiscal and physical health of the property. A Regional Property Manager's role is critical in satisfying the DeMarco Management Corporation's contractual obligations to provide property management services at all properties. While supervising the Property Manager, the Regional Manager plans, directs, and coordinates the leasing, remains up to date with all state and federal housing regulatory changes and governance activities of commercial, industrial or residential real estate properties.

Our management team completes an intensive training program in all aspects of property management including physical plant, resident relations, property accounting, budgeting, legal and agency regulations. A key to our commitment of service is ongoing education that includes Fair Housing Training, State and Federal regulatory training and certifications, and Safe Work Practice workshops. The management staff is supported by an Accounting Manager, the Compliance Department which provides ongoing compliance training and support for site staff in various monitoring programs and report, and our IT department which provides both hardware and software support for all computers and phones as well as a file back-up service for redundancy and to eliminate any disruptions on the site due to electronic equipment.

RESOURCE MANAGEMENT

- **Emergency Services:** Our firm provides 24-hour emergency services as a matter of course. This immediate response time includes first level of response to off-hour emergencies. All our lead personnel carry cell phones and are expected to respond to off-hour situations. We also maintain a network of third-party vendors who will respond to off-hour emergencies as well. These vendors provide a working relationship with DeMarco Management Corporation that ensures emergency requests are handled quickly and efficiently.
- **Snow Removal and Landscape Maintenance:** DeMarco Management Corporation will prepare seasonal specifications, identify quality vendors and oversee the standard bidding process to ensure that client requirements and needs are met and satisfied. There will be no DeMarco Management Corporation mark-ups for contacted services.
- **Trash Removal and Recycling:** We will match the client's anticipated trash and recycling needs with the proper program data and prepare specifications for bidding, conduct formal bid process and implement a process that meets the client's and States requirements.
- **Security:** Whether on-site security personnel or remote security monitoring is required, DeMarco Management Corporation will define the need, develop security options and implement appropriate security measures to meet the client's expressed requirements.
- **Environmentally Responsible Management:** DeMarco Management Corporation is dedicated to creating healthier environments in which to live. In order to create cleaner, healthier environments within the living and working spaces for residents as well as energy efficiency in the building systems, we have designed "green" procedures of property management for our properties. Such procedures include:

Energy use and efficiency
Green materials and practices
Promoting resident awareness

Lighting systems
HVAC maintenance practices
Preventative Maintenance

CONTROL BUILDING OPERATON EXPENSES

DeMarco Management Corporation works to minimize building operating costs subject to the appropriate level of services as determined by the client. Areas of focus include:

- Evaluating the service level expectations of the client and tenants.
- Maintaining service response levels on a timely and effective basis.
- Auditing of service contacts and benchmarking analyses to evaluate vendor costs and performance.
- Maintaining high satisfaction levels through client/tenant surveys.
- Evaluating allocated staffing levels.
- Evaluating energy consumption and energy management systems.

- Evaluating budgets by line item.
- Maintaining and enhancing customer service.
- Preserving a work environment that is functional and attractive.

SERVICES & HOUSING EXPERIENCE

- | | |
|----------------------------------------|----------------------------|
| - Housing Authorities | - State of Connecticut DOH |
| - HUD Section 202 | - Cooperatives |
| - Rural Development Section 515 | - Multi- Family |
| - HUD Section 811 | - Condominiums |
| - HUD Project Based | - Renovations |
| - CHFA Next Steps & Supportive Housing | - Relocations |
| - CHFA Financed | - Property Reorganization |
| - HUD Section 8 | - Project Management |
| - State Congregate Facilities | - Court Appointed Receiver |
| - Low Income Housing/Tax Credit | - State of CT 8-30g |
| - Assisted Living Facilities | |



CONSTRUCTION MANAGEMENT
PROGRAM MANAGEMENT
GENERAL CONTRACTING
DESIGN BUILD

ELEVATE YOUR EXPECTATIONS

We anticipate, manage, and overcome challenges to ensure each project's success.

7 Summits Construction

7 Summits Construction is a unique construction services firm. By looking at construction as a subset of the entire project's lifecycle, we provide 360-degree project navigation from concept to operations through a custom-tailored approach. Beginning with concept and feasibility, advising on financing and legal support, developing project and construction budgets, providing preconstruction and construction services, and finally supporting your in-house team with operations for project success. 7 Summits delivers this approach through listening, teamwork, and transparent communication leading to trust, and open problem solving. Then, we execute with precision.

7 Summits Construction is a full-service, Hartford-based, minority owned construction company. We are committed to excellence in our offerings of Construction Management, Owner's Project Management, General Contracting and Project Feasibility services. With our staff's collective experience that exceeds \$1B in project costs, we can execute any project type, size or complexity. Our work includes new buildings, renovations and historic rehabilitations for public and private clients. We look forward to working with you and elevating your expectations.

For more information, please contact our Director Strategy & Business Development Diana Colcord - (860) 990-2198 | dcolcord@7summitscc.com

Who We Are

SERVICES PROVIDED

- Construction Management
- Owner's Project Management
- General Contracting
- Design Build

PROJECT SIZE


- \$1-100M

DIVERSITY AND RELIABILITY

- MBE Ownership
- CT Major Contractors License

CORE VALUES

We design solutions to the challenges posed by the built environment. We believe in saying what you mean and meaning what you say – which results in trusted relationships. We are in this together.

 36 John St
Hartford, CT 06106

Contact Us



860.756.5577



www.7summitscc.com



NON-PROFIT

- Blue Hills Civic Association
- Children's Museum West Hartford
- Union League of Greater Hartford
- South Hartford Boys & Girls Club
- LaPenta Boys & Girls Club NW
- Blue Hill Recreation Center
- Bethel Church Community Center
- Faith 7th Day Adventist Church
- San Juan Center
- CT Association of School Based Health Centers

ADAPTIVE REUSE/COMMERCIAL

- Park & Main Mixed-Use Development
- 36 John Street
- LaSalle Road Mixed Use
- Mission Escape
- Howard K Funeral Home
- Albany & Woodland Place
- Feldspar Ridge
- Ardent Displays

HEALTHCARE

- Hartford Healthcare Corp.

ACADEMIC

- Trinity College
- Burns Elementary School
- Grace Academy
- Yale Peabody Museum
- Batchelder Elementary School Montessori
- Dr. Martin Luther King Campus Renovation
- Windham High School
- Vernon Vo-Ag Program Aquaculture Lab

MUNICIPAL

- Hartford Fire House #2
- Hartford Fire House #11
- Hartford Housing Authority
- Belden Library
- Hartford Sidewalk Replacement Program
- Cromwell DPW Garage and Offices
- Rocky Hill Water Pollution Control Facility
- New Haven Air Rights Garage
- Town of Hamden Youth and Arts Center

GOVERNMENT

- 7 Summits has done for the Federal Government and the following states:
 - CT, RI, NY, MA



Contact Us



860.756.5577



www.7summitscc.com

7 Summits Construction

Relevant Renovation and Construction Management Experience

Urban League of Greater Hartford: 140 Woodland Street Office Building Improvements, Hartford

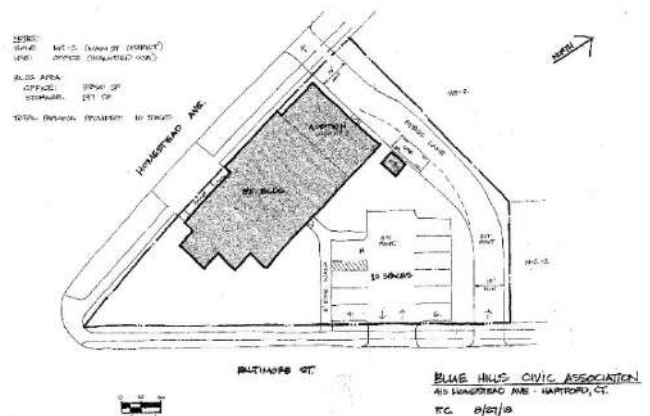
Owner/Client Reference: Mr. David J. Hopkins, President and Chief Executive Officer (860) 541-1719-Direct dhopkins@ulgh.org

Since 2019, 7 Summits Construction has been collaborating with the Executive Director and staff of the Urban League regarding improvements to their multi-story office building. For years, several challenges with the building have emerged and 7 Summits Construction was called in to evaluate the structure, identify the priority repairs needed and to provide construction cost estimates for these items. These items included Mechanical Systems, Roofing, Site Drainage and Pavement Repair. 7 Summits Construction has also provided the Urban League with assistance in preparing a House Bond Request application to receive funding from the state for the proposed repairs.



Blue Hills Civic Association: Office and Training Center (Redevelopment of 410 Homestead Avenue), Hartford

Owner/Client Reference: Vicki Gallon-Clark, MPA, Executive Director 860-560-7360 x 303 clarkv@bluehillscivic.org



New South Hartford Boys & Girls Club, Hartford

Owner/Client Reference: Mr. Samuel S. Gray, Jr., Chief Executive Officer, Boys & Girls Clubs of Hartford, Inc. (860) 929-7660 sgray@bgchartford.org

The Boys and Girls Club of Hartford, Inc. is a volunteer-centered program that fosters community, good citizenship, and safe environments. With the new location, the BGCH hopes to serve over 1,500 youth annually, offering various services, programs, and activities, with the goals to increase high school graduation rates, reduce substance abuse and other crimes, and decrease teen pregnancy rates. The new 26,000 square foot Club consists of a Teen Center, Technical Center, Game Room, and Craft Room, while the field house will hold a full size Basketball Court, Video and Sound Recording Studio, Kitchen, Storage, Locker Rooms, and various staff offices. Scope of work for 7 Summits Construction included management of site selection and acquisition, building committee meetings, and architect and design team selection process, as well as preparation and updating of several conceptual budget estimates and total project cost reports for new construction and associated site work. The new South Hartford Club opened to great anticipation in 2021 at a cost of \$ 10.5 million.

7 Summits Construction has been working with the Blue Hills Civic Association since 2018 on the acquisition due diligence, conceptual building renovation and expansion, site planning, and preparation of a comprehensive and successful March 2019 House Bond Request Application. The firm was selected as Construction Manager in 2020. The improved Office and Training Center is estimated to cost \$ 2.3 million to construct with a total project cost estimated at \$ 2.8 million. 410 Homestead Avenue, the former Webster Bank branch, was donated to Blue Hills Civic Association to be used as its corporate office and training center. This is a central location for the BHCA, where the organization can effectively deliver programming and training services to the community. The existing building is approximately 6,000 square feet, and a new 1,500 square foot addition and full renovation of the facility was required to make it operable. The parking lot and driveways are expanded and renovated. The

intent of this project and its improvements will not only revitalize the neighborhood, but will also provide extensive services with an emphasis on Workforce Development, Small Business Training, Life Skill Training Classes, Comprehensive Family Resources, pertaining to financial, education and health related issues, and Housing Assistance to help owners in gaining access to important programs to help maintain a home, which in return, will help grow the city's tax base. The BHCA Training Center has made a positive impact in the Blue Hills and surrounding community by providing such services. The project also benefits residents from the North Hartford Promise Zone and other low-income residents from Hartford. Full due diligence including programming, conceptual architectural drawings, site plan, site survey, environmental testing, and construction overview and estimating have been completed. The newly renovated and expanded facility will be open to the public in late 2023.

City of Hartford: Department of Public Works: Sisson Avenue Firehouse # 11 Renovations, Hartford

Owner/Client Reference: Mr. Frank Dellaripa, PE, City Engineer, Department of Public Works, City of Hartford (860) 757-9975 Frank.Dellaripa@hartford.gov

This \$ 2.5 million City of Hartford Capital Improvement Project was awarded to 7 Summits Construction in 2021 and was recently completed in 2023. Work involved renovation of fire house abatement/selective demolition, replacement of windows, sitework masonry, miscellaneous metals, door, frames, hardware, tile flooring, ceilings, and painting. The project includes repaving the parking lot at the Fire House 11, making drainage improvements, increasing the main driveway width to the rear of the property, adding ADA ramps for ingress/egress, and creating a storage area for the roll-out garbage and recycling containers. 7 Summits also analyzed the ability for adding another driveway on the northern side of the building for passenger cars. 7 Summits collaborated closely with the City's Department of Public Works and Fire Department to mitigate lingering pandemic supply chain and subcontractor/skilled labor concerns to keep the schedule and budget on track.

City of Hartford: Department of Public Works: Batchelder Elementary School Interior and Exterior Improvements, Hartford

Owner/Client Reference: Mr. Frank Dellaripa, PE, City Engineer, Department of Public Works, City of Hartford (860) 757-9975 Frank.Dellaripa@hartford.gov

7 Summits Construction completed \$ 935,000 of renovation work to seventeen classrooms, four restrooms, the Main Office, Nurse's Office, staff lounge, gymnasium, and auditorium, all while the school was occupied. The project also included exterior repair to egress stair on the north side of the building. All interior work occurred during second shift and required close coordination with both the school's administration and custodial staff. During the project, a maximum of only two classrooms were available for construction at any given time. In the classrooms, renovation involved the removal of existing millwork and associated plumbing and electrical to accommodate the installation of new millwork with child and adult sinks, ADA compliant dishwasher, and ADA compliant refrigerator. Construction work in the restrooms involved the removal of existing toilets, urinals and lavatories, along with installation of associated grab bars and toilet accessories to accommodate the new plumbing fixtures and accessories appropriate for small children. The Batchelder school was originally built in 1958.

Hartford School Building Committee: Burns Latino Studies Academy - Renovation-as-New, Hartford

Owner Reference: Mr. John Motley, Former Chairman, Hartford School Building Committee (860) 707-5158 John@motleyconsulting.com

A major, occupied renovation to "as-new" condition is proposed for the Burns Latino Studies Academy. Phase 1 consisted of renovation of four existing PreK Magnet classrooms and was completed in 2021. Phase 2 is being executed by the Construction Manager, in partnership with 7 Summits Construction as a 10-phase, 36-month occupied renovation consisting of hazardous materials abatement, demolition, and renovation, including sitework, building envelope, interiors, programmatic changes, ADA accessibility issues, structural systems, food service, science labs,

library/media center, nursing/health services, and new mechanical, electrical, and plumbing systems. Completion is required for the start of the 2023-2024 academic year, at which time the school will be able to accommodate 496 PreK-8 students. The program involves 110,000 square feet and is currently estimated at \$ 55.4 million total project cost. 7 Summits Construction has been preparing quantity takeoffs, reviewing



technical specifications, and preparing multiple MWBE "breakout" bid packages. The team is providing consistent leadership from kick-off to final closeout, including commitment to providing significant opportunities for MWBE enterprises as evidenced by the Burns Latino Studies Academy project, where the team attained over 35% City of Hartford set-aside participation on \$ 37.35 million of awarded trade contracts. The City of Hartford requirements exceeds most State of Connecticut standards and are considered one of the most stringent. Breaking down the project into 39 separate

bid packages - specifically targeting MWBE participation - was a major focus of 7 Summits Construction's preconstruction effort.



Hartford School Building Committee: Dr. Martin Luther King, Jr. High School Campus Improvements - Renovation-as-New, Hartford

Owner Reference: Mr. John Motley, Former Chairman, Hartford School Building Committee (860) 707-5158 John@motleyconsulting.com

Renovation-as-New of the Dr. Martin Luther King, Jr., High School and improvements to the campus for the Hartford School Building Committee was a fast-track multiple-phased project incorporating the existing Dr. Martin Luther King, Jr. Middle School and existing Breakthrough North Magnet Elementary into one campus. The project team's task was to reimagine and renovate-as-new the unoccupied facility into a unified 11.5 acre PreK-8 Campus. The project involved 140,000 square foot renovation and 34,000 square feet new

construction. Completion occurred in 2020 and the total project cost was \$ 111 million. 7 Summits Construction provided multiple construction management services, including pre-construction services, cost estimating, scheduling and full-time, on-site field project engineering, and compliance monitoring. “MLK” has been the winner of several awards for design and construction excellence, including an Award of Merit from Preservation Connecticut and the Project Team Award for K-12 Schools (Large) from the Connecticut Building Congress. The original 175,000 square foot building was constructed as the first Thomas Snell Weaver High School, and was completed in 1922.



The Children’s Museum: Relocation to the City of Hartford, Hartford

Owner/Client Reference: Dr. Michael J. Werle, PhD, Executive Director, The Children’s Museum Group (860) 231-2830 x 600
mwerle@thechildrensmuseumct.org

7 Summits Construction has assisted The Children’s Museum since August 2020 in site selection, due diligence, feasibility, construction cost estimating, and conceptual planning for the institution’s relocation of its West Hartford facilities back into Hartford where it originally began operations in 1927. TCM must move its museum and preschool from their current leased location (which is being sold by its Owner), or else close operations and numerous ongoing programs for the underserved communities of Connecticut. The Children’s Museum Relocation has been in the planning stage for several months and was enabled by a grant-in-aid from the State of Connecticut Department of Economic Community Development (CT DECD). The total project cost is anticipated to be approximately \$ 20 million, with funds coming from both public and private sources. This proposed project will include two major new elements: 1. A *Net-Zero Energy-Use* flagship demonstration, learning and training center - the first such public space in the State of Connecticut. 2. Start-up of the *Center for STEAM Advancement*—a collaborative initiative providing Science, Technology, Engineering, Arts and Math education and learning enrichment opportunities to children from kindergarten through college. As Owner’s Representative to the Relocation Committee, 7 Summits Construction was responsible for the identification, thorough investigation, evaluation, and presentation of seven sites for consideration, including both ground up and/or existing properties to be renovated. In collaboration with the Relocation Committee, 7 Summits Construction measured each site against very specific selection criteria, including but not limited to: Property Availability / Potential to Acquire; Site Suitability to Accommodate TCM Program and Future Expansion; Overall Site Characteristics; Location / Traffic and Access; Neighborhood / NRZ Support; Historical Significance; Zoning Regulations and Regulatory Process; Potential Environmental Concerns; Proximity to Competing / Complimentary Venues; Identity and Branding; Development Costs; and Development Schedule. The site selection feasibility process clearly revealed that three of the seven sites studied had the highest potential to relocate The Children’s Museum Campus to Hartford in a timely, effective and cost efficient manner. A combination of factors determined the rejection of the other sites – those not able to best accommodate TCM’s desired program, those involving a high cost of development (including acquisition and construction), and those whose development schedules would be prohibitive to a successful relocation. Evidence of determinations were provided in summary findings for each studied site. In addition to the evaluation and site shortlist, 7 Summits Construction also managed the development of preliminary concepts, schematic designs and construction cost estimating. Both indoor and outdoor areas were programmed



to include Preschool space, a Wildlife Sanctuary, Maintenance/Storage and other related spaces, featuring a major 20,000 square foot courtyard. It was further understood that the project would include a new Museum Building with a footprint area of approximately 30,000 square feet, and a new Preschool Building with a footprint area of approximately 3,000 to 4,000 square feet. Construction cost estimating accounted for the special characteristics of Hartford’s varved clay soil relative to foundation design and the thickness and consolidation properties required. It was assumed that the clay soil beneath the foundations would need to be stiffened using a ground improvement method such as aggregate piers, thereby enhancing bearing capacity and reducing settlement. Cost estimates also included interior features such as special exhibit and museum collection areas.

Town of Cromwell: Construction Oversight Services as Clerk of the Works for the Renovation and Expansion of the Belden Public Library and the new WPCA/Public Works Facility, Cromwell

Owner/Client References: Mr. Jon Harriman, PE, Town Engineer, Town of Cromwell 860-632-3465 jharriman@cromwellct.com
Ms. Kara S. Canney, Director, Cromwell Belden Public Library, Town of Cromwell 860-632-3463 mkcanney@cromwellct.com

7 Summits Construction was engaged by the Town of Cromwell to provide Construction Oversight Services as Clerk of the Works for the 3,500 square foot expansion and 13,542 square foot renovation of the Belden Public Library, located in the Town of Cromwell’s Town Hall Complex. In this role, 7 Summits Construction performed part-time, on-site construction observation during the active construction phase necessary to determine if progress and quality of the work was completed in conformance with the Contract Documents and



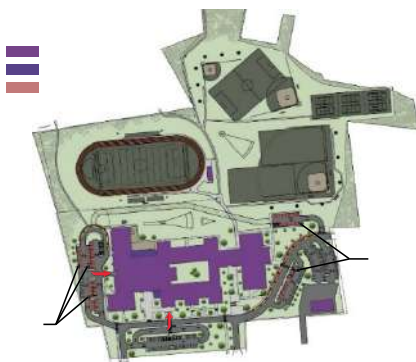
expectations of the Town. 7 Summits Construction acted as the Owner’s “eyes and ears” in the field and collaborated extremely closely with the Town Engineer and the Library Director. Because the Town Hall Complex included both the library and senior center, as well as town offices, site safety in the form of pedestrian and vehicular circulation plans, coordinated construction logistics, strategic phasing of the work, noise and dust mitigation, for example, were important among the project’s many priorities. The work was completed in late 2019. Of 7 Summits Construction’s performance, Town of Cromwell Town Engineer Jon Harriman, PE has said “As clerk of the works, Seven Summits has performed beyond our expectations. We were so pleased with their

performance as clerk on the Library Project that we hired them again to clerk the Public Works Facility project. We found Dan Paquette to be a valuable resource and very knowledgeable in all phases of building construction and rehabilitation.” As a result of 7 Summits Construction’s successful performance on the Belden Library project, the firm was awarded a similar Clerk of the Works contract in 2019 to perform construction oversight services for Cromwell’s combined Department of Public Works and Cromwell Water Pollution Control Authority Facility. This Design-Build project involved new construction of 25,500 square feet for the main garage, another 7,600 square feet for mechanic’s space and a truck wash facility, 5,850 square feet for office space, and additional space for proposed future expansion, sited on a 13-acre campus at the County Line Industrial Park. The cost was \$ 9.3 million and completion was (on-schedule) in late 2020. The project also involved the relocation of the Town’s existing transfer station to the property.

Town of Windham: Windham High School and Board of Education Offices – Renovation-as-New, Windham

Client Reference: Mr. David N. Patrick, Project Executive, Downes Construction Company (860) 229-3755 dpatrik@downesco.com

The Town of Windham is renovating to “as-new” condition the existing High School and adding to their Early Childhood Center. As part of these renovations and new additions, there will be modifications to their current Early Childhood Center and a newly relocated Central Office for the Town Board of Education, both of which will also be within the footprint of the newly renovated facility. The existing building is a two-story masonry building, constructed in 1970 and consists of roughly 225,000 square feet. The project involves an occupied,



multiple-phase renovation to avoid any disruption of the operations of the school, Early Childhood Center, or BOE offices. Renovation work starts with the conversion of the existing Natatorium into the new Central Offices space, followed by modifications to accommodate the new Early Childhood Center components, and then the

balance of the High School. A new stairwell will be added near the school’s front entrance and portions of the exterior façade overhangs will also be modified to address structural framing concerns. Interior areas are being modified with the intention of updating the classrooms, all support spaces (Admin Offices, Auditorium, Gymnasiums, and Cafeteria). Technology and MEP upgrades are also being made, as are improvements to the existing 41-acre campus involving all existing parking areas, along with the creation of new access drives and parking., as well as upgrades to athletic fields. The total project cost is \$ 112.3 million and is slated for completion in 2024. 7 Summits Construction has partnered with the Construction Manager to provide full-time, on-site field project engineering services, as well as construction cost estimating and scheduling.

Grace Academy School: Classroom Renovations (2017 and 2020), Hartford

Owner/Client Reference: Mr. Matthew Fitzsimons, Headmaster, Grace Academy 860-263-7535 mfitzsimons@graceacademyhartford.org

Grace Academy is an urban, hardscape campus for young women comprised of grades 5-8. In 2017, 7 Summits Construction was awarded to provide Construction Management services for the renovation of an existing basement storage area into offices and a classroom. Nestled on Main Street, the construction team worked carefully not to disrupt the existing dense campus for the renovation. Responsibilities included selective demolition with complete cleanup of job site, construction of drywall partitions and door openings, wall painting, and installation of insulation, gypsum board, an unfinished single wood door with a glass insert, an unfinished solid core “non fire rated” door with wood

framing, electrical, and a drop ceiling. Due to the success of the 2017 renovation project, Grace Academy again hired 7 Summits Construction in 2020 to provide Construction Management services for a major new initiative – additional improvements to the basement as well as renovation of the Second Floor and Third Floor of the existing 4-Story Central Baptist Church - located at 455-457 Main Street in Hartford. Renovation has allowed Grace Academy the space needed for its new Intermediate School. 7 Summits Construction has managed all interior renovation work as well as improvements to exterior spaces for parking and student pick-up and drop-off.

UConn: Toscano Family Ice Forum, Storrs Campus

Client Reference: Mr. Joseph P Diiorio, Manager, Turner Construction Company (203) 712-8250 – Office jdiiorio@tcco.com



The new, state-of-the-art 2,600-seat arena is located adjacent to the current Freitas Ice Arena in the Athletics District on Jim Calhoun Way and has been built to stir fan interest, improve recruiting and propel the hockey program to new heights. Construction of the new arena stems from the university’s decision to join Hockey East in 2013, as the conference requires schools to have an on-campus

arena that seats at least 4,000 people. (As the school explored options for how to comply with that stipulation, UConn was permitted to hold games at the XL Center and ultimately negotiated down the on-campus facility seating requirement to 2,500.) Team facilities include full Division I training and support for the women’s and men’s teams; team lounges; dry locker area and locker rooms with video displays; locker rooms for the visiting teams; training space with a hydrotherapy area; strength and conditioning room; and other areas such as coaches’ offices, a press box, dining area, ice plant and spaces for support services. The new facility also enjoys a large, center-hung display scoreboard with perimeter ribbon boards, designed to create an outstanding fan experience with state-of-the-art sound and lighting features. The new 97,300 square foot arena has been designed to meet all NCAA Division I ice hockey requirements and all Hockey East regulations (which the existing Freitas Ice Forum did not). The budget for the new, on-campus hockey arena was \$ 70 million (comprised of university funds, revenue bonds and private donations) and completion will occur in late 2022. In collaboration with the Construction Manager, 7 Summits Construction provided full-time, on-site project field engineering services.

REFERENCES

The following client references can attest to the high quality of work our team consistently provides its clients.



+ **"Park & Main" Mixed-Use Residential Development**

7Summits Realty, Freeman Companies, and 7Summits Construction Clay Fowler, Chairman & CEO | Spinnaker Real Estate Partners, LLC
P: 203.354.1550

+ **Holcomb Street Redevelopment**

7Summits Realty

William Diaz, City of Hartford | 260 Constitutional Plaza - 1st Floor, Hartford, CT | P: 860.757.9311 | diazw003@hartford.gov

+ **NeighborWorks New Horizons**

QA+M Architecture

Tom Cruess, President & CEO | 203 Willow Street, Waterbury, CT 06710 P: 203.562.4514 |tom@nwnh.net

+ **John D'Amelia & Associates, LLC**

QA+M Architecture

John D'Amelia, President | 37 Brookside Road, Waterbury, CT 06708
P: 203.757.1138 | jdamelia@jdamelia.com

+ **Glastonbury Housing Authority**

QA+M Architecture

Neil Griffin, Housing Authority Director | 25 Risley Rd, Glastonbury, CT 06033 P: 860.652.7570 | ngriffin@glastha.org

SECTION 2

Project Vision
Development Summary
Site Plan



Project Vision & Development Summary



Introduction

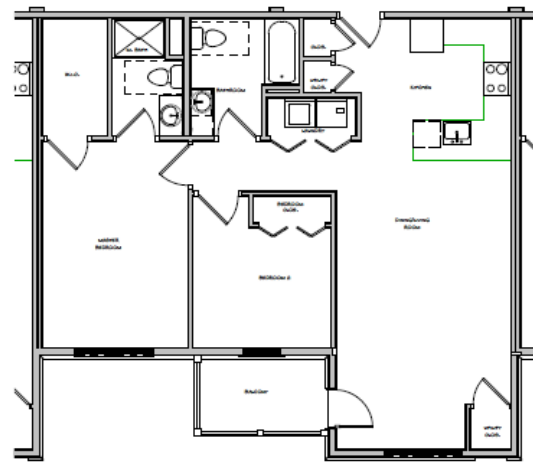
The proposed Granby Senior Housing Community is set to create expanded living opportunities tailored for the town's active adult population, specifically those aged 62 and older. Envisioned as a vibrant "lifestyle center," this new neighborhood will be conveniently located directly across from the Stop and Shop Plaza, within walking distance of over two dozen essential stores and services, including a grocery store, fitness center, auto shop, urgent care center, restaurants, pet shop, liquor store, and a day spa. While we have created numerous concept options, we are presenting our Concept 3 option shown here.

Development Overview

This multi-phased project will feature state-of-the-art one- and two-bedroom apartments, designed to provide the comforts and amenities of luxury living. Residents will enjoy:

- Spacious, Open-Plan Living: Each unit will be designed to maximize natural light and space, creating an inviting atmosphere.
- Large Bedrooms with Walk-In Closets: Generous bedroom sizes and storage options ensure comfort and convenience.
- Modern Bathrooms: All apartments will feature spacious bathrooms equipped with walk-in showers, promoting ease of use.
- Granite-Clad Kitchens: Stylish kitchens will include stainless-steel appliances and ample storage, perfect for both cooking and entertaining.

Importantly, all apartments will comply with the Americans with Disabilities Act (ADA), ensuring accessibility and support for aging in place.



TYPICAL 2 BEDROOM UNIT
SCALE: 1/4" = 1'-0"

2

Community Amenities

The Granby Senior Housing Community will also offer a variety of shared amenities to enhance residents' quality of life, including:

- Common Areas: A community room and kitchen will foster social interaction and engagement.
- Exercise Facilities: An on-site exercise room will promote health and wellness.
- Meeting and Game Spaces: Designated areas for activities and gatherings will encourage community building.
- Work-from-Home Offices: Communal office spaces will support residents who work remotely.

Outdoor amenities will complement the indoor features, providing residents with opportunities for recreation and relaxation, such as:

- Walking Trails: Scenic paths for leisurely strolls or brisk walks.

- **Exercise Lawn:** A dedicated space for fitness activities and classes.
- **Dog Park/Run:** An enclosed area for pets to socialize and play.
- **Pavilion:** A gathering space for community events and outdoor activities.



Inclusivity and Affordability

This development will operate as a mixed-income project, ensuring affordability for Granby residents of all backgrounds. By providing “senior affordable rental” options, we aim to create a diverse community that supports individuals from various economic levels. Upon completion, the Granby Senior Housing Community will offer homes for more than 100 residents, fostering a sense of belonging and connection.

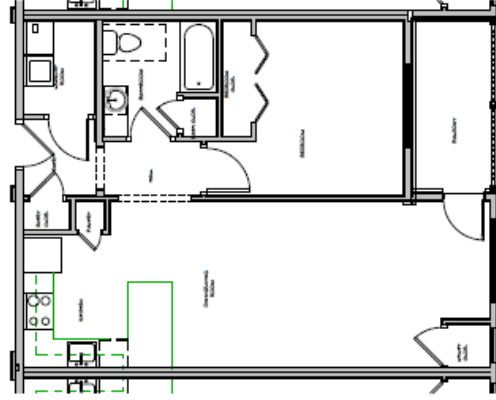
Anticipated Costs

Details regarding rental costs for the housing units will be outlined in the “Development Costs and Timeline” section of this proposal, ensuring transparency and clarity for all stakeholders involved.

This proposal aims to not only meet the housing needs of Granby's seniors but also to enhance their overall quality of life through thoughtfully designed spaces and community-oriented amenities. We are excited about the potential of this project to transform the Granby community and support its valued residents.

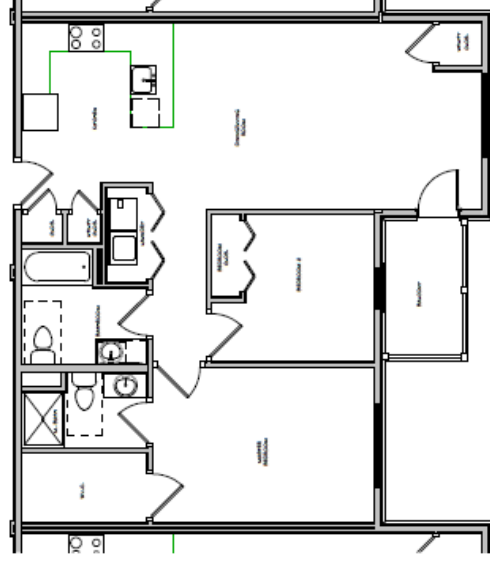






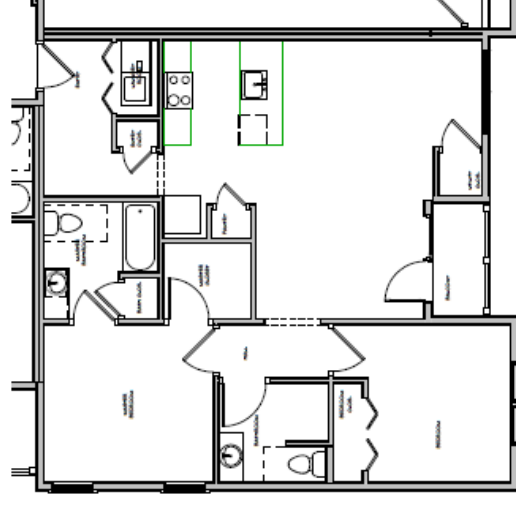
TYPICAL 1 BEDROOM UNIT
SCALE: 1/4" = 1'-0"

1



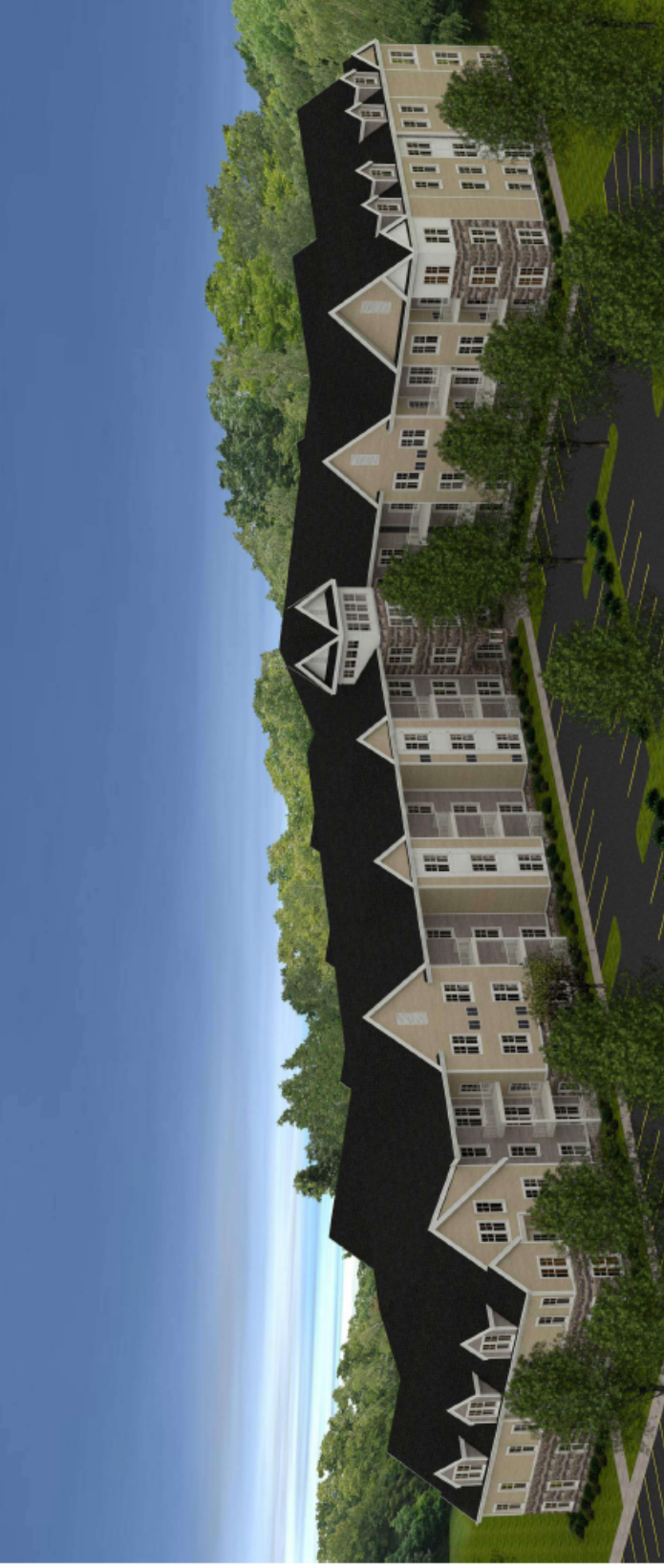
TYPICAL 2 BEDROOM UNIT
SCALE: 1/4" = 1'-0"

2



TYPICAL 2 BEDROOM CORNER UNIT
SCALE: 1/4" = 1'-0"

3



RENDERINGS

5 CANTON ROAD | GRANBY, CT

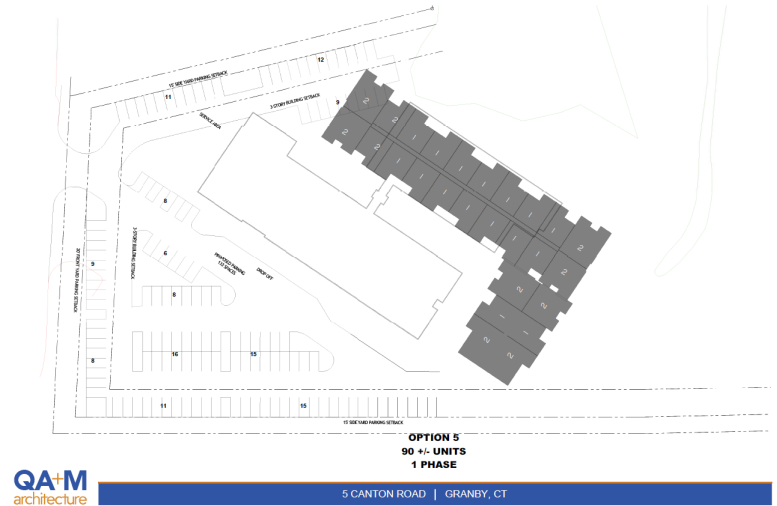
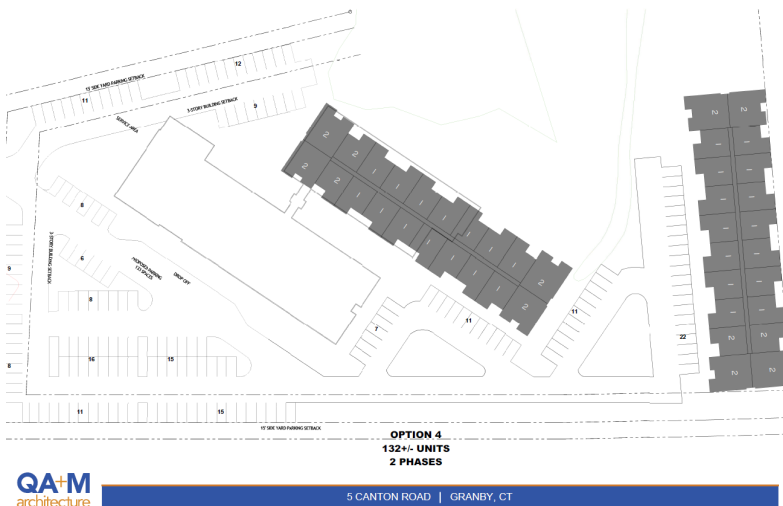
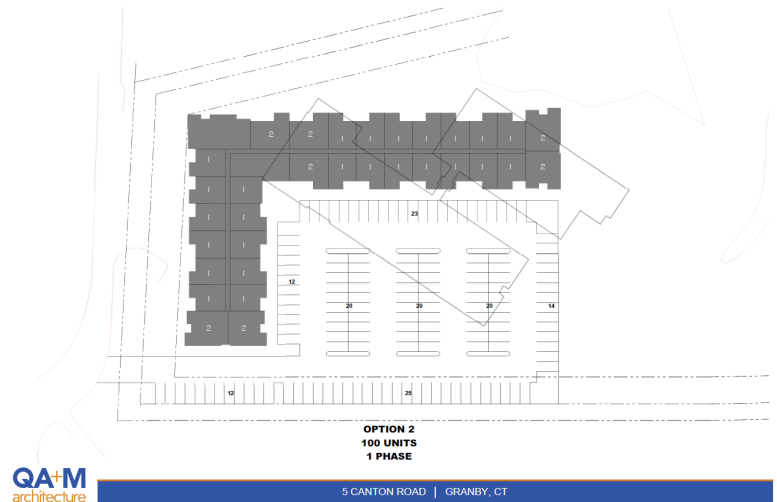
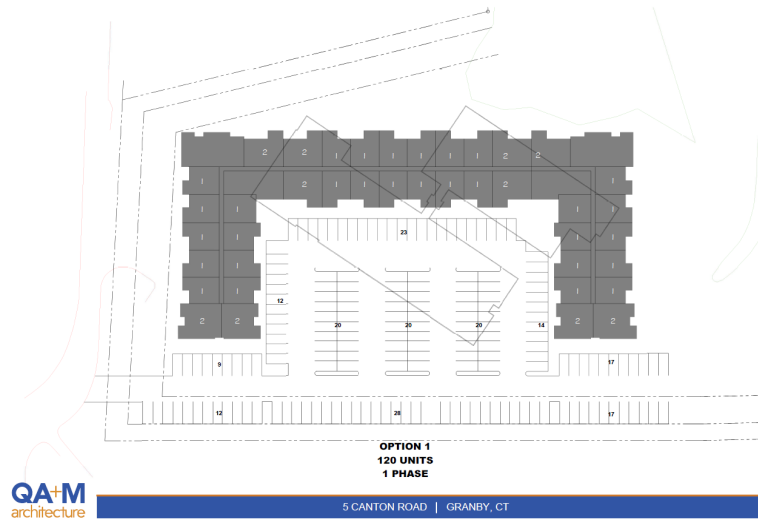


RENDERINGS

5 CANTON ROAD | GRANBY, CT

Alternative Design Options

7Summits Realty, and our team is committed to ensuring that this Senior Housing Development for the Town of Granby meets the diverse needs of the community. As part of our due diligence we have developed and presented several alternative concept plans that explore various layouts, amenities, and service models. These option reflect our dedication to creating a vibrant, supportive environment for seniors while also considering factors such as sustainability, accessibility, and community integration. By providing these alternatives we aim to enable stakeholders in meaningful discussions ensuring that the final design not only aligns with community values, but also enhances the overall quality of life for residents



SECTION 3

Development Costs

Timeline

Site Acquisition Price



Development Costs and Timeline

Project Budget

7Summits Realty proposes to redevelop the former Kearns School into a mixed income, affordable housing development for seniors ages 62 years of age or older. The proposed 120-unit housing complex will serve individuals with a range of incomes. See breakdown below:

% of AMI	Units	# of Bdrms	Rent	Annual Income
50%	31	1	\$1,142	\$42,650
60%	4	1	\$1,371	\$51,180
Market	4	1	\$1,392	\$51,181+
50%	5	2	\$1,371	\$48,750
60%	8	2	\$1,645	\$58,500
Market	8	2	\$2,139	\$58,501+

The estimated total development cost (TDC) of the project is \$53,128,248. The total hard costs including contingency are estimated to be \$43,427,994. The remainder of the TDC is comprised of architecture & engineering fees, surveying, environmental engineering, legal fees, financing costs, real estate taxes & insurance, and other soft costs. Key assumptions include:

Rent calculation

1. Affordable units align with DOH Rent Limits by income band.
2. Market rate units are calculated at 130% of the fair market rent.

Operating Expenses

1. \$9,666 per unit
2. 2 Part-Time Employees
3. 5% Management Fees
4. Utilities included in rent
5. Outsource contracts
6. Real estate taxes are calculated at \$2,100 per unit
7. \$400 per unit in reserves
8. 1.25 DSC

Capital Costs

1. \$442,735 per unit
2. Construction Costs (Res): \$344 per sq. ft.
3. Construction Contingency: 5%
4. Architect and Engineering Fees: 6% of construction
5. Legal: \$13,300 per source
6. CHFA/DOH Legal Fees: \$25,000
7. Developer Fee: 7.8%
8. 8. Acquisition: \$0



Below is a summary of the sources and uses.

Uses	Amount	Sources	Amount
Construction Costs	\$ 41,359,994	CHFA LIHTC Net Proceeds	\$ 8,948,254
Construction Contingency	\$ 2,068,000	EverSources Energy Rebates	\$ 300,000
TOTAL HARD COSTS	\$ 43,427,994	HUD	\$ 17,280,000
Architect/Engineering Fees	\$ 2,603,138	Federal Home Loan Bank	\$ 1,700,000
Finance and Interim Costs	\$ 1,390,552	CT Department of Housing	\$ 11,000,000
Soft Costs	\$ 636,000	Capital Regional Council of Government	\$ 500,000
Developer Fee	\$ 3,844,614	Deferred Developer Fee	\$ 1,999,994
Acquisition	\$ -	CHFA	\$ 10,500,000
Reserves	\$ 948,894	MRDA	\$ 900,000
Entity and Syndication Expenses	\$ 277,060		
Total Development Uses	\$ 53,128,252	Total Funding Sources	\$ 53,128,248

a. Schedule Overview

7Summits offers comprehensive real estate development services to execute a project successfully. Our team can lead a project from the development concept through construction completion. Below is a step-by-step implementation strategy.

1. Predevelopment: Form the Development Concept

- Identify Mission
- Market Analysis
- Evaluate the Site
- Highest & Best Use
- Develop Redevelopment Plan

2. Predevelopment: Test the Feasibility

- Perform Due Diligence
- Project Setup
- Project Planning
- Financial Feasibility

3. Development: Make the Deal Go

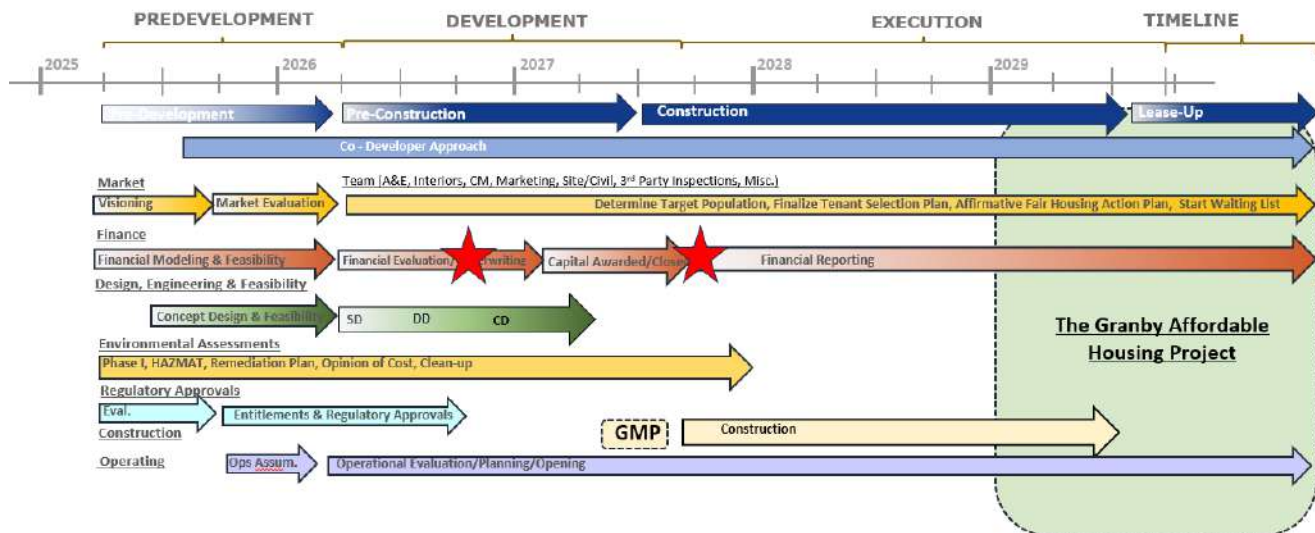
- Procure Team and Contracts
- Development Finance
- Pre-Design & Construction
- Entitlements & Permitting
- Community Outreach &

4. Execution: Construction and Closeout

- Conduct site work
- Start vertical construction
- Capital Planning
- Close-out
- Lease-up

There is no one size fits all timeline for real estate development. The distance between a vacant building and a finished building varies widely based on multiple factors, include the type of project, the design, the location, the zoning rules, and the permits required. It could take 2 years; it could also take six years. Below is the timeline we anticipate following.

Development Timeline



b. Financing

As you can see from the chart above, 7Summits proposes to leverage both private and public financing in support of the development. These sources include:

- Low Income Housing Tax Credits (LIHTC) are calculated based on the eligible basis (costs) by the 4% LIHTC Rate multiplied by 10 years and the equity raise of \$0.94. An allocation of 4% LIHTC is not competitive, rather any project awarded volume cap and financed with tax-exempt bonds qualify.
- Utility Rebate Incentives and other energy tax credits are available through the Inflation Reduction Act and are not competitive.
- HUD Section 202 Supportive Housing for the Elderly Program and/or Congressional Direct Spending.
- Federal Home Loan Bank, Affordable Housing Program (AHP): The AHP is a competitive funding source that provides both grants (up to \$850,000) and reduced interest rate loans to affordable housing projects. The AHP is particularly important because it is one of the few sources to provide early funding commitment.
- Department of Housing: DOH provides grants and deferred loans to affordable housing projects. The maximum limits per project is \$5,500,000.

- Brownfield's financing through the Capital Region Council of Government to remediate environmental hazards in the building or onsite.
- Private financing will be leveraged with Connecticut Housing Financing Authority Tax Exempt Bonds and the Municipal Redevelopment Authority.

c. Identify long-term management and ownership of development

7Summits Realty intends to maintain ownership of the development in perpetuity and will partner with DeMarco Property Management to provide the day-to-day property management services. Please refer to DeMarco's Company Overview for more information regarding their property management processes and team.



Contact us at:

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06106

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info@7summitscc.com

www.7summitscc.com

**Rohan A. Freeman, PE, LS,
President**



September 26, 2024

Town of Granby, Community Development Department
ATTN: Abby Kenyon
15 North Granby Road
Granby, CT 06035
Via Email: akenyon@granby-ct.gov

RE: 5 Canton Road, Kearns School RFP

Dear Ms. Kenyon:

On behalf of New Samaritan Corporation, I am pleased to submit for your consideration this response to the Town of Granby's request for proposals as it relates to 5 Canton Road, Kearns School. New Samaritan was originally formed as an incubator non-profit to support systems change projects through UCC churches and ecumenical clergy efforts. And in 1980, NSC's focus became housing and related services for the purpose of building human dignity.

By 1974, it became clear that one of the major problems for non-profit housing was finding a property manager that shared the mission and perspective of serving the well-being of the residents, not just keeping property occupied. To fill this gap New Samaritan established Elderly Housing Management, Inc. With this expansion of mission, NSC has been able to provide confidence to local owners that services will be delivered as an extension of their own mission.

New Samaritan Corporation has over 40 years of housing acquisition, rehabilitation, and development management experience to provide contractual services to organizations interested in redeveloping, sustaining and increasing their housing portfolio. Our staff has direct, first-hand knowledge and experience in administering and preparing funding applications.

Our most recent new construction development project, Parkville Apartments in Hartford, CT, had its Ribbon Cutting June 4th. Funding sources and partner included, HUD 202 Capital funding (\$4,501,900), NSC Sponsor Contribution (\$2,451,000), City of Hartford HOME funding (\$2,176,344), CT Department of Housing funding (\$873,000), and CHFA Housing Tax Credit Contribution funding (\$500,000) purchased by Eversource.

Enclosed, please find our project team qualifications and information related to our development experience. Should you have any questions or need additional information, please do not hesitate to contact me at 860-966-1648 or kmcdermott@ehmchm.org. I will serve as your primary contact.

Thank you for your consideration. I look forward to continuing this conversation.

Sincerely,

Kelly McDermott

Kelly McDermott
President & CEO



Mission Statement

Creating quality affordable living environments that are comfortable, diverse, equitable, and inclusive by breaking down barriers of race, class, and geography, and providing a foundation for human dignity.

Background and Experience

New Samaritan Corporation, established in 1970, is an independent not-for-profit corporation with extensive experience in housing development and, through its affiliated non-profit management corporations, experience in the management of housing and services for elderly persons and limited non-age restricted communities. New Samaritan develops and manages both subsidized and non-subsidized low- and moderate-income housing. With its corporate office located in North Haven and staff located at offices around the state, New Samaritan serves the entire state of Connecticut.

NSC provides locally-based not-for-profits or community agencies with technical assistance in two ways:

- Sponsorship of projects through local groups who become or are related to the NSC non-profit family of corporations, which numbers over 50.
- Technical assistance as described below to non-profit corporations or agencies not in the New Samaritan family.

New Samaritan Corporation has developed housing financed by the U.S. Department of Housing and Urban Development, Connecticut Department of Economic and Community Development, Connecticut Housing Finance Authority, Low Income Housing Tax Credits, U.S. Department of Agriculture, Connecticut Health and Educational Facilities Authority tax exempt bonds, and other sources as well as conventional commercial financing.

New Samaritan has been involved with the development of more than 2000 units of housing. All of the projects are owned by NSC subsidiaries, independent local nonprofit corporations, municipalities or residents' associations. A list of New Samaritan completed projects can be found attached.

New Samaritan Development Corp.

Established In 1999 to build, own, develop, invest in and operate housing related facilities for low- and moderate-income individuals and families. The members of this corporation are the people who are members of the Board of Directors, in office from time to time, of New Samaritan Corporation. In addition to developing new housing opportunities, NSDC owns and manages Wolcott Hills Land Trust, a 118-unit affordable homeownership development in Wolcott, CT.

NSC and NSDC provide Technical Assistance activities including the following:

Program Management Technical Assistance and Implementation: Providing direct technical assistance and capacity to organizations that receive federal and state funding for program implementation and management functions including contracting, staffing, financial and accounting system practices, policy and procedure creation and implementation strategies, program evaluation functions and systems, data and record keeping and other capacity needs.

Housing Development: With over 40 years of housing acquisition, rehabilitation, and development management experience to provide contractual services to organizations interested in redeveloping, sustaining and increasing their housing portfolio's. Whether it is single family homeownership, multifamily rental, mixed income, affordable housing and community development or permanent supportive housing, having direct executive level experience working for Housing Authority's, Municipalities, and developers, we can offer comprehensive housing development services including fundraising and overall project management.

The team can also organize and set up local nonprofit corporations to meet the needs of the development team. General knowledge of tasks for which the group will need legal counsel and the type of legal work to be done with not only increase the capacity of the development team, but it will also create efficiencies in the timeline and appropriate risk management.



BACKGROUND AND EXPERIENCE

For more than forty years, EHM has provided local non-profit organizations with professional real estate management services by trained and experienced personnel who see their purpose as balancing the needs of the real estate with the comfort and convenience of the residents.

Our brand, "where dignity and compassion come home", is intended to include the residents, owners, and staff. The combination of local site staff -- whose focus is the particular housing they manage, and home office support staff -- who provide training, supervision, backup and expertise, creates a fabric of strength and quality which allows the non-profit owner to set policies and standards on a limited budget of time and money.

Managing more than 2900 units in 64 locations throughout the State of Connecticut and Massachusetts, EHM is experienced particularly in working within a regulated environment. The portfolio has regulated properties with oversight agencies including USDA - Rural Development (RD), US Department of Housing and Urban Development (HUD), Connecticut Department of Housing (DOH), Connecticut Housing Finance Authority (CHFA), Connecticut Department of Social Services (DSS), the federal tax credit program through CHFA (LIHTC), and several other subsidy providers.

As an employer of more than two hundred full and part-time employees, EHM has established policies and benefits programs that offer a good working environment where employees can learn new skills and feel the satisfaction of contributing to the happiness and well-being of others.

Working with New Samaritan Corporation, our related development entity, provides EHM with access to current financing, construction and regulatory information. Our development concept is management-oriented with an eye to design of a facility in light of how it will be to live in and to keep up for the long-term viability of the housing. The successes of one housing community can be used again in the next community. The development capacity is also available to housing communities that may wish to expand or need major rehabilitation.

EHM is governed by a fifteen-member volunteer Board of Directors who bring to the corporations a variety of professional expertise. Kelly McDermott, President + CEO of the

corporations, is responsible for the day-to-day direction and oversight of the work of the corporations. The Senior Management Staff also includes a Chief Operating Officer, Comptroller / Director of Finance, Director of Property Management, Director of Resident Services and Director of Human Resources. The Property Management Team includes the Director of Property Management, four Regional Managers, and a Director of Resident Services. These groups supervise all the site staff and the financial office services. The executive and financial offices are in North Haven, Connecticut, with the Regional Managers are located there as well as in their respective regions for easy access to sites. A full range of financial services is handled by the Financial Office. Together, these groups represent more than seven decades of experience in housing management and development.

The unique quality of EHM is the breadth and depth of its non-profit experience in working alongside non-profit owners to provide the full range of housing management services that can make a housing community a good home.

Below, please find a summary of services offered by EHM.

REGULATORY COMPLIANCE

Review of required documents and creation or updating when needed EHM verifies that all necessary documents are in place and updated. These include, but are not limited to:

- Affirmative Fair Housing Marketing Plan;
- Tenant Selection Plan;
- Tenant Lease;
- Housing Application and Waiting list Procedures;
- Tenant Handbook, Rules and Regulations, Pet Policy, Housekeeping Standards
- Regulatory Documents such as the Assistance Agreement, CHFA annual budget and management plan submission, and annual Audit requirements
- And, Compliance with Freedom of Information Act requirements for the Board of Commissioners.

The primary site staff at most EHM facilities is composed of a Property Administrator and Part time Maintenance Superintendent. All staff are employees of Elderly Housing Management, Inc. with salary and benefits billed back to the housing community on a pro-rata basis based on-site hours.

The Property Administrator is responsible for the day-to-day operations, from initial occupancy through move out. This includes supervision of all EHM site staff, rent collection, tenant accounts receivables, late payments, lease compliance, waiting list management, new admission eligibility verifications, annual recertifications, annual unit

inspections, vacant unit preparation and comprehensive maintenance programs.

The Administrator, identifies and enforces lease violations. Depending on the seriousness of the violation, the resident may receive a written reminder, a written warning or a legal notice (KAPA/pre-termination notice) after consultation with the owner.

All records and files are kept in the Administrator's office in a locked file cabinet. These files are periodically reviewed by regulatory agencies for compliance. EHM has a proven track record with CHFA, DOH, HUD, USDA-RD and other regulatory agencies. Ongoing training in Fair Housing provides compliance with all required laws and regulations.

Marketing of units in occupied facilities including the following services: Consultation on long- and short-term planning; Continued advertising and marketing as supported by the operational budget and required by the Affirmative Fair Housing Marketing Plan; Handling of applications, waiting lists, showings, interviews, third-party verifications and certifications of resident income and leasing; and coordination of resident move-ins.

EHM provides supervision to the site through an assigned Regional Manager. Regular on-site meetings, monthly reports, telephone contact and emails are standard procedure.

The Regional Manager is responsible for administrative staff related issues including, but not limited to, performance reviews, counseling, reviewing tenant concerns and addressing them, reviewing overall site capital needs and working to create operational efficiencies and identify funding sources to address these needs.

In addition, the corporate office can provide support with contracting, procurement, support to the Board of Commissioners, and identification of funding sources through DOH, CHFA and other funders to support capital needs. The following list identifies some of the current projects and grants administered by EHM:

- CSHP: Congregate Housing Meals Program funded through HUD
One (1) site under contract with HUD totaling \$3.3 million in funding
Six (6) sites under contract totaling \$5.9 million in funding
- SCMF: Resident Service Coordinator Grant Program funded through HUD Multifamily
- Mary Camp Funds: Grant awards through the CT Conference United Church of Christ; Supports site programming and resident activities at 10 sites
- Community Investment Fund: Grace House in Waterbury has been awarded \$921,000 in CIF funding to support necessary site improvements including ADA upgrades, masonry repairs, roof replacements and kitchen replacements.

- Housing Tax Credit Contribution Program: Funded by CHFA, an application is pending to support \$500,000 in work for the New Parkville project.
- Replacement Reserve Projects – A comprehensive list of active projects has been provided in Exhibit C.

Relationships with the regulatory representatives and subsidy providers are of high importance to EHM in order to be able to more efficiently and effectively deal with problems in those arenas, should they arise.

CORPORATE OFFICE SERVICES

The following ongoing responsibilities and services are part of the corporate control of the quality of management:

- Oversight of all operations including planning, budgeting, scheduling, supervision and reporting in cooperation with the owner. EHM has a full time compliance officer at the corporate office that completes an annual quality control review of each managed property and also maintains a schedule for each site to ensure compliance with regulatory requirements such as audits, annual unit inspections, occupancy requirements and Board roles/responsibilities.
- A fully staffed Human Resources department to support hiring, discharging and replacement of Site Staff, compliance with State and Federal Labor Laws;
- Group purchasing options for on-call emergency services, required insurance policies, and routine housing management maintenance contracted services;
- Liaison with regulatory agencies and access for the owner to general legal and professional information regarding changes in federal and state statute affecting management and regulation of assisted housing.
- Provide accurate and timely monthly reports to Board members. Reports will include those listed below as well as custom reports as may be requested from time to time.
 - Accounts Receivable
 - Accounts Payable
 - Balance sheet including assets and liabilities
 - Statement of Income
 - Aged invoice listing
 - General ledger
 - Monthly check register

- Resident Accounts
- Monthly maintenance report

FISCAL COMPLIANCE

- All bookkeeping and financial reporting for EHM managed facilities is completed by the corporate office in North Haven. A full accounting of financial status and activity on a monthly basis is sent to the owner/sponsor, the Administrator and the Regional Manager. All accounts for facilities are held separately in the facility name including checking, reserves, escrows and security deposit accounts.
- An annual independent audit will be arranged with a third party audit firm as approved by the owner.
- Collection of rents and fees handled through a coupon and mailed to a bank lockbox for deposit to the facility operating account.
- The budget is prepared by the Administrator in consultation with the Regional Manager and the corporate office. The budget becomes the basis of the monthly report with variances provided, as well as other reports which may be requested. Regulatory special reports are also produced on the schedule determined by the specific agency.
- Payroll and benefits for site staff are handled by the corporate office according to state and federal guidelines. Fidelity bond and other insurance are held by EHM for the protection of the owner.

PHYSICAL OPERATIONS

- Oversight and planning for long term maintenance of buildings and grounds to ensure the safety, security and well-being of the residents.
- Contracts and bids for on-going services to the facility or for specific one-time projects are handled by the Administrator and/or the Regional Manager, including project scope and will be presented to the owner and/or Regulatory Agency as specified in the Management Agreement.
- Daily attention to the facility mechanical plant and equipment by the Superintendent, focusing on responsible preventive care.
- A work order system to handle repairs and service requests from the residents or regular maintenance in a timely and efficient manner and tracking of continuing

problems.

- Regular cleaning and maintenance of common areas and grounds by staff or oversight of contract services to enhance curb appeal.
- Purchasing of supplies and equipment in conjunction with long term facility goals and asset management.

TRAINING

- In-service training for staff of all levels through workshops, regional meetings and training through outside agencies specializing in the regulated housing industry.
- Professional development is encouraged for site staff where programmatically applicable.

Completed projects of
New Samaritan Corporation

FROST HOMESTEAD APARTMENTS, Waterbury, CT 63 units of family housing, HUD 236/CHFA	Opened 1972
BUTTER BROOK HILL APARTMENTS, New Milford, CT 102 units of elderly, HUD 236 program	Opened 1975
FAITH HOUSE, Salisbury, CT 10 units of family housing built or renovated with donations and the Town of Salisbury	Opened 1976
WELLES COUNTRY VILLAGE, Vernon, CT 100 units of elderly and handicapped, HUD 202/8	Opened 1979
STEVENS WOODS, North Haven, CT 60 units of elderly and handicapped, HUD 202/8	Opened 1980
PEACE DALE HOUSE, S. Kingston, RI 100 units of elderly, HUD 202/8	Opened 1980
HILLTOP HOMES, Rowayton, CT 24 units of elderly, HUD 202/8, DOH HSD Grant	Opened 1979
WESTFIELD VILLAGE, Danielson, CT 43 units, elderly and handicapped, FmHA	Opened 1979
JUNIPER HILL VILLAGE, Storrs, CT Congregate Housing Services Pilot Program 100 units of elderly and handicapped, HUD 202	Opened 1981
HOP RIVER HOMES, Andover, CT 24 units of elderly and handicapped, FmHA	Opened 1981
OGDEN HOUSE, Wilton, CT 85 units of elderly and handicapped, HUD 202	Opened 1982
THE MAPLES, Worthington, MA 12 units of elderly, HUD 202 10 additional units	Opened 1983 Opened 1992
BROAD RIVER HOMES, Norwalk, CT	Opened 1983

49 units of elderly and handicapped, HUD 202 Congregate services provided	
GLEN RIDGE COOPERATIVE, Storrs, CT	Opened 1983
36 units of elderly, limited equity cooperative	II Opened 1988 III Opened 1994
WESTERLEIGH, Farmington, CT	Opened 1984
40 units of elderly and handicapped, HUD 202 20-unit addition in development	
GRACE MEADOWS, Southbury, CT	Opened 1985
24 units of elderly and handicapped, USDA-RD 515, technical assistance	
24 units added USDA-RD	Opened 1993
18-unit addition HUD financing in development	
MISS LAURA M. RAYMOND HOMES, Norwalk, CT	Opened 1988
50 units, elderly and handicapped, HUD 202/8	
STAMFORD CROSS ROAD RESIDENCES, Stamford, CT	Opened 1989
24 units, elderly and handicapped, HUD 202/8	
SULLIVAN-MCKINNEY ELDER HOUSING, Fairfield, CT	Opened 1989
40 units, elderly, converted school, HUD 202	
CHESTNUT GROVE, New Milford, CT	Opened 1990
Construction 1989, 39 units elderly, limited equity condominiums with congregate services, CHFA financed	
SPRUCE BANK FARM ADDITION, Woodbury, CT	Opened 1990
24 units, low/moderate income elderly, USDA-RD 515 financing, rental with some subsidy	
24 addtn'l units, technical assistance provided	Opened 1995
12-unit addition HUD 202 financing	Opened 2003
SCHOOLHOUSE APARTMENTS, New Canaan, CT	Opened 1992
44-unit rehab of a school leased by the town, HUD 202 financing, Section 8 rental subsidy, very low-income elderly and handicapped.	
MANSFIELD CENTER FOR NURSING and REHAB, Storrs, CT	Opened 1994
A 98-bed skilled and subacute nursing and rehabilitation center, adjacent to Juniper Hill and Glen Ridge.	

KUGEMAN VILLAGE, Cornwall, CT 18 units, low/moderate family housing, CT DECD, under construction; and 7 units, owner-built Land Trust homes	Opened 1994
GLEN AYRE, New Milford, CT 51 units, HUD Section 202 with PRAC, for very low-income elderly	Opened 1994
WOLCOTT HILLS, Wolcott, CT 118 units of limited-equity home ownership on CT DECD Land Trust, a joint venture with private developer to build 2 and 3 bedroom homes for first-time home buyers.	1995 and 1996
THE SAUGATUCK, Westport, CT 36 units of limited-equity cooperative for 20% low and 80% moderate income elderly, to rehab a school leased by the Town to the cooperative, financing by CHFA and Housing Development Corporation of Lower Fairfield Co.	Opened 1996
WOODSIDE HEIGHTS, Middlebury, CT 71 units construction for very low-income elderly, HUD Section 202/PRAC subsidy	Opened 1996
POMFRET CONGREGATE HOUSING AND SENIOR CENTER 30 units of DECD Congregate housing for seniors with a senior center	Opened 1997
CHESTNUT HILL, Wolcott, CT 40 units of HUD 202/PRAC housing for very low-income elderly	Opened 1997
HILL HOUSE, Greenwich, CT Technical assistance, building a new congregate facility 38 units with DECD financing	Opened 1998
WOODS EDGE, NORTH HAVEN, CT 40 units of housing for very low-income elders, under HUD 202/PRAC	Opened 6/1999
RICHARD STREET COOPERATIVE, New Haven, CT 20 units of family leasehold cooperative in 8 rehabbed buildings, with Tax Credit financing	Opened 9/1999
ORFORD VILLAGE COMMONS, Manchester, CT 40 units of housing for very low-income elders, HUD 202/PRAC financed	Opened 9/1999

SOUTH AVENUE COTTAGE, New Canaan, CT 6 units of HUD 811 housing for developmentally disabled	Opened 10/2000
BERNHARDT MEADOW, Roxbury, CT 18 units of HUD 202/PRAC housing for elders	Opened 3/2002
THE EVERGREENS AT THOMPSON WAY, Burlington, CT 24 units of Town Senior Housing, technical assistance	Opened 2003
ADDITION TO WESTERLEIGH, Farmington, CT 20-unit addition, HUD 202/PRAC elderly	Opened 2002
ADDITION TO SPRUCE BANK FARM, Woodbury, CT 12-unit addition, HUD 202/PRAC elderly	Opened 2003
WINDING RIVER VILLAGE, Tolland, CT 36-unit HUD 202 low income elderly with PRAC subsidy	Opened 2003
THE RIPTON, Shelton, CT 36 units of HUD 202 housing for low income elders	Opened 2003
LAUREL RIDGE, Wolcott, CT 40 units of HUD 202 housing for low income elders	Opened 2003
OAK VIEW, North Haven, CT 48 units of HUD 202 housing for low income elders	Opened 2003
SUMMERDALE, NHOAH, North Haven, CT 20 condominium units of 2 or 3 bedrooms developed by a coalition of churches for low income families, technical assistance	Opened 2003
GRACE CONGREGATE HOUSING, Waterbury, CT 40 units of HUD 202/PRAC housing for elders, sponsored by Grace Baptist Church, technical assistance	Opened 2004
ADDITON #4 to GRACE MEADOWS (POMPERAUG), Southbury, CT 22 additional units of HUD 202/PRAC housing for elders	Opened 2004
HALLOCK'S LANDING (Lincoln School) Derby, CT 34 units of HUD 202 housing for low income elders	Opened 2006
MEADOW VIEW, Newington, CT 32 units of HUD 202 housing for low income elders	Opened 2012

BONNEY BROOK, Cornwall Bridge, CT

Opened 2014

10 units of HUD 202 housing for low income elders

NEW SAMARITAN PARKVILLE, Hartford, CT

Opened June 2024

22 units of mixed use HUD 202PRAC housing for low income elders

**NEW SAMARITAN CORPORATION
NEW SAMARITAN DEVELOPMENT CORPORATION
ELDERLY HOUSING MANAGEMENT, INC.
BOARD OF DIRECTORS**

Officers/Directors:

Jennifer Young Gaudet, Chair of the Board
C. Michael Tucker, Vice Chair
Barbara J. Libby, Secretary
Mabel M. Peterson, Assistant Secretary
Jeffrey A. Asher, Treasurer
Melanie J. Howlett, Assistant Treasurer

Directors:

Betsey M. Reid, Director Emerita
Robert A. Biddleman
Maria A. Borges Correia
Joseph A. Tobin
Scott Morrow
Anthony Macleod

KEY EMPLOYEES

President and Chief Executive Officer

Kelly McDermott

BA in Social Work from Central CT State University. She was the Habitat for Humanity Campus Chapter President and was recognized by the College as Volunteer of the year. Kelly has served in the positions of Interim Managing Director of Multifamily Housing at the CT Housing Finance Authority; Executive Director at the Wallingford Housing Authority; Director of Planning & Modernization at the East Hartford Housing Authority; and held a number of leadership positions at the City of Bridgeport and Town of Stratford. Ms. McDermott has demonstrated expertise in effecting change in complex and underperforming programs as well as driving successful implementation of projects funded by a federal, state, and local funding sources. In 2015, she was named Developer of Year by the CT Housing Coalition.

Ms. McDermott believes housing is a basic human right, and has dedicated her professional career to advocating for and creating housing opportunities for individuals and families. She is a passionate, thoughtful, results driven leader in the housing and community

development field, with a track record of success in directing and managing administrative and operational departments, including managing financial assets, physical assets and human capital. Outside of her career, she enjoys hiking, and has summited some of the largest mountains in the US, the Incan Trail and Mount Kilimanjaro. Beyond that, you can find her spending time quilting, singing with the Greater Middletown Chorale and volunteering in her community.

First Employed with NSC/EHM: 2023

Chief Operating Officer

Sophia Rosa

BS degree in Hospitality Management from Johnson & Wales University in Providence, RI. Since her start in the affordable housing industry nearly ten years ago, her passion has always been to develop and sustain quality housing for all. More recently, she served as Assistant Director at the Wallingford Housing Authority and North Haven Housing Authority where she was responsible for overseeing daily operations as well as managing all grant-related projects for the agency. With experience in both HCV and HUD Multifamily Housing Programs, she was successful in expanding their federal housing subsidy portfolio by implementing both a Project-Based Voucher and Section 811 Program prior to her leadership position. She currently holds a Certified Occupancy Specialist license through NCHM, and has received numerous Fair Housing & Reasonable Accommodation training through Nan-Mckay and Conn-Nahro.

Sophia is an active member of the CT Chapter of the National Association of Housing and Redevelopment Officials (CONN-NAHRO) where she sits on the scholarship committee.

First Employed with NSC/EHM: 2023

Comptroller / Director of Finance

Sabine E. Cox

Mrs. Cox's career with New Samaritan, Elderly Housing Management and New Samaritan Development Corp. started in 1988 where she began a successful journey of institutional and regulatory knowledge that currently spans for 35 years of contributions to the various companies. Her progressive roles and promotions through various accounting positions, including her latest promotion to Comptroller/Director of Finance in May 2023, Accounting Director, Property Accounting Manager, Accounting Supervisor, and Accounting Assistant. Mrs. Cox has successfully completed various courses in regulatory compliance for Rural Development and HUD and has also completed the requirements for Certified Occupancy Specialist. In her role as Accounting Director she oversaw the financial and payroll departments. In her role as Property Accounting Manager, she oversaw the timely and accurate provision of financial data to a portfolio of sites that ranged from 50 to 100,

including the direct supervision of an accounting staff of 8 to 15 individuals. Mrs. Cox's accounting knowledge spans both her coursework at Southern CT State University and an expansive array of regulatory and compliance in the property management field. Her promotion to Comptroller involves oversight of both the Property accounting and Corporate accounting areas. Her time outside of NSC/EHM includes her family and three children.

First Employed with NSC/EHM: 1988



5 Canton Road: Affordable Housing Proposal

Conversion of Former F.M. Kearns Primary School to Affordable Housing

PROJECT VISION

As the population of CT ages, it is important for developers to consider design elements that promote accessibility and safe spaces that allow seniors to age in place and live independently and with dignity. Creating intentionally designed spaces that allow for 100% accessibility, include elements such as wider doorways, walk-in showers, lever-style door handles, and modern window technology are of high importance when working with this population.

New Samaritan believes in fostering vibrant and thriving communities by delivering comprehensive service coordination, promoting well-being and ensuring access to essential services for all residents. Our Elderly Housing Management Division has a dedicated Resident Services department and extensive experience in enriching the lives of individuals in our 63 managed communities. And finally, to promote active lifestyles and continued connection to nature and elements, New Samaritan would look to develop a design concept that encourages natural light, interior courtyard gardens, and walking paths around the building.

This site fits well with the HUD 202 funding program, a competitive funding process where HUD provides interest-free capital advances to private, nonprofit sponsors to finance the development of supportive housing for the elderly. The capital advance does not have to be repaid as long as the project serves very low-income elderly persons for 40 years. Project rental assistance funds are provided to cover the difference between the HUD-approved operating cost for the project and the tenants' contribution towards rent. Project rental assistance contracts are approved initially for 3 years and are renewable based on the availability of funds.

If selected under this RFP, New Samaritan would immediately seek predevelopment funding through the CT Department of Housing to complete additional due diligence work. The Town has provided important items including an appraisal, existing building plans and specifications and evidence of community support, however, our team would need to complete a few additional reports to drill down further on the financial feasibility of a renovation project. This includes environmental reports as well as architectural design conceptualization and cost analysis, and zoning process review.

DEVELOPMENT COSTS AND TIMELINE

While New Samaritan is unsure if the HUD 202 funding program will continue to be available in the upcoming year, using information from the last funding round, the total cost allowed per one bedroom unit land at approximately \$250,000 per unit. If the building were to be converted into 40 units that would make it eligible for \$10,000,000 in Capital Advance dollars. With average per unit rehabilitation costs in CT coming in around \$300,000 per unit, our hard cost projection is 12,000,000. An additional \$4 million would need to be raised for this project, potential through state funding sources. See

sources and uses below. NSC has assumed the Town's contribution to this project would be a minimal acquisition fee.

STATEMENT OF SOURCES	AMOUNT
HUD 202 Capital Advance	\$10,000,000
DOH Capital Grant	\$5,200,000
HTCC Application	\$500,000
Total Sources	\$ 16,200,000

STATEMENT OF USES	AMOUNT
Construction Hard Costs	\$12,000,000
Construction Contingency	\$1,200,000
Architectural/Engineering	\$750,000
Soft Costs (Fees and expenses)	\$950,000
Developer fee	\$1,200,000
Site Acquisition	\$100,000
Total Uses	\$16,200,000

The overall redevelopment proposal will be implemented over the next 18-24 months. NSC Team members would be working to expand our development team to include Architectural and Engineering partners as well as working towards securing financing for both predevelopment and rehabilitation activities. Our team anticipates that if there is interest from the State in moving this project forward, predevelopment funding would become available by January 2025. Due diligence, site design and financial feasibility would be completed with the goal of submitting an application under the Fall 2025 Developer Engagement Process with the CT Department of Housing as well as submission of a HUD 202 funding application in the Fall 2025 round. Typically funding awards would be made in Spring 2026 and the project would go out to bid, with an anticipated construction start date of Summer 2026.

REFERENCES

Naren Dhamodharan

President

Hampden Park Capital & Consulting

413.636.9616

Paul H. Selnau, AIA, SPHC ©

Architect / Vice President
Schadler Selnau Associates, p.c.
860.677.9620

Susan Piacentini
Field Office Director, HUD CT Office
860.240.9702

An outline was provided to both 7 Summits Realty and New Samaritan with items to cover during the presentation to the Board. While the outlines are similar, there were minor differences and items for clarification in response to the proposals received. Since issuing these outlines, 7 Summits Realty and New Samaritan have decided to partner on the project and will be presenting to the Board together.

7 Summits Realty, LLC

Kearns RFP Formal Interview Format

Introduction

Background of firm and personnel to be involved in project, including other housing developments that have been completed

Proposal for 5 Canton Road, Kearns School

Overall site layout and building(s) – Rendering of building and conceptual site plan are helpful

Building footprint/parking layout

Other site amenities (gardens, walking trail, pond, courtyard, etc.)

Building Description

Renovate vs. demolish and build new

Number of proposed stories. It is noted three story buildings are proposed, please provide information if a two-story building is feasible.

Number of units

Details about accessibility / design of the units and the building(s), including information about sustainability and energy source to power them

Information about any community spaces in the building

Occupants / Unit restrictions

Senior (specify the age) or mixed ages proposed

Proposed unit affordability: provide information about the proposed number of units at each AMI level. Specifically, please provide a chart showing the rent, bedroom count, and square footage for the apartments proposed.

Please explain why the difference between the market rate one-bedroom apartment (\$1,392) and the one-bedroom apartment at 60% AMI (\$1,371) is so little.

Operations

Describe how property maintenance would be handled

Describe if any support services or other services would be provided on site

Other

Provide information if the project will be phased

Provide information if any consideration has been given to the west side of the property and development potential

Financial / Pro Forma

Provide overview of total proposed budget for the project, including funding sources

Provide details if firm has experience obtaining funding and if so, from what sources.

In budget, include if there is a proposed purchase price for the property.

Provide information about any financial assistance requested from the Town, including the following:

Building permit fee reduction or waiver

Sewer connection permit reduction or waiver

Tax abatement

Other

Town Assistance

Describe what would be expected from the Town, if anything, during the following phases:

Pre-development / permitting phase

Development / construction

Post development / operational

Questions / Other Information

Does the proposer have any specific questions for the Town?

Does the Town have any questions for the proposer?

New Samaritan

Kearns RFP Formal Interview Format

Introduction

- Background of firm and personnel to be involved in project, including other housing developments that have been completed

Proposal for 5 Canton Road, Kearns School

Overall site layout and building(s) – Rendering of building and conceptual site plan are helpful

Building footprint/parking layout

Other site amenities (gardens, walking trail, pond, courtyard, etc.)

Building Description

Renovate vs. demolish and build new

Number of proposed stories

Number of units

Details about accessibility / design of the units and the building(s), including information about sustainability and energy source to power them

Information about any community spaces in the building

Occupants / Unit restrictions

Senior (specify the age) or mixed ages proposed

Proposed unit affordability: provide information about the proposed number of units at each AMI level. Specifically, please provide a chart showing the rent, bedroom count, and square footage for the apartments proposed.

Operations

Describe how property maintenance would be handled

Describe if any support services or other services would be provided on site

Other

Provide information if the project will be phased

Provide information if any consideration has been given to the west side of the property and development potential

Financial / Pro Forma

Provide overview of total proposed budget for the project, including funding sources

Provide details if firm has experience obtaining funding and if so, from what sources.

In budget, include if there is a proposed purchase price for the property.

Provide information about any financial assistance requested from the Town, including the following:

Building permit fee reduction or waiver

Sewer connection permit reduction or waiver

Tax abatement

Other

Town Assistance

Describe what would be expected from the Town, if anything, during the following phases:

Pre-development / permitting phase

Development / construction

Post development / operational

Questions / Other Information

Does the proposer have any specific questions for the Town?

Does the Town have any questions for the proposer?

Town of Granby
Attn: Abby Kenyon
5 Canton Road
Kearns School, RFP
15 North Granby Rd
Granby, CT 06053

Dear Ms Kenyon,

Thank you for the opportunity to submit an RFP on the Kearns School. We've built and manage many retirement communities in the area and we've always built them from scratch. We would purchase the land, clear the land, do the site work and build our specialty senior living communities. We've recently been eyeing school re-development projects for some time and have evaluated a few thus far, so your timing on this when you originally reached out to me couldn't be better.

Please find herewith our proposal to convert the Kearns School into a mix of affordable (those age 55 and over) and market rate housing and develop the old school site into a new, modern, green, carbon neutral and desirable, active and attractive lifestyle, recreation and retirement asset for the community. This will be a transformational change from a run-down school that is no longer maintained and an eyesore to the community to a vibrant new source of life for the community and hopefully a signature property of the town. As you'll soon see, our plan will enhance the social, financial, lifestyle, recreational, aesthetic and development interests of the community.

We'll apply for all land use approvals as well as any other municipal and state permits to develop the site. We've undergone a preliminary review on the project concerning condition, environmental, zoning, legal, financing and development issues. We'll continue to work with the town to get through these on a very granular basis if we're awarded the RFP.

If we're awarded the RFP, we would like to enter into a purchase and sale agreement for this property. We do not need nor are we asking the town for financing. If our RFP is selected, we'll create a new entity called the Kearns Street School Active Adult Community, LLC, to be the entity that purchases and develops the property from the town as illustrated in this document. The ownership structure of said entity will be 50% Tim Bobroske and 50% Mike Chadwick.

Here are address and contact details of the principals, as requested by the RFP:

- Tim Bobroske, 141 Burlington Road Harwinton, CT 06791,
timbobroske@gmail.com office = 860-283-8000, cell= 860-402-6842
- Mike Chadwick, 28 Jefferson Hill Rd S Litchfield, CT 06759,
mike@fiscalwisdom.com, office =860-673-1942, cell= 860-480-0861

Resume, Tim Bobroske

Tim Bobroske, and his wife Lynn, own Bobroske Construction, a minority owned company established in 1976. Tim's been a commissioner of the inland wetlands committee in Harwinton for over 19 years. Tim's been a member of the board of finance in Harwinton for over a decade. Attached to this RFP is our Supplier Diversity Program certificate from the State of Connecticut showing our status as a minority owned business. We've done residential and commercial building and have for the past 34 years. We concentrate on active adult housing and independent living for people over age 55. We specialize in using the guidelines of the HUD fair housing act to build active retirement communities. Over the years we've built hundreds of buildings ranging from residential to commercial and everything in between. Tim is certified age in place specialist from the national association of homebuilders.

As time has unfolded, we've found ourselves specializing in and loving active adult communities, so this is now the sole focus of our business, we no longer build anything else. We've designed, built, own and manage four local active adult retirement communities in the area. Please feel free to learn more about our projects at www.seniorhousingct.com. We'd welcome setting up a tour of our communities to show you exactly what we build to give you an intimate look at the quality, feel and atmosphere of our communities. We build to keep and run the communities as forever assets, we do not use contractor grade material, and we do not build to flip.

Attached below also please find four reference letters of support in each of the towns where we've built and manage active retirement communities. The letters come from the First Selectmen of Thomaston and New Hartford as well as the Mayors of Terryville and Wolcott, demonstrating our relationships with these towns as we've worked with them for decades in building and managing the current retirement communities we already run and manage. They'd be happy to speak with or meet with any or all members of the committee

responsible for the decisions on the Kearns Street School to see how we enhance the communities we work in.

Michael E. Chadwick, CFP, ChFC, CLU
61 Maple Ave
Canton, CT 06019
mike@fiscalwisdom.com

PROFILE

CEO, Financial Services Executive, Board Director and Principal, with three decades of experience developing and selling numerous companies in the capital markets industry. Proven success consulting with hundreds of firms, advising them on growth strategies, reorganization, buyouts and acquisitions. Adept at developing cultures that practice open architecture and are designed to offer a professional, personalized consultative atmosphere, with an unbiased perspective, to several hundred families, individuals and organizations. Broad-based expertise includes strategic and retirement planning, business consulting, investment strategy, real estate development and funding, capital markets, insurance platform development, new business development, process improvements, budget management, research, M&A transactions, fiduciary oversight and corporate governance. Dedicated to building effective relationships and providing crucial support to stakeholders, executive teams and boards.

EXPERIENCE

FISCAL WISDOM WEALTH MANAGEMENT, Canton, Thomaston, CT, Atlanta, GA
1994 - Present

A financial advisory firm for families, individuals and organizations

Chief Executive Officer and Principal

Assisted hundreds of families, businesses, charities and pension funds work towards reaching their goals

- Took a forward-thinking approach to help clients protect their assets for years to come
- Consulted for Yale's Entrepreneurial Society and the University of Connecticut Technology Incubation Program Services (TIPS)
- Currently securing an M&A deal between Portsmouth and Arete Wealth Management

- Built multiple firms (Chadwick Financial, Portsmouth Smartlife Financial, Fiscal Wisdom Wealth Management and Portsmouth) into billion-dollar organizations
- Succeeded a college friend's firm when he passed (Place Financial Advisors), acquired and integrated it into Chadwick Financial Advisors, took on its several hundred clients and ensured the wife and children were financially set for life while retaining business continuity and financial success
- Managed the sales a client's business to a public company for \$24M
- Sold a division of Chadwick Financial Advisors, at favorable price, to Upstate Financial Network

Teaching Assignments: Taught business and finance related curriculum at University of Connecticut, University of Connecticut School of Medicine, Yale Medical School and Trinity College

PROFESSIONAL

Board Director, Various Organizations

Guest Contributor on Fox Business News, Wall Street Journal, CNBC, Bloomberg, Bloomberg Radio, BNTV, CNN, Fox News, CBS, ABC, NBC, Newsmax

Former Consultant, Yale's Entrepreneurial Society Former Consultant, University of Connecticut Technology Incubation Program Services (TIPS)

EDUCATION

Bachelor of General Studies, 1994 University of Connecticut, Storrs, CT

Certified Financial Planner (CFP®)

Chartered Financial Consultant (ChFC)

Chartered Life Underwriter (CLU)

Our project team will consist of the following people in addition to Tim & Mike, that will work with the town.

Todd Clark, land surveyor 126 Tunxis Road Bristol, CT 06010

Wayne Zirolli, PE, LS 404 Beach St Litchfield, CT 06759

Clint Webb, C. Webb & Associates, LLC Pine Meadow, CT Environmental Consultant

Michael Lambert, P.E, Storm Water Management

Ashley Clark Kidd, Blue Moon Collaborative Architectural, 171 Central St Bristol, CT 06010

Mark Ziogas, Land Use Attorney – 88 Valley Street Bristol, CT 06010

Matt Szydlo, Structural Engineer, 114 Scoville Hill Rd Harwinton, CT 06791

404 Beach Street Phone-mobile: 203-525-4473
Litchfield, CT 06759-2314 Email: wjzengineering@optimum.net

Wayne J. Zirolli, P.E. & L.S.

Summary of Qualifications

2002 – Licensed as a Civil Engineer – State of Connecticut

1984 - Licensed as a Land Surveyor – State of Connecticut

Education

1969 – 1973 Southern Connecticut State University New Haven, CT
Bachelor of Science Degree/Biology – Aquatic concentration

Professional CT Experience

2021 – Current Wayne J. Zirolli, P.E. & L.S. (self-employed) Litchfield,

Civil Engineer & Land Surveyor

2009 – 2021 Borough of Naugatuck Engineer Naugatuck, CT
Civil Engineer & Land Surveyor

Department head, responsible for engineering projects (including surveying), Project Grant applications and project management, Borough, stormwater and drainage concerns. Manager of department staff; stormwater coordinator; liaison to other Borough departments. Responsible for engineering review of application submissions to land use boards, preparation of reports and attendance of meetings for Inland Wetlands, Planning, and Zoning commissions. Work closely with the Director of Public Works, the Land Use department and the Borough Attorney. Provide services as required for the mayor's office, assessor's department, other town hall departments including, fire and police departments. Involved in Brownfields Assessment process.

2008 – 2009 Borough of Naugatuck Assistant Engineer Naugatuck, CT
Civil Engineer & Land Surveyor

Assistant to the Borough Engineer, responsible for a variety of Borough projects, stormwater and drainage concerns, aid in managing department staff, acting as liaison to other Borough departments.

2004 – 2008 Wayne J. Zirolli, P.E. & L.S. (self-employed) Naugatuck, CT

CT

Civil Engineer & Land Surveyor

Proprietor of a private practice, full service civil engineering and land surveying office

1986 – 2004 L. Edwards Associates (minor partner) Easton, CT

Land Surveyor & Civil Engineer

In charge of survey field crews, map computations and records research, assisted in engineering design of subdivisions, roads, septic systems and drainage.

Became licensed as a civil engineer while at firm.

1985 – 1986 Greiner, Inc. Wallingford,

Survey Supervisor

In charge of survey field crews, map computations and records research.

1984 – 1985 Arthur E. Barden Land Surveyors Clinton, CT

Land Surveyor

Survey crew chief, with inside work, including drafting & computations and records research.

1983 – 1984 White-Somers & Associates Oxford, CT

Land Surveyor

Survey crew chief, with some inside work and engineering experience.

Became licensed as a land surveyor while at firm.

1978 – 1983 Spath-Bjorklund Associates Monroe, CT

Survey Technician

Survey crew chief, with some inside work, soil testing and engineering experience.

1973 – 1978 Anderson Associates Guilford, CT

Survey Technician

Served on survey field crew, progressing to crew chief with some inside work and soil testing for residential development.

1971 – 1972 Anderson Associates Guilford, CT

Survey Technician - (summer work)

Served on survey field crew as a rod man & instrument man trainee.

1969 – 1970 Cahn Engineers New Haven, CT

Surveyor Technician – entry level (summer work)

Served on survey field crew as a rod man trainee.

**Additional
Professional
Activities**

Past President of the Connecticut Association of Land Surveyors

Past President of the Surveyors Proprietors Council - South Central, Inc.

Professional Memberships

Firm Member – Connecticut Association of Land Surveyors

Member of the Surveyors Proprietors Council – South Central, Inc.

Community CT Activities

Former Chairman of the Architectural Review Board – Borough of Naugatuck,

Member of the Naugatuck Community Band

Member of the First Congregational Church of Torrington

Ashely Kidd Bio

Blue Moon Collaborative – Profile

Blue Moon Collaborative has been providing Architecture & Design services since 1991. The firm prides itself in providing approachable and realistic Architectural plans. With attainable designs that are best suited to our client's specific needs. Blue Moon has worked side by side with Tim Bobroske Companies for more than 15 years designing many traditional "New England" style multi-family projects. Projects that have adapted with modern conveniences, and feedback from tenants and stood the test of time. Blue Moon Collaborative is a primarily residential design firm, focusing on highly functional and livable spaces.

Ashley (Clark) Kidd is a Residential Designer who comes from a diverse background in Hospitality & Business. Before turning to design, Ashley worked in the wedding industry. Through helping many couples plan and design their big day, she decided to make the switch to something longer lasting (beyond one magical day), designing homes and spaces that could be enjoyed everyday. Ashley's passions lie with establishing strong relationships with those around her. Listening and understanding clients is the basis for a great working relationship and Ashley strives to build and maintain those relationships with each client.

MARK ZIOGAS
ATTORNEY AT LAW
88 VALLEY STREET 2ND FLOOR
P.O. BOX 1197, BRISTOL, CT 06011-1197
mziogas@csmpzllc.com

Phone (860) 589-4121

FAX (860) 589-4966

FIRM RESUME

Mark Ziogas

Education:	Springfield College, 1979 B.A.
	Western New England College School of Law, 1982 J.D.
	New York University, 1983 LL.M.
Admitted to Bar:	Massachusetts 1982
	Connecticut 1983
	U.S. District Court for Connecticut, 1984

A General Practice lawyer in Bristol CT since 1984 with an emphasis on real estate matters, zoning, small business, probate and wills

Approved attorneys for the following title insurance company: Connecticut Attorneys Title Insurance Company,

References: Available upon request.

Here are the pertinent developments we've completed that will show our expertise in the area of active adult communities. We've designed and built four local active adult communities, they include Quail Hollow Village in Terryville, Thomaston Valley Village in Thomaston, The Residence of Stone Ridge in Wolcott and Canterbury Village in New Hartford. Quail Hollow in Terryville is a 78-unit retirement community we built from scratch, which has community gardens, a pond and a walking trail. Thomaston Valley Village is a 58-unit retirement community we also built from scratch, and it includes a pond with a walking trail around it, gardens, tenant garages, and a community gathering center for community activities and recreation. Stone Ridge is an 18-unit retirement community where we're currently adding 43 more units to it that are under construction right now, which also has gardens and two storm retention ponds for stormwater management as well as additional natural habitat for animals and walking trails. Canterbury Village in New Hartford is a 24-unit retirement community with gardens and is located adjacent to the Farmington River walking trail and access to fishing and tubing on the river. We're currently working through zoning in New Hartford for a 7 phase, 320 unit addition to this retirement community. This will become our signature property, and this development will be built to include many gardens, a pond, walking trails, a community room, and a 15,000 square foot grand Lodge for events and parties for community members exclusively.

Each of the communities has additional lighting, levered doorknobs, enlarged bathrooms with grab bars, single lever faucets, raised toilets and raised electrical outlets. We try to have no step entries and we're incorporating smart home technology on all of our communities. All of these amenities are appreciated by our senior clientele.

Our vision for the Kearns School is for a complete transformation from a lovely elementary school in town to a new, modern, green, carbon neutral and active adult lifestyle community. Our renderings are attached as part of the RFP and here is our vision for the new Kearns School Active Adult Community.

We'll leave the existing footprint and buildings alone, but we'll make them two story buildings instead of one, and the apartments will be on the 1st floor and 2nd floor and we'll completely change the look and feel of the building, transforming it from a cute traditional old school to a gorgeous, modern, retirement community while keeping certain aspects of the school alive and tying in the schools history.

The buildings will be remodeled with high quality materials, and we'll be using natural wood, cement and vinyl siding and real stone to put a very elegant look on the property, as the drawings illustrate. We're proposing a 60 unit apartment complex that will be roughly 85,000 square feet total. This could grow to 66 units as we complete our due diligence. We're allocating 40% of the units to be affordable and the balance of 60% of the units will be market

rate units. We are using our affordable rent numbers directly from the Town of Granby's Affordable Housing Plan, published June 2022. We'll offer a mix of unit sizes, here is a breakdown of what we're visioning:

Unit Description	Affordable Rent	Market Rent
• 4, 2 bedroom units @1492 square feet	\$1877/m	\$3000/m
• 3, 1 bedroom units @ 1453 square feet		\$2200/m
• 17, 2 bedroom units @ 1095 square feet	\$1877/m	\$2700/m
• 7, 1 bedroom units @ 1097 square feet	\$1668/m	\$1950/m
• 24, 1 bedroom units @ 721-742 square feet	\$1668/m	\$1950/m
• 1 studio unit @ 459 square feet		\$1000/m
• 4, 2 bedroom units at 1331-1334 square feet	\$1877/m	\$2700/m

The buildings will have porches, a cupola (bell tower) with a functioning school bell in it that'll be used to communicate with the residents of special events, holidays and parties. The school as it is today has a plethora of wonderful art in the hallways that was done by teachers and students. All of this art will be preserved and showcased, to give everyone the chance to enjoy and relive all of the happy memories that were created over the tenure of the schools history. Our plan is to take each art installation and frame it with an elegant custom wood frame, backlighting and special sign to be built at each art installation, that will showcase the teacher, artists, the class participants and the messaging that particular piece of art is conveying along with what was happening in town when it was created. This will be unlike any other apartment building we're aware of, where residents can live in a place that they or relatives may have gone to school at as a child and relive wonderful memories that have been memorialized on the walls of the school through art. A few pictures of the art are attached with in the RFP for those who haven't had the luxury of seeing them, they're truly magical.

We'll theme the entire complex school based to wrap the fact that it is a former school into the new active adult lifestyle community. The front office will be the "Headmasters Office", the maintenance department will be "Custodians", the athletic facilities will be run by the "Athletic Director", the kids will have an actual, real life, labeled "Playground", while the medical supplies will be stored in the "Nursing Station" and the Maintenance Barns will be called "Agricultural Buildings" It'll not only be beautiful and attractive, but it'll be fun with a flavor of all things school in as many areas as we can implement. Our buildings will be built with the following:

- Smart home technology, including smoke alarms, fire alarm systems, keyless locks and fall detection systems in the event one of our residents falls down accidentally so it'll provide a layer of protection for our residents.
- We'll have no step entries and elevators to get to the 2nd floor units so everyone will be able to traverse about the property regardless of their level of mobility. The existing hallways are massive and will remain that size to accommodate any transportation that our residents may need from walkers to wheelchairs and anything in between.
- We're aware that of the 33.8 acres that approximately 21 acres of them are designated wetlands areas. We'll work with inland wetlands to get the appropriate permits and permissions to build our pond and walkway around the pond as part of our overall development strategy. Under Town of Granby Inland Wetlands and Watercourses Regulations July 11, 2018, we would be applying for a pond to support aquatic, plant or animal life and habitats and it'll assist in water drainage. This will help to prevent flooding, stabilize the supply water and cleanse the flow of the stream of any sediment or pollutants into our retention pond. We and our soil scientist believe the wetlands will be enhanced by a water retention and cleansing feature, flow control and wildlife habitat. If your inland wetlands board agrees, by adding this feature, the community will get the added benefit of a beautiful place for everyone to enjoy. We'll subsequently build boardwalk style walking trails around the pond over wetland areas and then groomed pathways along dry areas, as appropriate. This is a signature element of our communities and one that is truly loved by everyone who lives in and visits them.
- We'll build pickleball courts for the residents and have outdoor picnic tables with a grilling station and outdoor kitchen under a pavilion for residents to enjoy the beautiful landscaping and gardens.
- We'll offer storage buildings for those with additional belongings that cannot fit into their apartments. There will be an additional charge for this amenity for those who choose to take advantage of it.
- We'll have electric charging stations in some parking spots and overall, we'll be asking the town for permission to have a total of 139 parking spaces. We'll renovate the existing parking lot and expand the smaller one to wrap around the building and add another in between them in the rear section of the buildings. They'll all be connected and will have some equipment and community buildings attached to them.

We're expecting the following cost and timeline to get the job done. If awarded the RFP, we'll immediately begin working with the town and state to acquire all of the necessary permits to make the development happen. It'll start with our soil scientists and the town's inland wetlands board, then onto each of the other boards and committees in town as appropriate. We expect this process to take about one year from beginning to end to get through permitting and processing. Once we've got all of the necessary approvals in place, we'll begin construction. We expect the permitting and processing phase to cost roughly \$200,000.00 with all of the necessary experts to design and draft the actual complex we'll build and gain the necessary permits to construct it. Once permitting is secure we'll begin demolition and site work for the change from the existing structure to the new apartment complex, complete with all amenities. We expect this phase of the project to cost \$700,000.00 and we expect this phase of the process to take 3-4 months. Once site work and demolition are complete, we'll begin the rebuilding, construction and renovation phase of the project where the buildings will come to life. We expect this portion of the project to be the longest, lasting 10-14 months. We anticipate the full project to take 18-24 months to complete once we've acquired all of the necessary permits and permissions. Our budget for the overall project is \$10 million dollars. From a financial perspective, we have ample current equity to fund the project, but we'll be working with our team of bankers to fund the project with financing from a combination of a bank and CHFA. CHFA will fund us at \$125,000.00 per affordable housing unit, through the Build Connecticut program, and it applies towards workforce and retirement housing. The rest will be personal equity and traditional bank financing. We've done many of these projects before and have deep, long-term well-established relationships with the appropriate parties to carry out this plan. We also have access to capital markets if they prove to be a more efficient method of financing the project through completion.

We propose a purchase price of the property of \$25,000.00 from our entity to the town to secure property and give us the green light to start the initial phase of the project in permitting and permissions, subject to all approvals. Once the initial transaction is complete, we'll then begin bringing in the team and investing as necessary to get the necessary permits and permissions to get project underway.

We would request a tax abatement on the project that would include the following:

No property taxes for years 1-3 as we build and stabilize the property, then a fixed annual tax bill of \$20,000 in years 4-10, \$30,000 in years 11-15, then a market rate level of taxation thereafter.

We're aware of, and comfortable with, the sewer easement to an abutting property owner that will come with the property. We ask that after our soil scientists work with the town for

the pond application, if we find that the wetlands area is less than currently marked, we be advanced a permit to build more apartments, with the same density as the school conversion, on the land that is found to be buildable and not wetlands, accessible from the far side of Burleigh Drive off of the property on what we believe will be the other side of the actual wetlands. If this materializes, this is something we'll build later, and it will not get in the way of the current redevelopment of the school.

Phase 1 and hazmat we know are not done. We'd request that this be completed by the town prior to transfer, and we'll help with the process using our contacts and connections. We request that at time of transfer the property is free of any contamination and is green lighted from an environmental perspective. We're aware of, and will help the town with securing grants to make this happen.

We would remain not only the developers, but the long term owners and operators of the project and would add this asset to our existing portfolio of properties. It is in a great geography and close to our other holdings to make it a very efficient and attractive asset for us.

Thank you very much for this opportunity, your time and consideration. Should you have any questions or request additional information, please never hesitate to reach out to us anytime.

Best Regards,

Tim Bobroske

Mike Chadwick





















3

ANDERSON
SHOES



PRICE
SALE

NO. 100
MOVED
TO FINE



SNOWB CONES



ANDERSON SHOES



1/2 PRICE
SALE



Affordable Housing Plan

Town of Granby



June 2022

Granby, Connecticut

General

ACS, 2018–2022	Granby	State
Current Population	10,972	3,611,317
Land Area <i>mi</i> ²	41	4,842
Population Density <i>people per mi</i> ²	270	746
Number of Households	4,277	1,409,807
Median Age	46	41
Median Household Income	\$116,023	\$90,213
Poverty Rate	3%	10%

Economy

Top Industries

Lightcast, 2022 (2 and 3 digit NAICS)	Jobs	Share of Industry
1 Agriculture, Forestry & Hunting	489	
<i>Crop Production</i>		98%
2 Construction	434	
<i>Specialty Trade Contractors</i>		79%
3 Health Care and Social Assistance	385	
<i>Ambulatory Health Care Services</i>		48%
4 Retail Trade	342	
<i>Food and Beverage Stores</i>		56%
5 Accommodation and Food Services	224	
<i>Food Services and Drinking Places</i>		94%
Total Jobs, All Industries	2,930	

SOTS Business Registrations

Secretary of the State, March 2024

New Business Registrations by Year

Year	2019	2020	2021	2022	2023
Total	78	55	79	103	102

Total Active Businesses 769

Key Employers

Data from Municipalities, 2024

- 1 Meadow Brook Nursing Home
- 2 Monrovia/Imperial Nurseries
- 3 Arrow Concrete Products Inc
- 4 State Line
- 5 Stop and Shop

Demographics

ACS, 2018–2022

Age Distribution

	Granby	State
Under 10	1,483	11%
10 to 19	1,104	13%
20 to 29	890	13%
30 to 39	1,397	13%
40 to 49	1,111	12%
50 to 59	1,776	14%
60 to 69	1,995	13%
70 to 79	908	7%
80 and over	308	4%

Race and Ethnicity

	Granby	State
Asian	2%	5%
Black	<1%	10%
Hispanic or Latino/a	3%	17%
White	92%	64%
Other	3%	4%

Hispanic includes those of any race. Remaining racial groups include only non-hispanic. 'Other' includes American Indian, Alaska Native, Native Hawaiian, Pacific Islander, two or more races.

Language Spoken at Home

	Granby	State
English	77%	91%
Spanish	2%	12%

Educational Attainment

	Granby	State
High School Diploma Only	21%	26%
Associate Degree	8%	8%
Bachelor's Degree	23%	34%
Master's Degree or Higher	19%	22%

Housing

	Granby	State
ACS, 2018–2022		
Median Home Value	\$334,900	\$323,700
Median Rent	\$1,173	\$1,374
Housing Units	4,433	1,531,332

	Granby	State
Owner-Occupied	66%	91%
Detached or Semi-Detached	65%	91%
Vacant	4%	8%

Schools

CT Department of Education, 2023-24

School Districts

	Available Grades	Total Enrollment	Pre-K Enrollment	4-Year Grad Rate (2021-22)
Granby School District	PK-12	1,742	34	98%
Statewide	-	512,652	19,530	89%

Smarter Balanced Assessments

Met or Exceeded Expectations, 2022-23

	Math	ELA
Granby School District	53%	66%
Statewide	42%	48%

Granby, Connecticut

Labor Force

CT Department of Labor, 2023

	Granby	State
Employed	6,781	1,822,090
Unemployed	192	71,113

Unemployment Rate



Self-Employment Rate*



*ACS, 2018–2022

Catchment Areas of 15mi, 30mi, and 60mi

Massachusetts



Access

ACS, 2018–2022

Mean Commute Time * 29 min 26 min

No Access to a Car



No Internet Access



Commute Mode

Public Transport



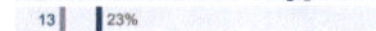
Walking or Cycling



Driving



Working From Home *



Public Transit

CTtransit Service

Express

Other Public Bus Operations

-

Train Service

-

* 5 year estimates include pre-pandemic data

Fiscal Indicators

CT Office of Policy and Management, State FY 2020-21

Municipal Revenue

Total Revenue	\$53,036,156
Property Tax Revenue	\$40,684,006
per capita	\$3,692
per capita, as % of state avg.	115%
Intergovernmental Revenue	\$11,203,157
Revenue to Expenditure Ratio	106%

Municipal Expenditure

Total Expenditure	\$49,803,203
Educational	\$36,012,829
Other	\$13,790,374

Grand List

Equalized Net Grand List	\$1,555,978,687
per capita	\$142,060
per capita, as % of state avg.	87%
Commercial/Industrial Share of Net Grand List	5%
Actual Mill Rate	39.61
Equalized Mill Rate	25.99

Municipal Debt

Moody's Rating (2023)	-
S&P Rating (2023)	AA+
Total Indebtedness	\$14,372,604
per capita	\$1,312
per capita, as % of state avg.	48%
as percent of expenditures	29%
Annual Debt Service	\$2,176,181
as % of expenditures	4%



Search AdvanceCT's **SiteFinder**, Connecticut's most comprehensive online database of available commercial properties.
advancect.org/site-selection/ct-sitefinder

About Town Profiles

The Connecticut Town Profiles are two-page reports of demographic and economic information for each of Connecticut's 169 municipalities. Reports for data are available from profiles.ctdata.org

Feedback is welcome, and should be directed to info@ctdata.org

These Profiles can be used free of charge by external organizations, as long as *AdvanceCT* and *CTData Collaborative* are cited. No representation or warranties, expressed or implied, are given regarding the accuracy of this information.

Table 10: Cost Burdened Households by Income Bracket

Household Income	Number of Occupied Housing Units	Number of households that spend 30% or more on housing	Percent of households that spend 30% or more on housing
Less than \$20,000	176	156	88.6%
\$20,000 to \$34,999	165	134	81.8%
\$35,000 to \$49,999	304	242	79.6%
\$50,000 to \$74,999	444	115	25.9%
\$75,000 or more	3,026	271	8.9%
Zero or negative income	23	-	-
No cash rent	9	-	-

Current Affordable Housing Under CGS Section 8-30g

Based on 2020 data released from the Connecticut Department of Housing, Granby has 143 affordable housing units. This means 3.28% of Granby's housing stock is considered affordable. The majority of these affordable units are located in government assisted housing developments, including the Salmon Brook Housing and Stony Hill Village developments. These housing developments are age-restricted or an applicant must have a disability to be eligible, therefore younger residents or residents with children would not qualify to live there. These developments also have an extensive waiting list. Stony Hill Village has approximately 100 people waiting for a housing unit and the wait list is about two years. Salmon Brook Housing is similar, with about a two-year waiting list as well.

Table 11: Current Affordable Housing Units

	Units
Governmentally Assisted	85
Tenant Rental Assistance	2
CHFA/USDA Mortgages	51
Deed Restricted Units	5

Summary of Findings

Below is a summary of key findings based on the information presented above:

- Data show the gross rents in Granby are affordable, however there are only 344 rental units.
- New rental units are not reflected in the data. The rental rate for these units exceeds the gross rent and as a result, these new units are not affordable for many residents.
- There may be naturally occurring affordable housing but this housing may not fit current needs given the year the structure was built and the unit size, as they tend to be smaller. This housing may also not be occupied by those needing affordable housing and there is no guarantee it will remain affordable in the future. (Please refer to page 1 for the definition of naturally occurring affordable housing.)
- Granby's naturally occurring affordable housing may not be available/come on the market frequently; only 8% of units sold in the past year were considered affordable.

Table 6: Gross Rent

Gross Rent	\$1,100
No cash paid	9
Less than \$500	34
\$500 to \$999	120
\$1,000 to \$1,499	181
\$1,500 to \$1,999	12
\$2,000 to \$2,499	47
\$2,500 or more	0

What is considered affordable housing in Granby?

Based on the household size, the table below shows what is considered an affordable monthly payment for housing.

Table 7: Affordable Monthly Housing Cost based on Household Size

Household Size	80% AMI	30% Share for Housing	Monthly Housing Cost
1	\$58,408	\$17,522	\$1,460
2	\$66,752	\$20,025	\$1,668
3	\$75,096	\$22,523	\$1,877
4	\$83,440	\$25,032	\$2,086
5	\$90,115	\$27,034	\$2,252
6	\$96,790	\$29,037	\$2,419
7	\$103,466	\$31,039	\$2,586
8	\$110,141	\$33,042	\$2,753

For rental units, if it is assumed the number of bedrooms needed for a household is one less than the size of the household, the following can be used as the maximum gross rent, which includes utilities.

Table 8: Affordable Gross Rent

	Maximum Gross Rent
Studio	\$1,460
1 bedroom	\$1,668
2 bedrooms	\$1,877
3 bedrooms	\$2,086
4+ bedrooms	\$2,252+

Based on gross rent data and the monthly housing cost, the majority of existing rental units are considered affordable. As reported by the ACS as noted above, 344 units (85%) have a gross rent of \$1,499 or less. When comparing the gross rent to the monthly housing costs, this is slightly above what would be considered affordable for a one-person household and within the affordable range for a household with two or more people. As it is unlikely all 344 units are studios, based on the maximum gross rent by bedroom count, it can be assumed that Granby rents based on bedroom count fall within what would be considered an affordable range. However, as previously noted, the majority of these units were built prior to 1999 and may not meet the needs of current residents. The newer rental units are renting for rates that exceed what would be considered affordable. As



Daniel V. Jerram
First Selectman

August 12, 2024

To Whom It May Concern:

It is my pleasure to write a letter of recommendation for Tim Bobroske.

I have known Tim and Lynn Bobroske for over 20 years. As the owners and operators of Canterbury Village Apartments in New Hartford (as well as other complexes in Thomaston, Wolcott and Terryville), they are well known within our community as compassionate and caring landlords who go the extra mile to ensure their tenants are happy. In my 15 years as First Selectman of New Hartford, I've never received a single complaint about their apartment units. The units (on Route 219) are very well maintained and have, for the past 20 years, been operated at nearly full occupancy (there always a waiting list to get in).

Because of the local success and level of professionalism, we actively recruited Tim to expand his business in New Hartford. For the past three years, we've been in search of land for them to expand.

Having found a new location, we're now in the final stages of approval of the "New Hartford Villages" a 325-unit mostly senior oriented apartment complex to be built on 160 acres on Main Street (Route 44). Tim and his team have been instrumental in working with our Planning & Zoning Commission to help create a "floating zone" that would allow for this type of development. The zone change has now been granted and preliminary approvals are in place. In just a few short weeks, we're hopeful to have final site plan approvals granted that will pave the way for construction to begin.

This new development will not only provide new housing for our senior population looking to downsize, it will extend utilities (water and sewer) in the Route 44 corridor that will bring improved opportunities for new commercial development.

The Bobroske family and their team are great team players who have worked with New Hartford's elected leaders to achieve a goal. They have been patient and deliberate in working with the town ensuring that when the project is complete, it will be successful. Should you choose to work with Tim and Lynn, I'm sure you'll find success too.

Should you have any questions or concerns, feel free to call me at any time. Thank you!

Sincerely,

Daniel V. Jerram
First Selectman
Town of New Hartford



Town Hall: 530 Main Street, P.O. Box 316; New Hartford, CT 06057 p: 860-379-3389 f: 860-379-0940

www.newhartfordct.gov

The Town of New Hartford is an Equal Opportunity Provider and Employer



Town of Thomaston

First Selectman's Office

Town Hall

158 Main Street

P.O. Box 136

Thomaston, Connecticut 06787

Phone: 860-283-4421 Fax: 860-283-137

8/12/2024

First Selectman Fiorentino
Town Manager Mike Walsh
Abby Kenyon

I write in support of Tim Bobroske Companies regarding Tim's proposed activity regarding the building of community housing in your community.

In Thomaston, Tim has constructed the Thomaston Valley Village which is an apartment complex consisting of a Community Building that also contains apartments and other stand alone buildings that have units with garage spaces. His buildings are of exceptional quality and as such have drawn people to our community who admittedly moved to live there.

As such, I can highly recommend Bobroske Companies as a responsible builder who will not only meet but will exceed your expectations.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Edmond V. Mone', written over a large, loopy flourish.

Edmond V. Mone
First Selectman



TOWN OF PLYMOUTH

Office of the Mayor

80 Main Street

Terryville, CT 06786

Phone: (860) 585-4001

Fax: (860) 585-4015

August 15, 2024


To Whom It May Concern:

I am pleased to write a Letter of Recommendation on behalf of Tim Bobroske concerning his proposed construction of a Community Housing project in your community.

Tim Bobroske constructed Quail Hollow Village, a 64-unit Senior Housing facility, in the Town of Plymouth. All the Quail Hollow units are spacious, ADA compliant and have added to the beautification of our Town. The addition of Quail Hollow Village also provided much needed housing for our Senior population.

Tim Bobroske's professionalism, while working with the Town of Plymouth's various Town offices for the Quail Hollow project, was outstanding. If I can be of any further assistance, please do not hesitate to reach out to my office.

Sincerely,


Joseph T. Kilduff
Mayor

JTK/ph



TOWN OF WOLCOTT

TOWN HALL • 10 Kenea Avenue
Wolcott, Connecticut 06716

Tel. (203) 879-8100 • Fax: (203) 879-8105

August 15, 2024

To Whom It May Concern,

I am writing to highly recommend Tim Bobroske-Stone Ridge, and their team for the outstanding work they completed in the Town of Wolcott. They were responsible for the recent construction of elderly apartments, which have significantly contributed to the well-being of our community.

The addition of these senior housing units has not only provided much-needed accommodations for our elderly residents but has also strengthened our local tax base. The apartments were built with careful consideration of the needs of our seniors, ensuring that they offer a safe, comfortable, and supportive environment for the residents.

Throughout the project, they demonstrated exceptional professionalism, efficiency, and dedication to quality.

The positive impact of this project on our community cannot be overstated. It has been a true blessing to have additional senior housing available in Wolcott, allowing our elderly residents to remain close to their families and friends while living in a supportive and secure environment.

Should you require any further information, please do not hesitate to contact me.

Sincerely,

Thomas G. Dunn
Mayor, Town of Wolcott

State of Connecticut

Department of Administrative Services

Supplier Diversity Program

This Certifies

Tim Bobroske Construction Services LLC

144 N Main Street Terryville CT 06786

Woman Owned

Small/Minority Business Enterprise

January 22, 2023 through January 22, 2025

As a

Owner(s): Lynne Bobroske; Timothy Bobroske

Contact: Lynne Bobroske

Telephone: (860) 589-3266 Ext: **FAX:** (860) 582-4759

E-Mail: timbobroske@gmail.com

Web Address: www.seniorhousingct.com

****Affiliate Companies:** Canterbury Village, LLC; Senior Housing at Quail Hollow Village, Inc; Thomaston Valley Village



Supplier Diversity Director



Supplier Diversity Specialist

** A contractor awarded a contract or a portion of a contract under the set-aside program shall not subcontract with any person(s) with whom the contractor is affiliated.





First Floor - Front Building

2BR (1492 sqft) Qty: 2
2BR (1453 sqft) Qty: 3
2BR (1095 sqft) Qty: 1
IBR (1091 sqft) Qty: 1
IBR (121-142 sqft) Qty: 10
Studio (453 sqft) Qty: 1

Second Floor - Front Building

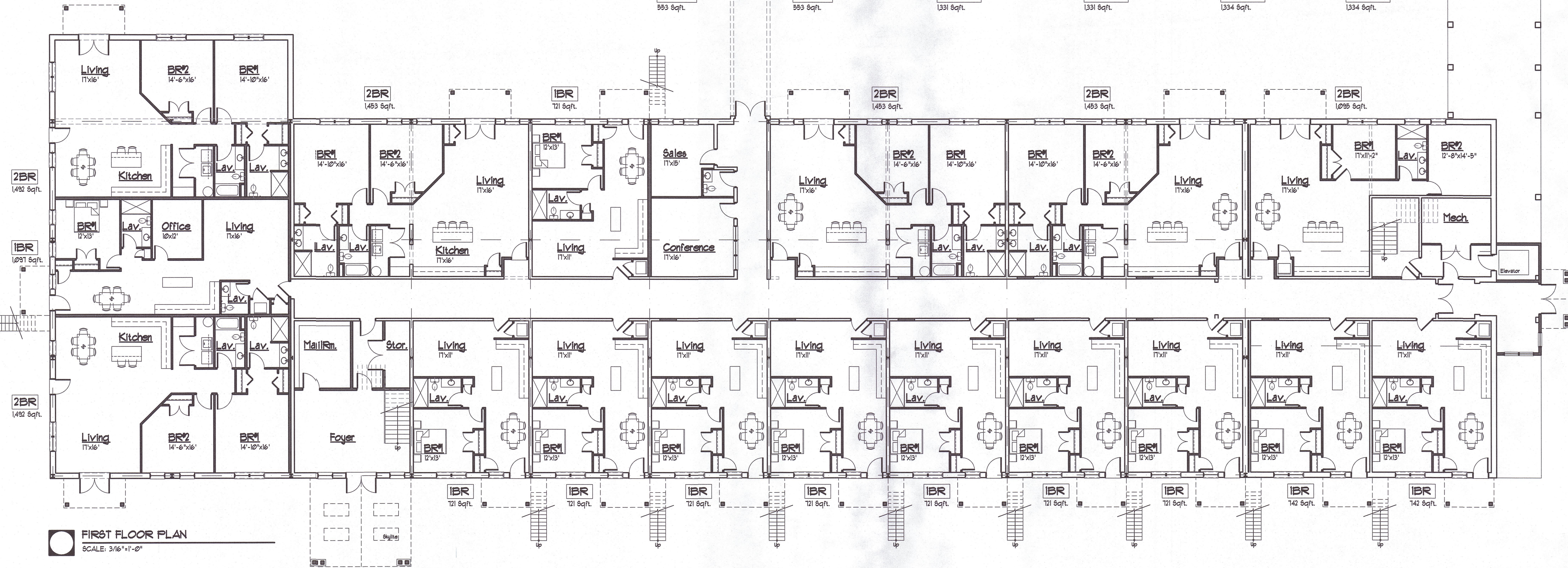
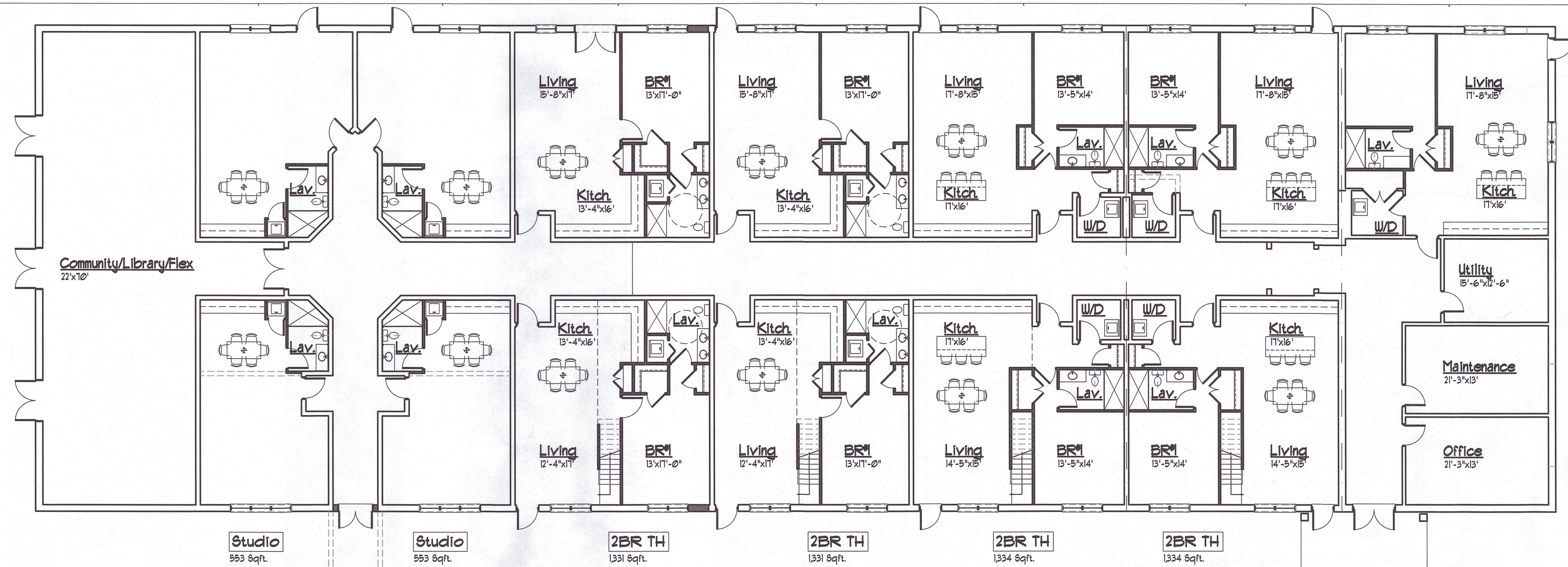
2BR (1492 sqft) Qty: 2
2BR (1095 sqft) Qty: 1
IBR (1091 sqft) Qty: 1
IBR (121-142 sqft) Qty: 10

First Floor - Back Building

2BR TH (1331-1334 sqft) Qty: 4
IBR (864-924 sqft) Qty: 5
Studio (553-639 sqft) Qty: 4

Second Floor - Back Building

IBR (864-924 sqft) Qty: 6
Studio (553-639 sqft) Qty: 4



FIRST FLOOR PLAN
SCALE: 3/16"=1'-0"

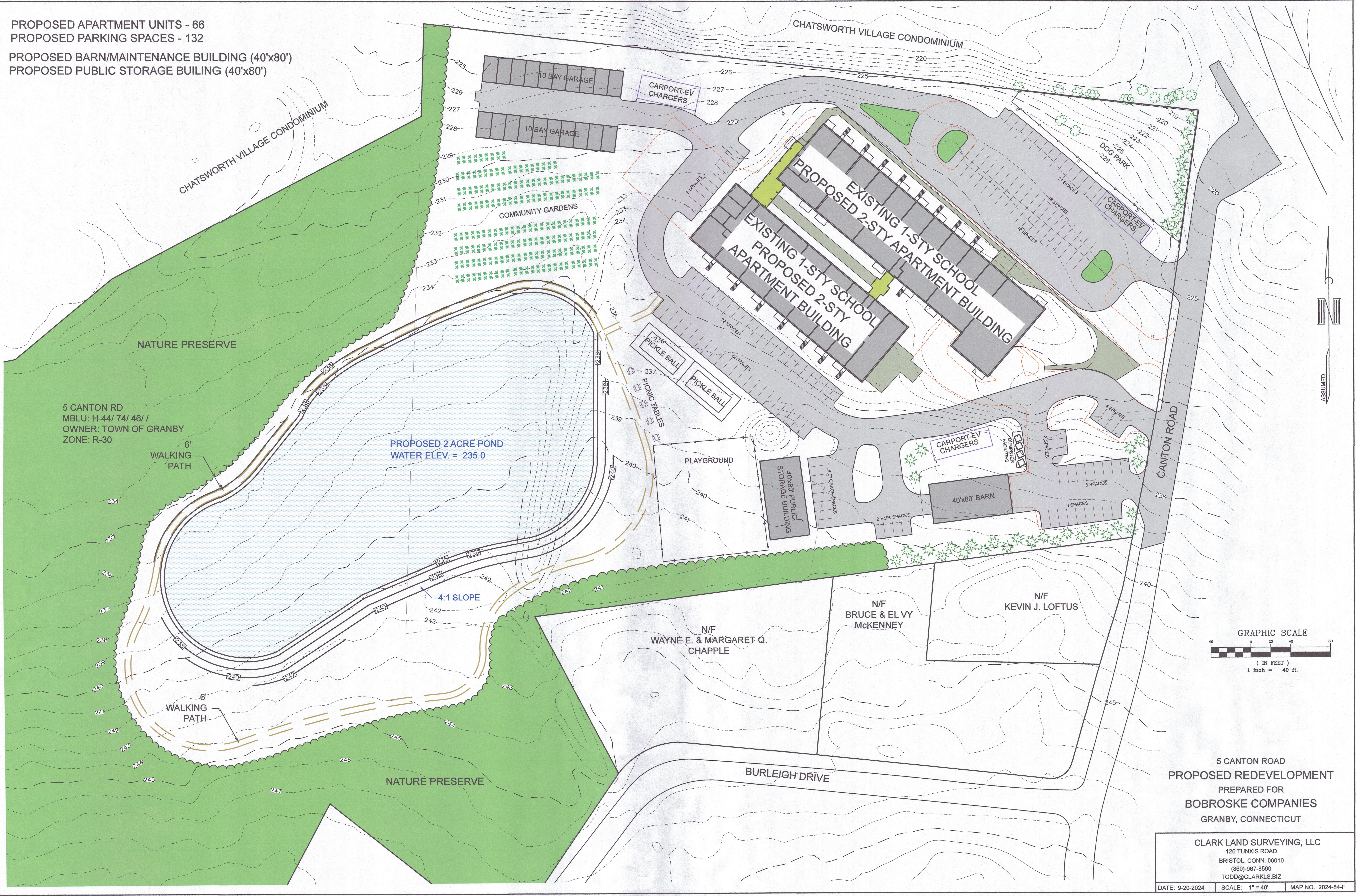


EAST SIDE ELEVATION
SCALE: 3/16"=1'-0"

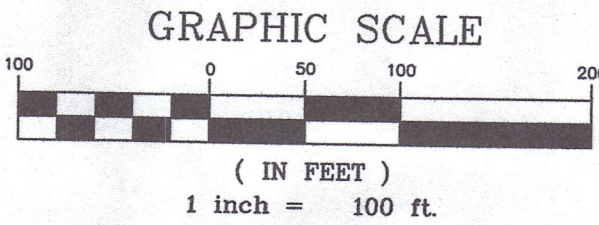
PROPOSED APARTMENT UNITS - 66
PROPOSED PARKING SPACES - 132
PROPOSED BARN/MAINTENANCE BUILDING (40'x80')
PROPOSED PUBLIC STORAGE BUILDING (40'x80')



PROPOSED APARTMENT UNITS - 66
PROPOSED PARKING SPACES - 132
PROPOSED BARN/MAINTENANCE BUILDING (40'x80')
PROPOSED PUBLIC STORAGE BUILDING (40'x80')



PROPOSED APARTMENT UNITS - 66
PROPOSED PARKING SPACES - 132
PROPOSED BARN/MAINTENANCE BUILDING (40'x80')
PROPOSED PUBLIC STORAGE BUILDING (40'x80')



5 CANTON ROAD
GENERAL LOCATION MAP
PREPARED FOR
BOBROSKE COMPANIES
GRANBY, CONNECTICUT

CLARK LAND SURVEYING, LLC
126 TUNXIS ROAD
BRISTOL, CONN. 06010
(860)-967-8590
TODD@CLARKLS.BIZ
DATE: 9-20-2024 SCALE: 1" = 100' MAP NO. 2024-84-S

Tim Bobroske and Mike Chadwick

Kearns RFP Formal Interview Format

Introduction

Background of firm and personnel to be involved in project, including other housing developments that have been completed

Proposal for 5 Canton Road, Kearns School

Overall site layout and building(s) – Rendering of building and conceptual site plan are helpful

Building footprint/parking layout

Other site amenities (gardens, walking trail, pond, courtyard, etc.)

Building Description

Renovate vs. demolish and build new

Number of proposed stories.

Number of units

Details about accessibility / design of the units and the building(s), including information about sustainability and energy source to power them

Information about any community spaces in the building

Occupants / Unit restrictions

Senior (specify the age) or mixed ages proposed

Proposed unit affordability: provide information about the proposed number of units at each AMI level. Specifically, please provide a chart showing the rent, bedroom count, and square footage for the apartments proposed.

It appears the proposed affordability level is 80% AMI. Please provide information if any units below 80% AMI, such as 60% or 50% AMI, could be included.

Operations

Describe how property maintenance would be handled

Describe if any support services or other services would be provided on site

Other

Provide information if the project will be phased

Provide information if any consideration has been given to the west side of the property and development potential

Financial / Pro Forma

Provide overview of total proposed budget for the project, including funding sources

Provide details if firm has experience obtaining funding and if so, from what sources.

In budget, include if there is a proposed purchase price for the property.

Provide information about any financial assistance requested from the Town, including the following:

Building permit fee reduction or waiver

Sewer connection permit reduction or waiver

Tax abatement

Other

Town Assistance

Describe what would be expected from the Town, if anything, during the following phases:

Pre-development / permitting phase

Development / construction

Post development / operational

Questions / Other Information

Does the proposer have any specific questions for the Town?

Does the Town have any questions for the proposer?