

27 Upton  
Redevelopment of Former Grafton DPW  
Response to Request for Proposals  
January 15, 2021



---

Submitted To:  
Town of Grafton Municipal Offices  
30 Providence Rd.  
Grafton, MA 01519  
"27 Upton Street Development Proposal"

Submitted By:  
GSX Ventures, LLC

---



January 15, 2021

Town of Grafton Municipal Offices  
30 Providence Road  
Grafton, MA 01119  
Attn: Carter Terenzini, Town Administrator

Re: Redevelopment of Former DPW Garage & Wood Barn as Mixed Use (17 and 27 Upton St)

Dear Mr. Terenzini,

On behalf of GSX Ventures ("GSX"), we are pleased to submit the enclosed response to the Town of Grafton's ("Town" or "Grafton") Request for Proposals for the Redevelopment of the Former DPW Garage & Wood Barn as a Mixed-Use Development.

GSX Ventures and its affiliated company, Grant Architects, PC has been actively involved in real estate development for over 40 years throughout the Eastern Region of the United States from Colorado to Massachusetts and many locations in between. Our projects include Assisted and Independent living communities, Transit Oriented Mixed-Use Residential Communities, Medical Office Buildings and Privatized Student Housing Communities.

As our response and prior experience will demonstrate, our team is highly qualified in the creation of transformative mixed-use redevelopment projects. We believe that at full build-out our program will unlock the potential of the site as a mixed use luxury senior housing complex that includes support retail and covered parking along with a separate brew pub barn restaurant that will have outdoor space for dining and country market events.

The project we envision will also help close Grafton's affordable housing gap, by delivering 14 affordable units. Our development plan may include the preservation of the existing barn structure and our overall re-development will incorporate the New England and town square architectural vocabulary of Grafton's historic downtown. This is an exciting project for the Town of Grafton which will increase the number of village residents by 200 or more seniors including 198 parking spaces of which 160 are covered and add a new shopping area with connective sidewalks that will expand the walkable village and allow for future growth beyond our property. We look forward to the opportunity to bring this project from concept to reality and to its positive impact of the fabric of your historic and attractive town.



This higher density project will add significantly to the tax base of Grafton, while requiring few services and making minimal impact on traffic.  
We look forward to discussing this proposal with you in greater detail.

Sincerely,

Jon M Grant, President – GSX Ventures

# **Table of Contents**

## **A. Technical Proposal**

### **1. Development Team**

- a) Overview GSX Ventures, LLC
- b) Organizational Chart
- c) Contact Information and Description of Team
- d) Core Team Biographies and Representative Experience
  - i. GSX Ventures, LLC
  - ii. Grant Architects
  - iii. Western Builders
- e) Support Team Biographies
  - i. Team Solar
  - ii. Sage Engineering Associates, LLP
  - iii. Keystone Structural Solutions
  - iv. Tighe & Bond
  - v. CID Design Group
- f) Description of Other Real Estate Owned

### **2. Project Narrative**

- a) Description of the Project
- b) Engagement of municipal boards, committees, and the community in shaping the project
- c) Zoning Analysis
- d) Historic Preservation

### **3. Conceptual Plans**

1. Building Renovation Plans
2. Preservation of Historic Structures and Features
3. Demolition Plans
4. New Building Plans
  - a) Project Renderings
  - b) Floor Plans
  - c) Site Plan
  - d) Wetlands Plan
5. Description of Utility Connections

### **4. Project Financials**

1. Evidence of financial Status of the Applicant
2. Estimated Project Proforma
3. References

### **5. Completed attachments H-L**

1. Form H Tax Attestation Certification
2. Form I Hold Harmless & Indemnity Agreement
3. Form J Certification of Corporate Authority
4. Form K Certificate of Foreign Corporation
5. Form L Disclosure Statement for Transaction with a Public Agency Concerning Real Property

## **B. Cost Proposal (provided separately)**





## A. Technical Proposal

### 1. Development Team

- a) Overview of Western Builders and GSX Ventures Past Partnerships

#### 27 Upton

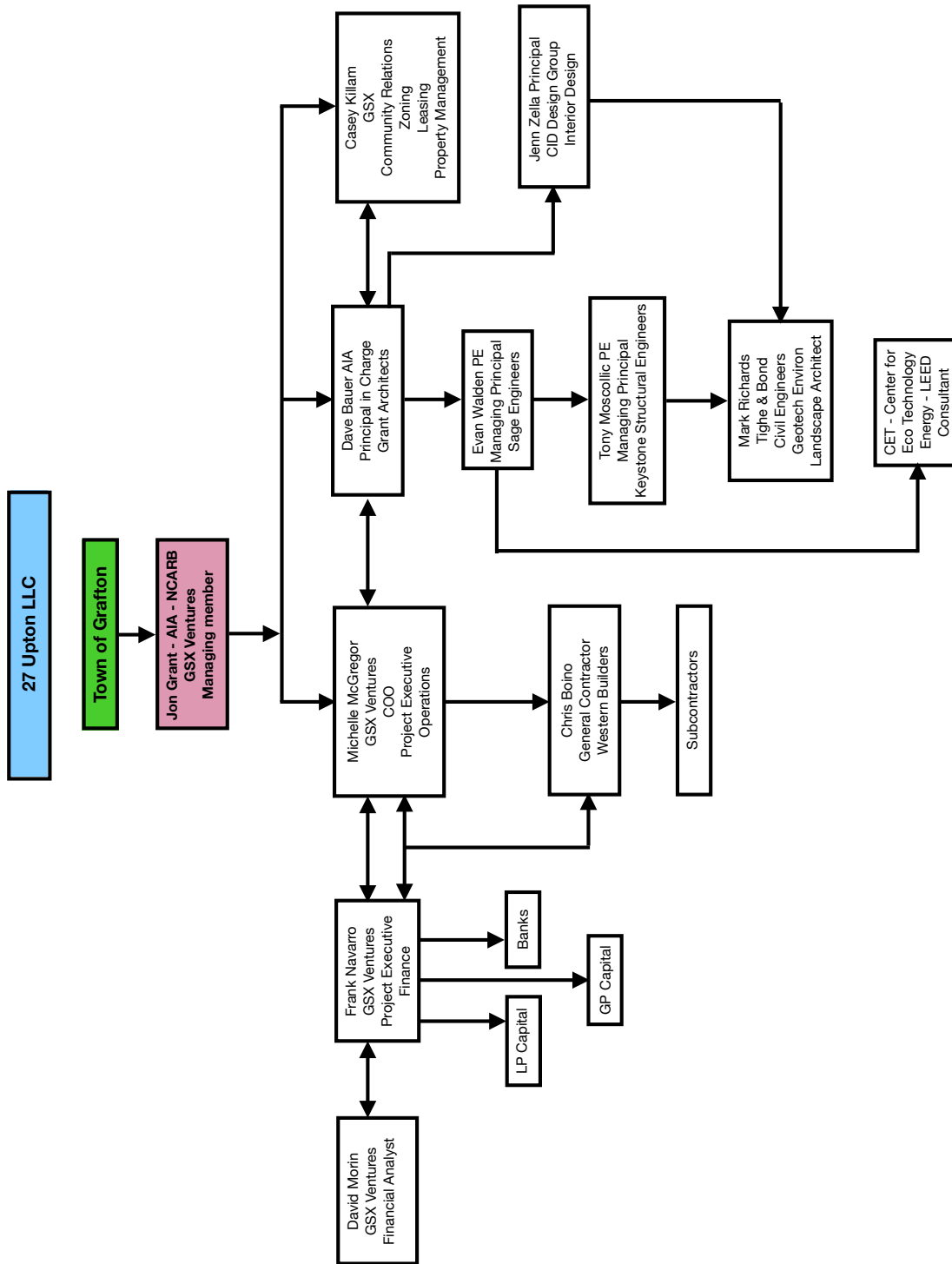
GSX Ventures and Western Builders have been working together in Massachusetts since 2017 on a series of projects, including:

**Sage at Hudson**, a \$65,000,000 Assisted and Independent Living Community in Hudson, MA

**Aspen at Amherst**, a \$27,000,000 Market Rate Apartment Project in Amherst, MA.

Through these successful ventures we have developed a Joint Venture Platform to Develop projects throughout the New England Region. Our Joint Venture leverages the skill sets of each company to create developments that are Community Centric and Sustainable, Economically Sound, and Architecturally Memorable utilizing the Design and Sustainability talents of GSX in conjunction with the Construction knowledge and Financial Strength of Western Builders.

In this proposal we bring this team's same skill set to design and develop 27 Upton, a mixed-use community which we are proposing to you through this RFP response. We believe the sound economics of this proposal and its ability to address the many needs of this community make it a great fit for this site and the local community. We look forward to presenting our plan to you in person and reviewing all the ways that it can re-energize this site and benefit the community.



**c) Contact Information and Description of the Team**

Development Team: GSX Ventures, LLC  
1501 Reedsdale St., Suite 301  
Pittsburgh, PA 15233

Authorized Representatives: **Jon Grant**, AIA, NCARB  
Office: 301-785-4028

Primary Responsibilities: Co-Managing Members

**1. Grant Architects**

David Bauer: Principal-in-Charge  
Primary Responsibility: Architectural and Engineering Services

**2. Western Builders**

Christopher Boino: President  
Primary Responsibility: Construction Manager

**4. Tighe & Bond**

Marc Richards: Senior Vice President  
Jean Christy: Senior Engineer, Tighe & Bond  
Primary Responsibilities: Civil, Geotechnical and Env. Engineering, Landscape  
Architecture

**5. Sage Engineering Associates, LLP**

Evan Walden: Principal  
Primary Responsibility: MEP Design

**6. Keystone Structural Solutions**

Tony Moscollic  
Primary Responsibility: Structural Engineering



Technical Proposal | A1d  
Core Team Member  
Biographies  
And Representative  
Experience







GSX Solutions is a real estate development and consulting firm that specializes in the discovery and strategic repositioning of properties to support targeted real estate developments, such as Student Apartment Complexes, Assisted Living Facilities, and Intentional Communities. We use our in-house site selection, architectural design, site planning and rezoning expertise to monetize or increase the value of real estate assets throughout the country. We currently focus on the redevelopment of strategically located urban sites that improve the quality of life in neighborhoods and increase tax base while providing excellent investments for our capital partners.

GSX's areas of expertise include:

Development, entitlement and acquisition of raw land

Merchant development work for non-profits or end users

Real estate development, including vertical development

Market evaluation, site selection and acquisition and rezoning for institutional groups

Development of specific project types including

- Student/conventional apartment complexes
- Assisted Living Facilities
- Specialized Residential Communities

GSX has a thirty-three year history of creating increased value in land and construction through targeted re-zoning and high-density, high-quality design and community service.



**Jon Grant Profile**

Jon Grant is the Founder and President of GSX Ventures a Vertically Integrated Real Estate Development, Design, and Planning firm.

GSX Ventures focuses its resources primarily in four markets,

- Assisted and Independent Living Communities
- Privately Owned Market Rate Student Housing
- Transit Oriented Mixed-Use Developments
- Medical Office Buildings.

The founding Principal of Grant Architects, Jon Grant is the president and design director at this award-winning national design and planning firm with a 32-year history of sustainable design leadership. Grant Architects is licensed in 15 states and NCARB certified to practice Nationwide.

GSX Ventures uses the firm’s unique Design, Planning, Zoning and Community Consensus Building talents coupled with a deep knowledge of the economics that drive real estate development to find and create high quality, successful, sustainable, community centric projects, in appropriate locations nationwide.

Mr. Grant is committed to producing Developments that are sustainably planned and designed, economically smart, and community sensitive, employing a win -win philosophy that has been the company’s hallmark for the past 30 years.

Mr. Grant has led the Design and Planning effort for the Village at Grafton Wood and will serve a principal in charge of Design as well as Co- Managing the Development Team. He will lead community partnering meetings with local stakeholders through the zoning and entitlement process.

**Education**

<b>Robert Morris University</b> , Pittsburgh, Pa.	1981 Real Estate Development
<b>Carnegie Mellon University</b> , Pittsburgh, Pa.	1976 Bachelor of Architecture
<b>Phillips Academy</b> , Andover, Ma.	1971 Academic Diploma

**Career History**

<b>Grant Architects</b> - Founder and Design Director	1988-Present
<b>WTW Architects</b> - Director and Partner	1985-1988
<b>Burt Hill</b> - Director of Design and Associate,	1980-1985
<b>Office of Tasso Katselas</b> - Director of Design	1977-1980





## **Michelle McGregor – Profile**

**Michelle McGregor** is the Chief Operations Officer and Managing Principal of GSX Ventures. This Niche Development and Architectural Firm serves key development market segments that include Millennial, Senior and Student Housing; as well as Medical Office Buildings in the United States. An experienced Global Enterprise Risk Leader with a broad base that includes Real Estate Development, HSSE Strategic Risk, Global Corporate Real Estate and Facilities Engineering Management, Sustainability, Analytics, Project, Program and Performance Management through Lean and Six Sigma in key business sectors that include Energy, Chemical, Petrochemical, Heavy Manufacturing, Government, Consulting, NGOs and Real Estate Development.

McGregor managed the Global Corporate Real Estate Group for a Multinational Company that included a portfolio of over 240 locations in over 60 countries world-wide. McGregor successfully patented and launched new analytics technologies for a number of Industry sectors. Extensive mergers and acquisitions experience, with successful integrations of over 5 global companies. Lead teams in implementing a Standardized approach to Enterprise Operations Risk, Sustainability and HSSE Leadership.

### **Education and Certifications**

**Cornell University** – Project Management Professional

**Rice University** – Leadership for the Energy Industry

**Kennametal University** – Leadership/Business

**University of Pittsburgh School of Law** – Environmental Law

**Texas A&M University** – B.S. – Biology / Chemistry

### **Career History**

**GSX Ventures** - COO and Managing Principal – 2018 to Present

**Nature Conservancy** – Senior Energy Advisor – 2015-2018

**Wipro Technologies** – Americas Risk Practice Leader – 2012-2015

**Elliott Turbo (Ebara Group)** – Global Director HSSEQ – 2008-2012

**URS Corporation** – Practice Leader – Canada – 2007

**Givaudan Flavors (Chemical)** – Director – 2005-2006

**Kennametal** – Global Executive 2000-2005

**Marathon Oil** – SHE and Strike Team

**US Steel** – Environmental Engineering Group



Casey Killam is responsible for sourcing new site acquisitions that strategically align with GSX Ventures' long term vision and existing portfolio. He has been assisting GSX Ventures since 2015 in identifying key sites and working through the entitlement process within the New England market for student housing, assisted living and multifamily dwellings.

Outside of GSX development, Mr. Killam is a partner in a central Massachusetts real estate development and management company that focuses on mill renovations. Their recent projects include a 44,000 square foot mill in Westborough and the 200,000 square foot former Clark-Cutler-McDermott manufacturing campus in downtown Franklin.

His knowledge of the New England market and ability to find key sites in high demand areas has been a valuable addition to the team. He is a graduate of the University of Massachusetts, Amherst.



**David Morin**

David most recently worked as a development manager with Parallel-Co where he was responsible for managing the development and construction of a \$70 million high-rise in Austin, TX. He is also the co-founder of Site Identify; a software company that helps developers select and analyze potential development sites. Prior to starting Site Identify, he worked as a development associate for Aspen Height Partners where he was involved in the development of over \$200 million of multifamily and student housing projects. David graduated from Texas A&M Cum Laude with a B.S in Urban and Regional Sciences.



**Frank Navarro**

Frank most recently worked as a financial analyst and project manager for Aspen Heights Partners and was previously involved in a variety of multifamily development projects at the Greylock Property Group. His experience includes development, asset management, capital markets, and acquisitions. Frank graduated with an M.S. in Finance from Boston College and a B.S. in Economics from Wake Forest University. Frank is also an Airborne Ranger in the Texas Army National Guard where he serves as an Executive Officer.





**Galleria at Loudonville - Courtyard**

## **Loudonville, New York**

### **Galleria at Loudonville – Albany, NY**

The revitalization of 8-acres that formerly housed Hoffman’s Playland at the heart of Loudonville, NY an upscale suburb of Albany has set the stage for a dramatic mixed-use community; the Galleria at Loudonville. The project was a strategic response to the Community’s desire to reuse the site without overburdening the already stretched highway. GSX Ventures working with our development partner the Burke Companies and Sage Montgomery Street Partners created a mix of uses that intensively used the site and at the same time dramatically reduced traffic from the original numbers generated by the former amusement park. The resulting mixed-use project addresses the community by providing 26,000 GSF of luxury retail that include two major white linen restaurants. The other component of the site is an assisted and independent living facility for seniors that encompasses 250,000 GSF including integral parking.

Between these two structures we have placed an outdoor park that allows for joint project community activities and outdoor dining for the restaurants. The reuse of this important land in a way that economically benefitted the owners and developers and also met the needs of the community is an example of GSX Ventures approach to win-win solutions. The total project cost is \$92M. Construction will commence in spring of 2021 and occupancy will commence in Spring of 2022.



## **Hudson, MA**

### **Sage at Hudson**

At the intersection of Washington Avenue and the access road to 495 in Hudson a collection of three dilapidated houses comprised a family estate of 8 acres that was strategically located in the suburban retail corridor of Hudson MA. The city and developers had proposed hotels, large multi-family and retail complexes on the site, all of which met with significant community opposition due to the traffic generated by these various uses on the already overtaxed Washington Avenue. GSX took the property under agreement and proposed an attractive luxury seniors complex with AL and II which is casual low-rise complex that the town and its citizens could get behind. The challenges this project encompassed for zoning included a new whole new zoning classification needed for senior housing which included many meetings with town representatives and a town hall meeting. GSX Worked with the town to create both a new sewer and water line for the City to make the project viable and invested substantial funds in improving infrastructure under the river that allowed for further development in the Hudson area. GSX and its partnership with the City in this redevelopment site created a substantial improvement and investment in the area and provided much needed senior housing for the local residents. The project, which is currently under construction, will be ready for occupancy in July of 2020. The project contains 150,000 GSF and include integral parking.





## **Amherst, Massachusetts**

### **Aspen at Amherst**

The Town of Amherst has a significant housing shortage for both professionals and students. Within a half a mile from the center of town and the University of Massachusetts was a dilapidated motel situated on 8 acres that opened to the main retail corridor of Northumberland Avenue and well buffered from the surrounding residential communities by trees. The project had a number of hurdles including the expansion of a non-conforming use to allow the apartment to replace the hotel; as well as the fact that the site was divided in between two townships Amherst and Hadley requiring zoning re-use modifications.

Working with the town and community, GSX forged an agreement to zone a housing unit on the Amherst side and to build the parking on the Hadley side, thus allowing this site to be re-used and also provide 25 units of affordable housing for the City of Amherst. In additional conversations with neighbors, the project was reduced in scale and additional buffering was provided. The project utilizes the Massachusetts stretch energy code. The project currently under construction will open in January of 2021.



## **Lakewood, Colorado**

### **Wadsworth Place**

This 6- acre site adjacent to the Lakewood, CO metro station is three (3) miles from downtown Denver Colorado. The original development site contained a former moto-sports vehicles sales office, a beauty academy and an abandoned house. GSX worked with partner Aspen Heights to create 380-unit mixed use retail and multi-family housing community which is 350,000 GSF including a parking garage. The development of this project next to the commuter rail in a blighted area of the city of Lakewood has given the city a springboard for new development projects that will replace the entire neighborhood that surrounds the metro. Using state-of-the-art market analysis we established tenant profiles for both the tenant and residential space which includes integral parking and outdoor dining areas that face the main Wadsworth Avenue. Young professionals targeted by the project are attracted by a wealth of amenities including a roof-top pool that provides views of both downtown Denver and the mountains of Golden Colorado. The project also includes live-work units for professionals who would like to have a workspace at home.

Project commences in Fall of 2020 and opens for occupancy in the Spring of 2022. As we break ground for this project, property values surrounding this project have dramatically increased and employers are excited to have affordable housing for their workforce.





## **Overview**

Grant Architects is an award-winning design firm specializing in iconic architecture and complex project design. Grant Architects' mission is not to become one of the world's largest architecture firms; rather, it is to be a client-focused firm through solving our clients' original and complex problems and creating remarkable design solutions.

## **Philosophy**

Grant Architects' philosophy is built on the dual concepts of client service and design innovation. We help our clients achieve signature buildings that provide a design investment for the client's future. We pair this with continuous communication and partnering with both our clients and contractors in a mutually respectful forum in order to promote the completion of projects with fewer claims and delays. Keeping our client's goals in the forefront allows us to produce the best solutions to their organization's mission and goals.

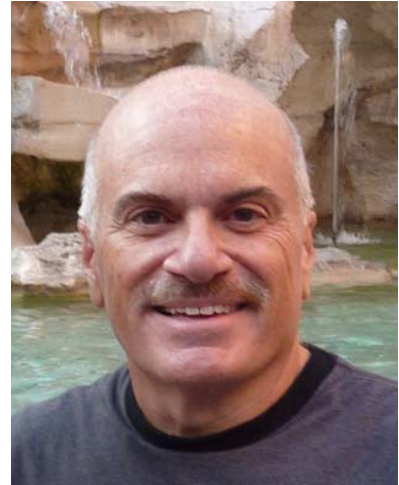
## **Sustainable Design**

We are committed to the protection of our environment and the planet's resources. We understand the relationship between social, economic, and ecological sustainability. Through Green and Sustainable design, our buildings promote sustainable, ecologically responsible, and cost-effective buildings to live, learn, work, and play.

Jon M. Grant, AIA, NCARB

President

**DAVID L. BAUER, AIA**  
**MANAGING PARTNER**



**Education**

*Bachelor of Architecture, Carnegie Mellon University*

**Registrations**

Registered Architect: Maryland, Missouri, Ohio, Pennsylvania,  
Texas, West Virginia and Virginia  
NCARB Certification

**Affiliations**

Member, American Institute of Architects

**Experience**

Dave is the managing partner and is in charge of project management and business management for the firm. He also acts as principal-in-charge on most projects within the firm. He is responsible for the coordination of the project team, including internal team members, consultants, and the owner. Dave oversees the work product flow from concept design through completion of construction and ultimately occupancy.

**Selected Project Experience**

Aspen-Albany Student Housing, Albany, NY  
Auden Student Housing, Albany, NY  
Sage at Hudson Assisted & Independent Living, Hudson, MA  
Butler County Community College Student Housing, Butler, PA  
Amherst Apartments, Amherst, MA  
Bay Village Assisted Living, Annapolis, MD  
Jeremiah Village Apartments, Zelienople, PA  
First LEED Certified gut-rehab residence in Pittsburgh/Western Pennsylvania  
Daniel S. Reemsnyder Research Center, West Virginia Wesleyan College  
Fleming Hall Dormitory, West Virginia Wesleyan College  
Duquesne Light Training and Conference Center  
Erie, PA - Federal Courthouse and Post Office Complex- GSA Vista Print,  
Montego Bay, Jamaica - Call Center and Training Campus  
The Elliott Company, Jeanette, PA - New Headquarters Building  
Express Scripts - Pueblo, CO and St. Marys, GA  
Marriott Hotels, worldwide - Call Centers  
Barnett Office Park - Montego Bay, Jamaica  
American Waterworks- Pensacola, FL and Alton, IL  
Telespectrum Worldwide, Inc., Buffalo, NY and Duluth, MN - Call Center  
SITEL Technology Services, Augusta, GA and Longview, CA - Reservations Call Center  
Slippery Rock University, Slippery Rock, PA - Art Building



GRANT ARCHITECTS

## Bay Village Assisted Living, Annapolis, MD



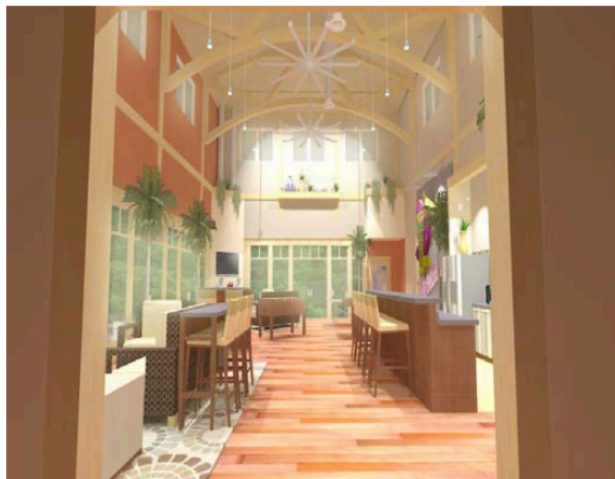
*The Residences at Bay Village is an 88 unit assisted living facility that will be located in Annapolis, Maryland. This LEED Gold building is designed to allow senior citizens to have a comfortable, state-of-the-art dwelling with all of the necessary medical equipment and facilities out of plain view. There will be multitude of dining options, a rooftop terrace, and a beautifully landscaped exterior in addition to the latest in security technology.*





GRANT ARCHITECTS

## The Cove, Coastal Carolina University



*The Cove is a 450 bed student housing project on 7 acres across the street from the Coastal Carolina campus. The project is a 3 story walk-up wood frame design centering around a courtyard and a large clubhouse that includes a fitness center, social amenities, outdoor porches, leasing offices, and study rooms. The project's design created a secure environment for students to congregate. All of the units are equal in bed to bath ratio, 2/2, 3/3 and 4/4. The final design created an oasis in the center of the site with parking around the perimeter, minimizing walking distance and offering a cool and refreshing respite at the end of the day.*





### **Auden at Albany, NY - 1385 Washington Avenue**

After a very successful student housing project at 1475 Washington Avenue in Albany New York, GSX Ventures turned to another redevelopment site that housed a former Red-Carpet Inn at 1385 Washington Avenue. The site was tucked between two existing hotel properties in a land area that created a high-density state-of-the-art student housing project that was 100% leased 5 days after it opened. DMG and DGW Development joined our team after we secured planning approvals to provide the capital and debt. We are currently working on a 3<sup>rd</sup> project with the same group. Auden at Albany opened on time and on budget with less than 1% change orders. The project consists of a four story, wood frame building over a concrete transfer slab and one story of parking. The parking lot below the building contains 158 spaces. There is some perimeter parking around the building as well. The building itself contains 322 beds of student housing plus a number of amenities including a fitness center, game room, clubhouse, computer laboratory, leasing offices, mail rooms and tanning booths. The project is serviced by a bank of two elevators and consists of 1 bed 1 bath, 2 bed 2 bath, 3 bed 3 bath and 4 bed 4 bath apartments. The project is within 2,000 feet of the main tower of SUNY Albany and is connected there via sidewalks and a crosswalk. Most students will travel to campus by bike or by foot. The project was constructed by Jersen Construction, and the total budget for the project was 30 Million hard and soft.



### **Institute for Software Research – Fairmont, WV**

In 2002 Grant Architects was awarded the contract for the United States Institute for Software Research. This research center supported NASA's long range space station plans as well as a number of other Defense Department initiatives. This architectural commission was won in a design competition that included some of the country's largest and most prestigious architectural firms. The building's unique aerodynamic design resembles a metal wing integrated into a mountain landscape. At the center of the composition is an EarthLink tower that allows researchers to change trajectories on satellites to obtain global surveillance.

The project is unique in that it combines a number of different spaces that allow researchers and technicians to work together on a number of concepts, including liquid plasma sonic wave designs. The top 4 floors of the project contained a research space that provided 5 strands of fiber optics at every desktop making it one of the highest speed internet connections in the world. The ground floor has high efficiency conference rooms, a cafeteria and a buoyancy lab and the lower two floors were high bay research areas that supported Design Research that was conceived in the upper floors. The building also has a flight simulator and international conference facility. Grant Architects working with ISR programmed, designed and monitored the construction of this \$134M project which won numerous design awards including the Grand Design award of the AIA Baltimore chapter and the State of West Virginia Design honor award. The project currently is occupied by a number of research organizations including the Department of Defense and the Federal Bureau of Investigations counter terrorist center.



Christopher J. Boino, President (Western Builders)  
Mr. Boino assumed the presidency of Western Builders in early 2014 after joining the firm in 2013, and holds authority and responsibility for all operations and activities of the company. As a nineteen year construction veteran, Mr. Boino brought a highly regarded resume of experience as construction manager in the Boston area and throughout southern New England.  
Mr. Boino received his B.S. in Construction Management from Arizona State University's College of Engineering and Master of Business Administration from Bentley University.



### **History**

Western Builders is proud of our reputation as a merit shop “builder’s builder” earned over the course of forty years of successful operation. We specialize in pre-construction, general contracting and CM services for academic, senior housing and healthcare clients. Since 1975 we have gained in-house expertise successfully completing large residential projects similar in scope and complexity to the Grafton State Hospital Redevelopment Project for clients such as Glenmeadow at Home, The Lathrop Communities, Optimus Senior Living, The Arbors, Keystone Senior Living and many others.

Western Builders is a business holding of a larger parent company which affords us access to experts in engineering, environmental regulations, remediation and similar fields. Such in-house resources are typically unavailable to similar sized builders; this advantage provides Western with a wealth of knowledge and efficiencies which are in turn passed along to benefit our clients.

From its inception, Western Builders has enjoyed distinction with its ability to take on and effectively complete complex wood framed structures. Wood framing has become a specialization if not our calling card.

### **Staff**

Our permanent staff of eighteen includes nine skilled superintendents, each of whom has risen through the trades with over twenty years experience in supervision, and four project managers. Our project managers and senior staff will generate and maintain accurate budgets, execute CPM schedules and ensure that site logistics and safety are properly maintained onsite.

Our PMs and Superintendents bring decades of experience to a project, equipping them with both the technical and interpersonal skills to choreograph the building process. Furthermore, their expertise provides the foresight to anticipate red flags and warning signs, all of which results in responsible management, quality control and administration.

### **Approach**

Western takes the same operational approach to all our projects whether fixed price bid or negotiated Construction Management. We establish and maintain a collaborative attitude among all team members because our ultimate goal is a satisfied client. To achieve that goal, we follow a proven process of hands-on management for all aspects of the work.





### **Smith College Paradise Road Housing Project**

Peter Gagnon  
Owner's Rep, Smith College  
413-585-2406  
pgagnon@smith.edu

Tom Hartman  
Coldham Hartman Architects  
413-549-3616  
thartman@coldhamhartman.com

Completed January 2016, Paradise Road Student Housing project added 80 beds to the campus center of Smith College. Some key challenges of the project were its proximity to river frontage and abutting wetlands, requiring a 200' river buffer and 100' wetland buffer respectively and coordination with local architectural representation for a Principal and Firm based in Seattle. The project is five separate new wood-framed residential units with brick exteriors and standing seam metal roof panels. Paradise Road Housing attained LEED Platinum certification.



### **Elms College Center for Natural and Health Sciences**

Sister Mary Reap, IHM, Ph.D.  
President, Elms College  
413-265-2293 (Assistant Sandra Talbot)  
talbots@elms.edu

Kevin Chrobak Juster  
Pope Frazier Architects  
413-594-2761  
kchrobak@justerpopefrazier.com

The Center for Natural and Health Science is a steel framed, new brick building, built largely to further distinguish the Elms College Nursing Program. It contains 11 labs, including science technology and nursing simulation. Close coordination was required to integrate all MEPs necessary for the labs. The building is in the campus center and connects to one of the College's original structures. The original building was fully occupied throughout construction which necessitated pedestrian traffic redirection, dust and noise control.



### **Stonebrook Village Apartments**

Fred Mielke  
Old County Senior Living, LLC  
413-787-1711  
fmielke@optimusseniorliving.com

Viren Gori  
Gori & Associates  
612-232-9539  
viren@gori-associates.com

Western Builders recently completed construction of this wood framed complex, which stands 4 stories high and encompasses 106,000 SF of finished space. Stonebrook is comprised of 112 residential units, including Independent, assisted and memory care, as well as a full-service commercial kitchen, numerous dining areas, a fitness center, beauty salon, billiards, theater, and staff offices. The significant site improvements package consisted of extensive paving, underground utilities, site lighting, and landscaping.



### **Chestnut Park Apartments**

Dave Moore  
Project Manager, Weld Mgt.  
413-433-0868  
davemooreholyoke@comcast.net

Gary Kane  
The Architectural Team  
917-889-4402  
gkane@architecturalteam.com

As Construction Manager, Western Builders recently completed renovations to the 5 building campus of the former Holyoke Catholic High School. At completion, the Town of Holyoke added 55 new affordable housing units to the town center. Coordination and compliance with the Massachusetts Historical Commission, funding from Federal Low Income Housing Tax Credits, and conservation of original architectural details and finishes were crucial to project success.



Technical Proposal | A1e  
Support Team Member  
Biographies  
And Representative  
Experience





## **Support Team Bios and Key Projects – Team Solar**



Team Solar is made up of industry experts, solar enthusiasts, and even past customers. Every person is picked based on their passion to help bring solar to others in an educational format. This means that as a company we do not use aggressive means of advertising and we do not have a quota.

Our goal is to have a consultation with every customer and educate them on solar solutions. We are ok to do that on our customers terms when they have free time. We believe that the available opportunities in the industry are strong enough and thus our goal is to spread the available information to the the entire country!

From the beginning, the organization has been focused on helping non-profits in going solar. Non-Profit entities are by in large neglected by the solar industry (due to the fact that they do not have a high tax liability in most cases, meaning that the solar ITC cannot be utilized which usually renders the projects unviable).

Team Solar's mission is centered around spreading the environmental and economic advantages of renewable energy to a broader market.

We believe at our core that the energy industry is ready for an overhaul, and we are at the forefront of doing just that! We have worked hard to create a financial package for solar that requires absolutely no money down for any property owner (with no loans!).

Traditionally, property owners would have to pay out-of-pocket or finance a solar project, and these were their only options to do so! The advent of truly free solar PPA's and leases is a game-changer for the industry. This allows property owners to gain all of the benefits of going solar, but reduces the financial burden in doing so.

Many states have also begun implementing solar incentives and embracing the ensuing wave of renewables. This combined with plummeting solar costs allows for property owners to reap the benefits like never before if they choose to won their projects as well!



## Support Team Bios and Key Projects – Team Solar



### James Neal

CEO And Co-Founder

James Neal is the CEO of Team Solar and has 10 years of experience in the solar / energy industry. A graduate of University of Massachusetts Dartmouth, James obtained his MBA from South University in Savannah Georgia. During graduate school, he worked for a not-for-profit that specialized in helping local companies save money by lowering their energy usage.

After graduation, James went into a sales role in the Solar industry, becoming the number one sales person in the country for the organization. He contributes his success to his passion to create an environmentally sustainable future.

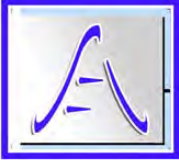


### Jon Neal

Co-Founder

Jon is the co-founder of Team Solar and has 4 years of solar experience. Jon went to college at the University Of Massachusetts where he studied operations management and marketing.

After graduation, Jon went to work for an energy efficiency related startup in Massachusetts, where he learned about the energy industry. From there, he decided to explore his passion in marketing by working for a prominent online marketing agency in Austin, TX. He then decided to start his own online marketing agency and has since become vital asset to the growth of Team Solar's marketing and operations departments.



## **SAGE ENGINEERING ASSOCIATES, LLP**

9 Columbia Circle, Albany, NY 12203 (518) 453 6091 F (518) 453 6092

### **FIRM QUALIFICATIONS**



Sage Engineering Associates, LLP is a firm of seasoned professional engineers who provide mechanical, electrical and structural engineering design services to institutions, industry, and other building owners. Our office location at 1211 Western Avenue, Albany, New York, makes us convenient to the Adirondack Northway and the New York State Thruway.

Our staff of thirty includes seventeen individuals with 4- or 5-year professional degrees, three with master's degrees, and eleven licensed professionals. In addition, five of our professional staff are LEED® Accredited Professionals. Total combined staff experience approaches 500 years and many have worked together for over ten years.

Our team has expertise in a wide variety of engineering disciplines serving clients in the commercial, institutional, and industrial fields. Their work has been published, has received national recognition, and is well recognized in the professional community for innovative and skillful design solutions for both new construction as well as in renovation/adaptive reuse projects. Our professionals have broad engineering experience that includes the following:

#### **MECHANICAL**

- Heating, Ventilation & Air Conditioning
- Laboratory Ventilation Systems
- Fire Protection
- Plumbing
- Central Plant Boiler
- High Temperature Hot Water Distribution Systems
- Low, Medium & High Pressure Steam Distribution Systems
- Site Distribution Services
- Process Pumping & Piping Systems
- Controls, Instrumentation & Energy Management Systems
- Installation & Removal of Fuel Oil Storage Tanks
- Indoor Air Quality Evaluation & Improvement

#### **ELECTRICAL**

- Facilities Power Distribution
- Site Underground & Aerial Power Distribution
- Lighting Systems
- Sports Lighting Systems
- Fire Alarm Systems
- Security Systems
- Cable & Community Television Systems
- Telephone & Intercom Systems
- Data Systems
- Computer Networking Systems
- Short Circuit Analysis
- Uninterruptible Power Supplies
- Emergency Generator Systems
- Electrical Substation Design

#### **STRUCTURAL**

- New Construction Design utilizing concrete, masonry, structural steel, cold-formed steel and wood structural systems
- Foundation & Retaining Wall Design
- Structural and Seismic Evaluation of Existing Buildings
- Structural and Seismic Rehabilitation of Existing Buildings
- Retrofit and Strengthening Design of Deficient Structures
- Construction Observation and Special Inspections
- Structural Systems Feasibility & Cost Studies
- Forensic Engineering





**Evan C. Walden, P.E.**

Principal and Project Manager

Mr. Walden is a founding partner of Sage Engineering Associates, LLP. In this capacity is actively involved in the design of new facilities, renovations to existing buildings and systems, and forensic investigations related to buildings.

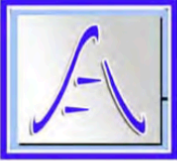
Mr. Walden has an undergraduate degree in Mechanical Engineering and a Master's Degree in Business Administration. He is a Professional Engineer registered in New York, Indiana, and Washington, D.C.

Mr. Walden is active in Professional Organizations including: Past President of the Northeast Chapter of the American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) and Association of Facilities Engineers (AFE). He has published papers on Indoor Air Quality Investigations and Factors to Consider for a Plant Expansion. He has taught numerous courses on ventilation system design, statistical process control, lead hazard training, confined spaces training, and indoor air quality assessment and remediation and has led seminars on Sick Building Syndrome.

As a founding partner of Sage Engineering, Mr. Walden has been responsible for the following projects:

- 1475 Washington Avenue Extension, Albany, New York  
Private Student Housing
- 1385 Washington Avenue Extension, Albany, New York  
Private Student Housing
- Renovations to Springs Building, Wesley Health Center  
Senior Retirement Living Facility
- The Enclave, Windham Mountain, Windham, New York  
Design of New Private Luxury Condominium Facility
- Teresian House Adult Living Center, Albany, New York  
Various Renovations
- Renovations to Various Dormitory Facilities, State University of New York at Albany  
Ten University Dormitory Renovations
- Montgomery Meadows Residential Health Care Facility, Amsterdam, New York  
Various Mechanical and Electrical Systems Renovations
- Barnwell Nursing Home, Valatie, New York  
New Addition and Various Building Renovations
- Sisters of Saint Joseph Provincial House, Latham, New York  
Master Plan





## HOUSING PROJECTS

Firm Experience

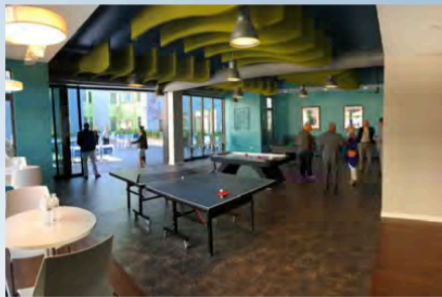
### **Private Student Housing Apartments State University of New York, College at Albany** Albany, New York



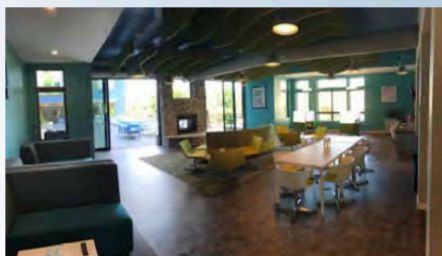
Sage Engineering provided mechanical, electrical, plumbing and fire protection design for the construction of a new, private student housing complex located across from the main entrance of the State University of New York at Albany. This project consists of 322 beds in 106 individual units, permitted for single resident occupancy. Each individual unit is complete with a private bathroom for every bed, a common kitchen featuring stainless steel appliances and granite countertops and a common lounge space.

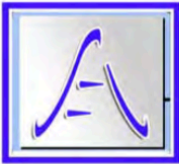


The building includes two levels of garage parking beneath the apartments, full time concierge service, a fitness center, first floor individual study spaces and a common indoor/outdoor gathering area.



The project includes individual gas-fired furnaces with electric cooling, central domestic hot water heating and energy recovery ventilation for the building.





## HOUSING PROJECTS

Firm Experience

### **The Enclave Design of New Condominium Building**

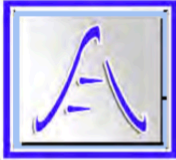
Windham, New York



Sage Engineering Associates, LLP provided mechanical, electrical, plumbing, and fire protection engineering services for the design of a new 5-story condominium building consisting of 35 individual condominium residences, underground parking facility, 4-season outdoor pool, fitness facility, common entertainment spaces, sales office, club space, and ski storage facility. The building was completely air conditioned and included central distribution of domestic hot water.







## HOUSING PROJECTS

Firm Experience

### **SUNY – University at Albany Renovate Dormitories Various Dormitories - Uptown Campus**

Albany, New York



Sage Engineering Associates, LLP provided mechanical, electrical, fire protection, and plumbing design services for the gut renovation of existing 3-story plus basement dormitory buildings at the uptown campus. The existing building layouts were modified to provide private toilet facilities in new occupant suites to replace the original ganged toilet facilities. The electrical systems were rehabilitated to provide new Category 6 network cabling, telephone wiring, and CATV cable system to each sleeping unit from existing building distribution system; new interior lighting, new feeder and power distribution equipment with branch circuits to each room and the HVAC equipment as well as existing exterior lighting; and new addressable fire alarm systems with connection to the University's monitoring system. A low temperature heating distribution system fed from a connection to the existing site high temperature hot water distribution system provided building heat. The building was provided with a complete NFPA sprinkler system.

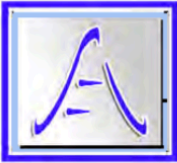
The dormitories renovated included the following:

- Onandaga Hall (includes air conditioning)
- Herkimer Hall (includes air conditioning)
- Oneida Hall
- Melville Hall
- Hamilton Hall
- Ten Broeck Hall
- Tuscarora Hall
- Whitman Hall
- Tappan Hall (includes air conditioning)

**SAGE ENGINEERING ASSOCIATES, LLP**  
WWW.SAGELLP.COM







## HOUSING PROJECTS

Firm Experience

### **Teresian House Adult Living Center**

#### **Various Projects**

Albany, New York



Sage Engineering has provide engineering design and investigation services for a number of projects at the Teresian House, including the following:

- Study to determine cost effectiveness of electrical co-generation.
- Study to determine cause of building negative pressurization.
- Design for building makeup air system installation.
- Design for new building interior space heating/cooling systems.
- Study for kitchen rehabilitation project.



**SAGE ENGINEERING ASSOCIATES, LLP**  
WWW.SAGELLP.COM





### TONY L. MOSCOLLIC, P.E., PRESIDENT

Professional Registration:	Pennsylvania Ohio West Virginia
Formal Education:	The Pennsylvania State University <i>Bachelor of Architectural Engineering</i>  Robert Morris College <i>Master of Business Administration</i>

Mr. Moscollic is the President and founder of Keystone Structural Solutions. Previously, he managed the Pittsburgh office of The Kachele Group for 15 years. He has over 25 years of engineering experience.

Mr. Moscollic's unique blend of engineering and business experience enables him to effectively communicate with all team members during the duration of a project. He has provided structural consulting engineering services to architects, contractors, developers and private owners.

Mr. Moscollic graduated from The Pennsylvania State University in 1986 with a degree in Architectural Engineering emphasizing structural design. In 1995, he received a Master of Business Administration degree from Robert Morris College.

During his more than 25 year career, Mr. Moscollic has been employed by a variety of consulting engineering firms, a manufacturing firm and a transportation/delivery firm. This experience provides insight into several different industries. From 1997 to 2012, Mr. Moscollic managed the Pittsburgh office of The Kachele Group. In 2008, he was promoted to Vice President of the firm.

Mr. Moscollic has presided over the design of many types of building structures that range from single family residential to high rise commercial buildings. He has provided structural consulting engineering services to architects, contractors, developers, private owners and attorneys, including expert testimony.

Mr. Moscollic is active in the community, enjoys most spectator sports and regularly plays golf and basketball.

8150 Perry Highway, Suite 302, Pittsburgh, PA 15237

Phone: 412-369-9020

Fax: 412-369-9021

[www.kss-eng.com](http://www.kss-eng.com)



FOUNDED

**1911**

TEAM MEMBERS

**400+**

LICENSED PEs

**125**

ENR TOP 500  
DESIGN FIRMS

**222**

ZWEIG GROUP

BEST FIRMS  
TO WORK FOR

## FIRM OVERVIEW

For more than a century, Tighe & Bond has been a leading multi-disciplinary consulting firm in the Northeast, manifesting its clients' vision for a better built environment by providing full-service engineering, landscape design, site planning, and environmental services. Innovative thinking and exceptional service have always been at the core of our work.



**Our Creativity Makes it Possible.**  
**Our Experience Makes it Practical.**

## SERVICES

Building Services

Coastal and Waterfront Solutions

Environmental Consulting

GIS/Asset Management

Resiliency & Sustainability

Site Planning & Design

Transportation Engineering

Urban Design & Planning

Water & Wastewater Engineering





---

# FORMER STATE HOSPITAL REDEVELOPMENT

## WESTBOROUGH, MA

### OWNER

Town of Westborough

Massachusetts Division of  
Capital Asset Management and  
Maintenance (DCAMM)



---

### SERVICES

Licensed Site Professional (LSP)  
Services

Underground Storage Tank  
Removal Assessments

Hazardous Building Materials  
Surveys, including Asbestos, Oil/  
Hazardous Materials (OHM),  
Polychlorinated Biphenyls (PCBs)

Demolition Planning

Construction & Demolition Debris  
Management Planning

Redevelopment Permitting Planning



Tighe & Bond's involvement with the Former Westborough State Hospital first started with environmental support to DCAMM related to performing environmental site assessments, Licensed Site Professional (LSP) services and site remediation related to underground storage tank removals. The property was subsequently transferred from DCAMM to the Town of Westborough to allow the Town to help advance redevelopment efforts. Tighe & Bond was retained by the Town to help define the various environmental issues that may be present associated with the site's history. This information was incorporated into the Town's comprehensive master planning efforts.

As redevelopment interest increased and knowing how the existing complex network of interconnected buildings and tunnels represented unknown environmental risk to developers, it was necessary for the Town to further define these issues. Tighe & Bond performed a comprehensive evaluation of over 30 structures and underground tunnels. The evaluations focused on the identification of regulated building materials, including asbestos, lead paint, PCBs and various containers of oil/hazardous materials and the evaluation of site cleanup and demolition strategies.

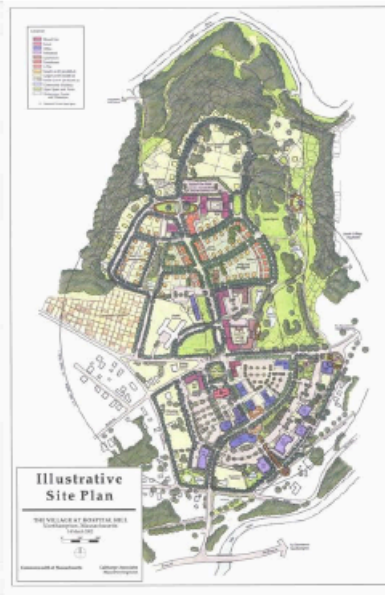
Since the completion of the Town's redevelopment planning efforts, the Town was able to successfully attract interested parties to transform the property. The existing buildings have been safely abated and demolished, while other environmental issues have been addressed. Residential condominiums now line the hillside overlooking Chauncy Lake.

---

# NORTHAMPTON STATE HOSPITAL SITE REDEVELOPMENT

## NORTHAMPTON, MA

**OWNER** MassDevelopment



The former Northampton State Hospital (NSH) campus included approximately 50 buildings on 124 acres constructed beginning in the 1850s and shuttered in 1993. Today, the site is slated for redevelopment through a public-private partnership as a result of efforts by the Commonwealth, the City of Northampton, and local citizens to provide a forward-looking, economically viable use for the site.

Tighe & Bond provided demolition consulting services for the NSH redevelopment, including detailed inspection of over 30 buildings to determine areas of the complex where friable asbestos-containing materials had the potential to be released to the environment. Other work under this contract included the preparation of bid documents for asbestos abatement and demolition of over 20 buildings and security barrier installations on numerous buildings to remain.

Epsilon Associates and Tighe & Bond joined forces to prepare an environmental impact report for the NSH redevelopment project. Tighe & Bond evaluated the impact of the proposed redevelopment on the on-site and off-site utility network. Further, our team analyzed options for managing stormwater drainage from the site in accordance with the Commonwealth's Stormwater Management Policy.

Tighe & Bond also provided engineering services on a number of road and infrastructure improvement projects, some funded by the MA Community Development Action Grant (CDAG) program, including the following:

- South Campus Stormwater Treatment/Mitigation Detention Basin 5
- North Campus Stormwater Treatment/Mitigation Detention Basin 4
- Stormwater Discharge Outfalls to the Mill River

We also assisted MassDevelopment with infrastructure and roadway improvements funded with a U.S. Department of Commerce Economic Development Administration Grant (EDAG).

In addition, Tighe & Bond also provided engineering services for this project on an "as-needed" basis. Services have included the successful preparation of the Special Permit Application for the proposed subdivision for the Northampton Planning Board, evaluation of main access road alignment alternatives, construction cost estimates, detailed evaluation of existing water and sewer utilities, and preliminary geotechnical investigations

---

## SERVICES

Public/Private Redevelopment  
Demolition Consulting  
Environmental Impact Report  
Stormwater Management  
Roadway and Infrastructure  
Improvements



---

# BELCHERTOWN STATE HOSPITAL ABATEMENT AND DEMOLITION

BELCHERTOWN, MA

## OWNER

MassDevelopment



---

## SERVICES

Demolition Consulting

Asbestos and Hazardous Materials  
Audit

PCB Evaluation of Building  
Materials

Report of Findings

Structural Evaluation

Tighe & Bond provided demolition consulting services for various buildings at the former Belchertown State Hospital including three cottage buildings, former Administration Building, and the former Hospital Building as well as a one story garage and one story trailer. We also conducted inspections within a series of underground pipe tunnel systems throughout the proposed re-use area.

Our audit team, consisting of two licensed asbestos inspectors, conducted an asbestos and hazardous materials audit to generate an inventory of materials and equipment that will likely require abatement and mitigation prior to building demolition / renovation. This effort included sampling and analysis of potential asbestos-containing materials (PACM) and building construction materials having potential to contain polychlorinated bi-phenyls (PCBs). The work also involved visual observation and characterization of hazardous components.

Inventory Tables and a technical memorandum summarizing our asbestos, hazardous materials and PCB audit results were prepared for future inclusion in the Contract Documents. We also prepared an opinion of probable asbestos and hazardous materials abatement costs.

During the audit, our engineers/asbestos inspectors observed conditions within and in the vicinity of the buildings / site to document existing conditions. This included underground tunnel systems, paved areas, fire hydrants, abutters, site security and site features to be protected. We recorded this information on a Site Map which displayed specific locations of the referenced items to aid in planning for future property re-use.

Tighe & Bond also conducted a visual inspection of the Administration Building to identify structural deficiencies and attempt to determine the feasibility for re-use. We summarized our findings in a technical memorandum.



---

# FORMER STATE HOSPITAL REDEVELOPMENT & RIVERWALK

NORWICH, CT

## OWNER

Preston Redevelopment Agency



---

## SERVICES

Licensed Environmental  
Professional (LEP) of Record  
Environmental Site Assessment  
PCB Assessment and Closure  
Remedial Design  
Remedial Oversight

Tighe & Bond is providing Licensed Environmental Professional (LEP) and PCB consulting services for the redevelopment of the former Norwich State Hospital property. The former hospital site is a significant regional brownfield which contained approximately 55 deteriorated structures on 390 acres of land. The Preston Redevelopment Authority (PRA) is working with the Mohegan Tribal Gaming Authority (MTGA) who plans to invest \$600 million and redevelop the site into a regional entertainment and mixed use center known as the Preston Riverwalk. This is one of the largest brownfield redevelopment projects in the northeast.

Tighe & Bond is in charge of overseeing all environmental site investigations, remediation, and permitting efforts. In this role we coordinate with CTDEEP, EPA, DECD, and the MTGA. We also have assisted the PRA with brownfields funding applications from DECD and EPA sources.

Tighe & Bond investigated and provided an evaluation of remedial alternatives for 44 Areas of Concern (AOCs) at the site. We developed innovative approaches for closing AOCs by consolidating impacted soils on-site and capping with on-site borrow and clean demolition materials thereby saving cost. Tighe & Bond also investigated and provided remedial observation for PCB-impacted media at over 20 former transformer rooms as well as a building impacted with PCB caulking.

Tighe & Bond has also developed a demonstration document for submittal to CTDEEP to allow several thousand gallons of No. 6 oil to remain in place. The material is not impacting groundwater significantly and the cost to remove would be prohibitive for the project.

## Project Portfolio

Mixed-Use and Transit-Oriented Development



PLANNING + DESIGN EXPERIENCE

**HALVORSON**

**Tighe&Bond** STUDIO

25 KINGSTON STREET, 5<sup>TH</sup> FLOOR  
BOSTON, MA 02111

T 617.536.0380

[WWW.HALVORSONDESIGN.COM](http://WWW.HALVORSONDESIGN.COM)





## ABOUT US

Halvorson | Tighe & Bond Studio provides professional landscape architecture, site planning and urban design services throughout New England and the eastern United States from its Boston studio with the support of Tighe & Bond's ten additional offices. Since 1980, Halvorson has helped municipalities, institutions, public agencies and private organizations realize their goals for exemplary landscapes and open spaces.

We have built our practice on a foundation of long-term client relationships, and our principals and staff are dedicated to listening and developing a comprehensive perspective prior to beginning design work.

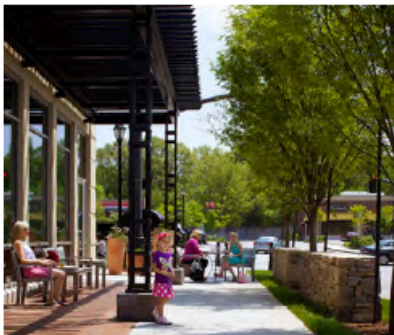
Halvorson is known for design commissions that lead to fully realized, lasting projects—a testament to our emphasis on flexible spaces, durable materials and community consensus. We believe the best solutions result from careful investigation and robust collaboration with all those involved in project planning, development, maintenance, and use.



## MIXED USE + TRANSIT-ORIENTED DESIGN

As designers of open space within transit-oriented and mixed-use developments, Halvorson balances the needs and desires of disparate user groups to create memorable, attractive civic experiences. By prioritizing pedestrians, we enhance visual and physical connections while activating building edges, resulting in vibrant pathways and destinations.

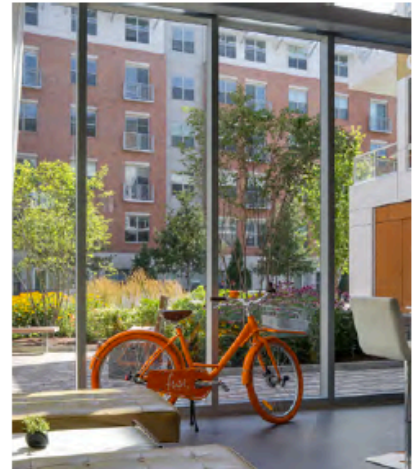
Transit-oriented open space demands a flexibility that adapts to the varying scales and needs of the urban context. We integrate urban streetscapes and indoor/outdoor environments to promote stress-free connections between work and home, reinforcing healthy lifestyles and resulting in memorable civic destinations that people come back to again and again.



Halvorson's experience with outdoor restaurants, semi-public plazas, parklets and attractive multi-modal streets reinforces private mixed-use destinations with a public realm that complements the daily user experience. Our designs feature an attention to detail; technical knowledge of hardscape; horticultural excellence; and understanding of urban planting and resilience that are unsurpassed.

Pictured: Atlantic Wharf, Boston, MA; City Hall Plaza + Government Center Transit Station, Boston MA; Linden Square, Wellesley, MA; 3rd Avenue, Burlington, MA





**Fuse is a new pedestrian-friendly residential development in the growing Alewife Triangle neighborhood of Cambridge. Located at the end of the MBTA's Red Line and adjacent to the Alewife Brook Reservation, this multi-family development features views and access to the neighborhood's unique natural landscape within an urban setting.**

The site maintains connectivity to the nearby mass transit hub through an extensive network of bike and walking paths. Teaming with DiMella Shaffer Architects, Halvorson designed the streetscape, entry courtyard, green roof and pool patio for the new residential building. The parking level was split to create a ground floor lobby and at-grade courtyard that provides dramatic visual connections to the Alewife Reservation beyond.



**Breakwater is the first development project in the master-planned transformation of Lynn's industrial waterfront into a vibrant, publicly accessible open space.**

Remediating a former industrial site that had been abandoned for decades, this transit-oriented, multi-family development will bring 332 market-rate apartments overlooking Lynn Harbor and a two-acre waterfront park.

Working in collaboration with Lynn Redevelopment LLC, HDS Architecture, and DCR, Halvorson developed the site and landscape design and assisted with permitting for the project.

Residents and visitors will be welcomed to the site via a meandering harborwalk with naturalistic planting, sculptural landforms, and site features constructed of reclaimed remnants of the granite seawall. Three scenic overlooks and a children's playground complement the restful strolling experience offered by the park.

Striving for sustainability on multiple levels, the site design features environmentally friendly materials such as permeable paving, LED lighting, and a native plant palette. The resilient waterfront design also includes lower-level parking, topography shaped to allow flood retreat, and tree planting at elevations above the flood level.



**ONE BOSTON WAY TRANSIT-ORIENTED DEVELOPMENT**  
Newburyport, MA



**Halvorson is working with MINCO Development and architects GSD Associates to transform a former MBTA parking lot into a new transit-oriented, multifamily residential community that will form Newburyport's first Smart Growth District.**

The site, located adjacent to the MBTA commuter rail station, provides access to commuter rail service to Boston as well as a link to the Clipper City Rail Trail, which connects to the riverfront and downtown Newburyport.

Halvorson developed a plan for the site that creates a buffer between the residences and the commuter rail station while providing an inviting and improved connection to the existing rail trail.

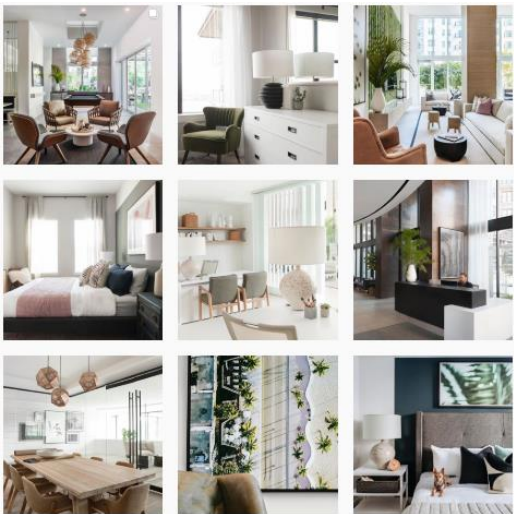
Adjacent to the building, a courtyard offers tenant amenity space for socializing, gathering, and community building.

**HALVORSON DESIGN PARTNERSHIP**





# CID DESIGN GROUP



visit our website to request the latest design forecast +  
follow us on **Instagram** @cid\_designgroup

O: 239.495.3806  
www.cid-designgroup.com  
design@cid-designgroup.com



**CID DESIGN GROUP**

## Support Team Bios and Key Projects – CID Design Group



Jenn Zella is the co-founding principal, Chief Visionary Officer of CID Design Group, an interior design, branding and forecasting firm specializing in hospitality and multifamily sectors, with clients in 35 states and 60 cities, including Canada, Latin America and the Caribbean.

An education in finance, construction and interior design has allowed Jenn to uniquely position CID offering insight and value to clients beyond the typical design engagement.

Jenn has fueled CID's growth over the past decade rising from #83 to #10 and #1 in growth on interior design magazine's 2018 rising giants list, to most recently landing the #86 spot on the 2019 giants list. Jenn passionately fosters a unique culture of action, positivity, play, curiosity and team, making CID a vibrant, fulfilling and effective workplace.

Since 2013, Jenn has passionately championed and published a quarterly design forecast which serves the industry, clients, manufacturers, and major educational institutions as a useful tool to create engaging, unique, and long-lasting spaces and brands. Jenn's commitment to research-based design has distinguished her as an industry "go-to expert" and is routinely engaged to speak about emerging trends and forecasting.

"In this hyper evolving time we must visualize tomorrow to be ahead."

### speaking engagements:

- Crescent Communities Annual Conference. Fall '19 Atlanta
- Dawn McKenna Group Coldwell Bankers International Luxury Alliance (ILA), Summer '19 Chicago
- Lennar National Development and Management Webinar, Spring '18
- Crescent Communities Investors Conference, Fall '17
- Crescent Communities Forecast Presentation, Winter '17
- Bell Partners Forecast Presentation, Summer '16
- Greystar Southeast Regional Conference, Spring '16
- Greystar Design Forecast WEBEX, Fall '16
- Carmel Partners Annual Development Conference, Winter '16
- Charlotte Apartment Association, Winter '16
- Austin Apartments Association, Spring '15
- Greystar's Design Forum, Austin TX Fall '14

### best design tip:

Less is more.

### best advice:

I used to hide my work and not want others to copy it or see it until it was complete. My art & drafting instructor, brother Vincente Balog, taught me a lesson one day that has resonated every day since. He grabbed my partially completed drawing and shared it with the class and asked another student to use it as a springboard for their project. He pulled me aside after class and said that the only way we improve is by sharing ideas, collaborating, and allowing yourself to be inspired by other's ideas! I think of him and his advice often!

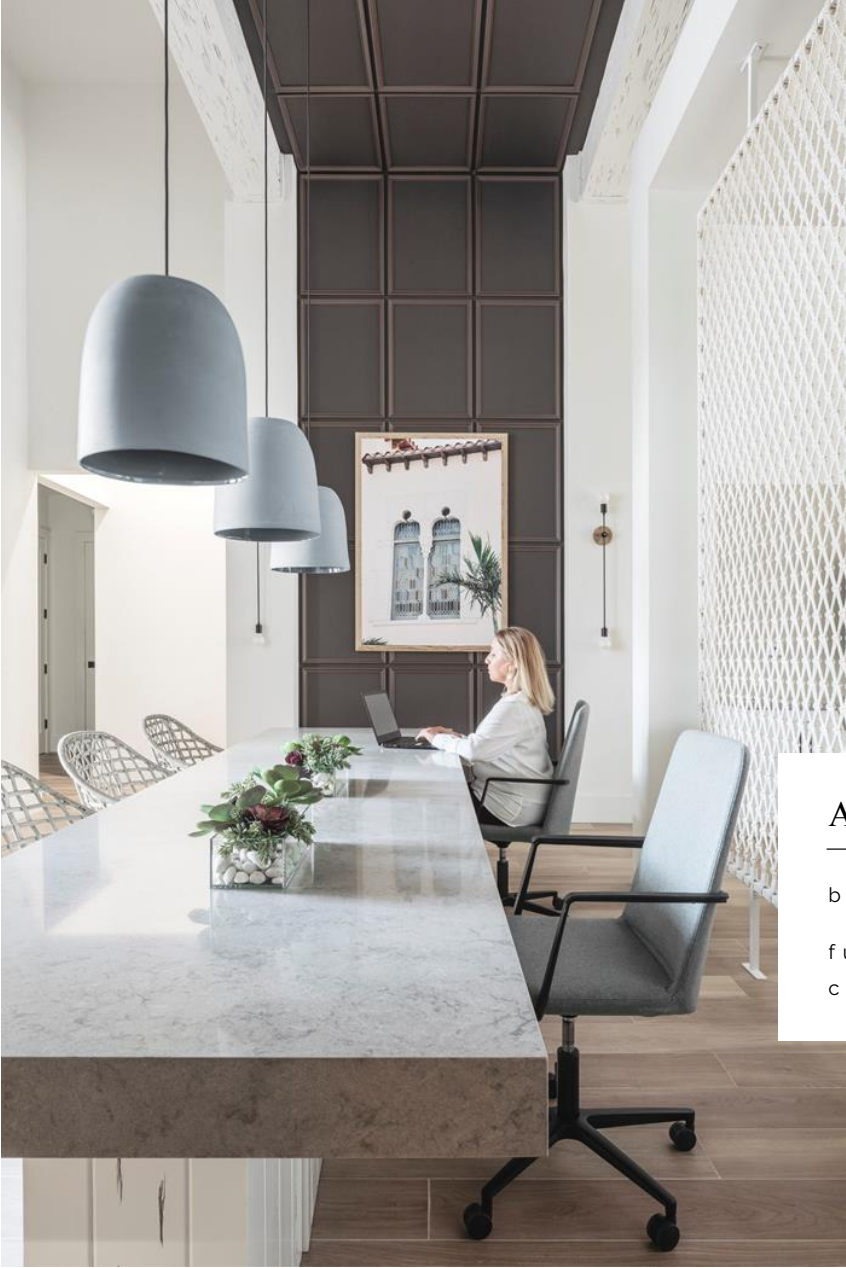
### hidden talent:

Heptathlete. Former professional jazz dancer. Secret obsession with weather and climate.

### trip of a lifetime:

Buenos Aires, Argentina with my dear friend, a resident at the time.

**Support Team Bios and Key Projects – CID Design Group**



**AVALIA**  
boca raton, fl  
full scope interior design + ffe  
completed 2019



**Support Team Bios and Key Projects – CID Design Group**



**THE HUNTLEY**  
buckhead | atlanta  
full scope interior design + ffe  
completed 2018



**HALCYON**

ALPHARETTA, GA

## A.1.f Description of Other Real Estate Owned

GSX Ventures, LLC – Select, additional real estate owned by include:

The Auden	Wadsworth Place
1385 Washington Avenue	1300 Wadsworth Blvd
Albany, NY	Lakewood, CO
Property Type: Multi-family	Property Type: TOD/Mixed-Use Multi-Family
Property Class: Class A	Property Class: Class A
Number of Units: 133	Number of Units: 380
Size (SF): 250,000 (incl. integral parking)	Size (SF): 350,000 (incl. integral parking)

Other Properties (as part of larger portfolio):

1. Aspen at Amherst- 408 Northhampton, Rd., Amherst, MA  
Multi-Family – Class A – 105 Units Size: 47,745 GSF
2. Sage at Hudson – 253 Washington Street, Hudson, MA  
Senior Housing - Class A – 92 Assisted & 60 Independent Units - Size: 160,000 SF (incl. integral parking)
3. Bay Village Annapolis – 100 Bay Village Drive, Annapolis, MD 21403  
Senior Housing – Class A - 92 Assisted Units - Size: 110,000 SF (incl. integral parking)
4. The Dakota - 1211 Western Avenue, Albany, NY  
Multi-Family – Class A 127 Assisted Units – Size: 175,000 SF (incl. integral parking)
5. Galleria at Loudonville – Albany, NY  
Mixed Use (Retail & Senior Housing) – Class A – Retail Size: 26,000 SF  
Senior Housing: 92/Assisted & 85/Independent – Size: 250,000 SF (incl. integral parking)
6. Regency Park – 730 Maryland Route 3 Gambrills, MD 21054  
Senior Housing – Class A – 65/Assisted – Size: 45,000 SF.

Further information on a specific property and/or GSX Ventures' current portfolio can be made available upon request or available at [gsxventures.com](http://gsxventures.com).



## **Urban Revitalization Experience**

**GSX Ventures has a long history of redeveloping urban and suburban sites and building into economically vibrant new projects.**

**The following list outlines some of our most significant site and building repurposing and revitalization projects**

### **Academy Place, Sewickley PA.**

9 Luxury Townhomes on the Site of the former American Standard Mansion

### **Forbes Allies Center, Pittsburgh, PA.**

Professional Office Center from an existing Printing and Manufacturing Facility

### **Hamilton Hill Assisted living Facility, Pittsburgh, PA.**

65 bed, Assisted Living Facility from a former Catholic Nun's Residence

### **Regency Park, Assisted Living facility, Gambrils, MD.**

65 bed, Assisted Living Facility from a former drug treatment center

### **8 ½ Canal Street, Richmond, VA.**

600 Bed Student Housing Apartment Complex on the urban site of a warehouse complex

### **1200 West Marshall Street, Richmond, VA.**

400 Bed Student Apartment Complex on the urban site of a manufacturing and ice house complex

### **275 Thayer Street, Providence, RI.**

300 Bed Student Apartment Project on the site of a decaying urban housing block

### **The Varsity on Charles, Baltimore MD**

350 Bed Student Apartment Project from an existing 1926 apartment building

### **1475 Washington Ave. Albany, NY**

270 Bed Student Apartment Project Apartment on the urban site of a storage facility

### **1385 Washington Ave. Albany, NY**

345 Bed Student Apartment Project on the site of a former Hotel

## **Urban Revitalization Experience (continued)**

### **1211 Western Ave, Albany, NY**

254 Bed Student Apartment Project on the urban site of an office building

### **Sage at Hudson, Assisted and Independent Living Community, Hudson, Ma.**

92 bed assisted Living and 60 unit independent Living Community on the site of a former residential compound

### **The Village at Wadsworth, Lakewood, Co.**

380 Unit Transit Oriented Apartment and Retail Complex on the urban site of a former ATV dealership, beauty academy, and Apartment House

### **Aspen at Amherst Apartments, Amherst, MA.**

120 Unit Apartment Project on the urban site of an existing motel complex

### **Sage at the Galleria, Assisted and Independent Living Facility, Loudonville, NY**

92 Bed Assisted Living facility with 60 Independent Living Apartments on the site of a former Amusement Park

### **The Galleria in Loudonville**

A Mixed Use Retail and Residential community on the site of a former amusement park





## **A.2. Project Narrative**

### **a) Description of the Project**

The development of 27 Upton Street poses a number of challenges and opportunities. The project solution we propose contemplates and elegantly resolves most issues with a historically sympathetic high density 136 unit luxury senior living rental community situated above a covered parking garage and approximately 7,800 square feet of ground floor retail. Adjacent to the luxury senior living building is a barn structure that will be renovated to accommodate a beer garden and gathering space.

The ground floor retail will serve a variety of tenants including a restaurant, prepared food and wine pantry, a doctor's office, physical therapy office, and home healthcare service provider. These tenants will allow residents to access healthcare on an as-needed-basis. Both the luxury senior living building and the renovated barn will be connected to downtown Grafton through the construction of a 6' wide sidewalk. The project team hopes the development will serve as an extension to downtown and will provide downtown small businesses and retailers with additional customers.

### **Summary of Site and Architectural Design**

The site for the 27 Upton project consists of approximately 7 acres of land bounded by Upton street to the south, Norcross Park and Chestnut Street forest to the north, train tracks to the west, and Chestnut Street forest to the east. The parcel boundaries meander around a duplex and a post office on Upton street.

Currently the site of the 27 Upton project is owned by the Town of Grafton Tree Department. The site is adjacent to a post office building and a duplex. The project team wishes to acquire the duplex and use the space for additional parking. The post office building has plans to be changed to retail, which would further contribute to the extension of downtown Grafton and the activation of retail in the area.

On the portion of the property currently occupied by the Town of Grafton Tree Department, the project will host the luxury senior living project, covered parking, and ground floor retail. The luxury senior living building will contain a large clubhouse with a demonstration kitchen, a fitness center, conference rooms, group workspaces, and a gathering area that looks out to a central courtyard.

On the eastern portion of the site, the project team plans to renovate the historic barn structure. The project team plans to repurpose the barn structure to be an inviting gathering space that would be attractive to a retail tenant for a beer garden, wine garden, or farmers' market.

The luxury senior mixed-use building will be a wood-framed building above a concrete transfer slab. The building will have a high level of security features and will be sprinklered. There will be a combination of 1 and 2 bedroom units that are either handicap accessible or can be converted to be handicap accessible. Residents will be able to easily travel from their units to the downstairs retail by utilizing one of the three elevator towers proposed as part of the building. Residents will be protected from weather conditions when walking to their vehicles, since the lobby of the building connects directly to the parking garage.

The building's design is intended to harmonize with downtown Grafton. Residents and visitors to Grafton can access the property by walking down the proposed 6' sidewalks that will connect downtown Grafton to the project location. Along the way they will pass the historic barn, repurposed into use as a beer garden and gathering space. As they get to the luxury senior living building they will be faced with an inviting front building façade that features awnings, store fronts, and 15' deep porches that allow the restaurant to accommodate outdoor dining.

## **A.2. Project Narrative**

### **b. Engagement of municipal boards, committees, and the community in shaping the project**

27 Upton was designed to respond to a number of key goals that revolve around sustainability, community support, environmental sensitivity, and economic viability. These goals were as follows:

- Produce a housing project that would be architecturally attractive, economically viable with 10% affordable housing units, that provides the city with a broader tax base.
- Design a building that will harmonize with downtown Grafton.
- Expand downtown Grafton to additional retailers and residents by constructing sidewalks and walking trails.
- Minimize the parking on the site by using garages that decrease the site coverage producing large green outdoor areas and minimizing storm water run-off.
- Create a Sustainable LEED Certified Building using the roof areas for solar collection and sustainable building materials in its construction.
- Create a space for retailers to contribute to the urban fabric by providing outdoor dining services and community gathering spaces.
- Respect all wetlands and wetland buffers.

Beyond the goals we have set for the community it is our intent is to actively engage community stakeholders and neighboring business owners, learn about potential concerns and needs, and incorporate their feedback as early in the entitlement and design phase as possible. This requires an open dialogue with government officials and community residents but helps create a collaborative environment that typically leads to win-win outcomes.

# **Community Engagement Plan**

## **Project Goals:**

1. Density and Early Stages of “Place Making”;
2. Provide Affordable Housing;
3. Connectivity (expanded Pedestrian and Bicycle Walkways);
  - a. Connect property to downtown Grafton and new Library
4. Active and Passive Recreational Space for Residents:
  - a. Create a system of walking paths around the site for exercise
5. Retail/Commercial use to serve as an extension of downtown Grafton.
6. Harmonize with downtown Grafton.
7. Explore Opportunities for Solar Energy;
8. Develop a plan that minimizes the amount of surface parking, thus storm water runoff;
9. Create a commercial component that can accommodate professional and service office uses, as well as food and beverage establishments, without impairing the parking of the residential component;

## **Community Benefits:**

- Revitalizing a site that is no longer in use and turning it into a tax ratable community asset;
- Create new amenities and services that will be attractive to seniors
- Bring in new residents to activate retail and invigorate downtown Grafton with new potential customers
- Anchor / Gateway to downtown Grafton along Upton Street
- Pedestrian friendly sidewalks along Upton, connecting residents to New Library and retail offerings
- Potential use of discreet solar panels on the roof which are screened by parapet walls that provide energy for the site and reduces carbon footprint of the project;
- Low impervious cover requirement for higher-density use; residential units above covered parking dramatically reduces the building footprint
- New retailers will enhance and expand downtown Grafton, making it more attractive to visitors and residents



## **Stakeholders**

### Area & Town Commissions, Committees and Neighborhood Associations:

1. Town Council
2. Tufts School of Veterinary Medicine & Grafton Science Park
3. Grafton Land Trust
4. Historical Commission
5. Affordable Housing Trust
6. Economic Development Commission
7. Central Massachusetts Regional Planning Commission
8. Worcester Business Development Corporation and CenTech Park
9. Planning Board
10. MBTA
11. Tax Incrementing Financing Committee
12. Traffic Study Committee
13. Grafton Job Corps Center/U.S. Department of Labor

### **Engagement Ideas:**

1. Engage and Present to Private Non-Profit and For-Profit Business and Land Development Companies.
2. Create a development website to track the design progress of the project and allow resident to offer ideas and concerns that can be considered at stakeholder meeting. This website would also be an interactive link to get information out to residents and minimize false information.
3. Solicit Feedback from Town officials for opportunities to increase connectivity to existing Bicycle and Pedestrian Networks.
4. Promote Awareness of the Project through traditional (i.e. community newsletters and The Grafton News) and new media formats (Facebook, Twitter, Instagram, etc.)
5. Organize town hall-type question and answer forum for neighboring businesses.

## **A.2. Project Narrative**

### **Economic Impact**

Aside from the community benefits that the project will generate, the Town will realize significant, positive economic impacts at each phase of the site's redevelopment. Beginning with the transfer of ownership, the property will immediately become part of Grafton's tax base and will generate taxes through the construction period. Also, while non-recurring, the combination of building permits, trade-related inspections, and water entrance fees is anticipated to provide the Town with approximately \$955,000 to \$1,055,000 in additional revenue. Together with the offer price of \$650,000, this represents one-time fees of nearly \$1,700,000. Property taxes during construction will add an additional \$300,000 of revenue, for a total of \$2,000,000 in the first three years of the project's life.

When viewed holistically with the estimated annual tax revenue listed below, which we believe is the most appropriate context to view our Firm's proposal, the full economic benefit to the Town becomes clearer. The decision to develop a luxury, high-density, building that harmonizes with downtown and selecting a product type, particularly structured parking, that typically requires higher upfront construction costs, was intentional. It is in our opinion, that it will provide the project with the greatest chance for sustained success; and in turn, consistent tax revenues to the Town.

During construction, it is anticipated that a project of this size will generate between 80-150 construction jobs. The Firm has considerable experience developing and owning commercial real estate throughout Massachusetts, including projects in Amherst and Hudson, so it intends to source from its local and regional trade contacts (to the extent possible) to ensure that the project is particularly impactful to Grafton and Worcester County. Grafton should see a temporary rise in its retail and service sector sales as construction employees spend their earnings in and around the Town, although a precise estimate of this type is difficult to make.

At stabilization, the residential component is likely to employ four full-time and several part-time employees (across property management, leasing and maintenance functions), in addition to the third-party vendors that will be responsible for janitorial services, grounds (pool and lawn), preventative maintenance/on-call repairs, and snow removal.

The project's commercial and retail components are anticipated to bring in a variety of jobs. The project's restaurant space is expected to bring about 20 employees, the doctor's office is expected to need 5 employees, the food and wine prep store is expected to have 20 employees, the physical therapy office is expected to have 5 employees, the home care service tenant is expected to bring 3 employees, and the beer garden and event space is expected to need about 20 employees. The retail and commercial components, in total, are anticipated to bring 60-80 employees to the immediate area.

For the purposes of this submission, a fiscal impact analysis has not been commissioned. However, while this project will likely increase the demand for public services to some extent, it is anticipated that our proposed development will generate significantly more in local revenue than in costs. Seniors typically have a much smaller footprint when it comes to local services. Seniors do not burden the education system and they are typically at the point where they have a higher discretionary income. Traffic impacts are also minimal in a senior housing community, since seniors are more attracted to walkable environments and are less likely to use a vehicle on a daily basis.

Since 27 Upton would be the only active adult senior living project within a 25 mile radius of downtown Grafton, the project is anticipated to attract seniors to the town and contribute to its vibrancy and the preservation of its character.

Based on market values of properties sharing a similar profile in terms of size, age, and quality in the City of (and greater) Worcester, the stabilized assessed value per unit is estimated at \$183,000 or approximately \$25,000,000 in total assessed value. Based on Grafton's 2020 Fiscal Year tax rate of \$16.50-per-thousand dollars of value, the development will generate approximately \$412,500 in total, annual tax revenue. Because the Firm's offer does not rely on tax credits or other public financing incentives or contributions, and the Firm is confident in its ability to: (1) secure private financing, and (2) execute and construct the plan depicted here, the above figures represent new receipts that the Town can reasonably expect in the near term. Over a 10 year period, the project is expected to provide the Town with a total tax revenue of at least \$4,125,000.



**c. Zoning Analysis**

With regard to zoning, the Firm’s proposal is consistent with the zoning proposal set forth in in the Village Mixed Use – Gateway District. The only proposed change would be to allow a building of height of up to 55’. This would allow the project to compete in the luxury senior living environment and to have ample ground floor retail. The project will also work at a 45’ height, but we would prefer taller ceiling heights for the residents. The project meets all goals stated in the creation of the Village & Mixed Use Zoning District in Section 12 of the Zoning Bylaws:

12.1.1 Promote development in Grafton’s village and neighborhood centers that encourages a mixed-use environment that is less automobile dependent and more pedestrian-friendly.

12.1.2 Encourage a diverse mix of business, commercial, office, residential, institutional and entertainment uses for workers, visitors, and residents at an appropriate scale for each village and neighborhood center.

12.1.3 Permit uses that promote conversion of existing buildings in a manner that maintains the visual attributes, prevailing settlement patterns, and architectural character of existing development within the district.

12.1.4 Minimize visual and functional conflicts between residential and nonresidential uses within and abutting the district.

12.1.5 Promote pedestrian and bicycle circulation and safety.

12.1.6 Encourage work/live space.

12.1.7 Encourage vibrant public and publicly-oriented private open spaces that enhance the district by reinforcing pedestrian orientation and multi-modal transportation opportunities.

The development conforms with the *Village Mixed Use Gateway*, which proposes that 10% of the units developed be affordable. Table 1 below details the unit counts for market rate and affordable units:

Table 1: Proposed Residential Unit Count	
<b>Market Rate Units</b>	
<b>Unit Type (Bedroom/Bathroom)</b>	<b># of Units</b>
1 Bedroom/1 Bathroom	60
2 Bedroom/2 Bathroom	62
<b>Proposed Sub-Total</b>	<b>122</b>
<b>Affordable Units</b>	
<b>Unit Type (Bedroom/Bathroom)</b>	<b># of Units</b>
1 Bedroom/1 Bathroom	7
2 Bedroom/2 Bathroom	7
<b>Proposed Sub-Total</b>	<b>14</b>
<b>Total 1 &amp; 2 Bedroom Units</b>	<b>136</b>

[2] 10% of the total rental units have been set aside as “Affordable Units”, which has been defined as Low or Moderate Income Persons or Families whose Annual Incomes do not exceed eighty percent (80%) of the Median Income for the Worcester, MA HUD Metro FMR Area.

## **A.2. Project Narrative**

### **d. Historic Preservation**

Our Team intends to begin development of the site by first clearing and abating the existing DPW buildings (and other existing improvements) followed by environmental mitigation for any contaminants that might be present in the soils. The next phase of the development is the construction of the 3 over 1 podium building. The final phase of the development will be to restore the barn to be used as a beer garden or to host a farmers' market.

The team decided that demolition and clearing of the DPW building was necessary due to:

- 1.The structure of the existing buildings was not flexible and hampered efforts to efficiently create housing units;
- 2.The DPW buildings were used primarily for vehicle storage and maintenance and did not have historical significance

The proposed design vocabulary of the new structure's design (as depicted in the early renderings that follow) harmonizes with downtown Grafton. The site plan helps to extend a network of walking trails and sidewalks and will connect and extend the downtown area. The restoration of the barn will provide a nice transition from the historic downtown area to the property.

Technical Proposal | A3  
Conceptual Plans





## **A.3. Project Narrative**

### **1. Building Renovation Plans**

### **2. Preservation of Historic Structures and Features**

### **3. Demolition Plans**

As discussed in section A2d our team intends to begin development of the site by first clearing and abating the existing DPW buildings (and other existing improvements) followed by environmental mitigation for any contaminants that might be present in the soils. The next phase of the development is the construction of the 3 over 1 podium building. The final phase of the development will be to restore the barn to be used as a beer garden or to host a farmers' market.

The team decided that demolition and clearing of the DPW building was necessary due to:

The structure of the existing buildings was not flexible and hampered efforts to efficiently create housing units;

The DPW buildings were used primarily for vehicle storage and maintenance and did not have historical significance

The proposed design vocabulary of the new structure's design (as depicted in the early renderings that follow) harmonizes with downtown Grafton. The site plan helps to extend a network of walking trails and sidewalks and will connect and extend the downtown area. The restoration of the barn will provide a nice transition from the historic downtown area to the property.











SOUTH ELEVATION



SOUTH ELEVATION



GRANT ARCHITECTS

**27 UPTON ST APARTMENTS - CONCEPTUAL STUDY**  
 CONCEPTUAL ELEVATIONS



NORTH ELEVATION



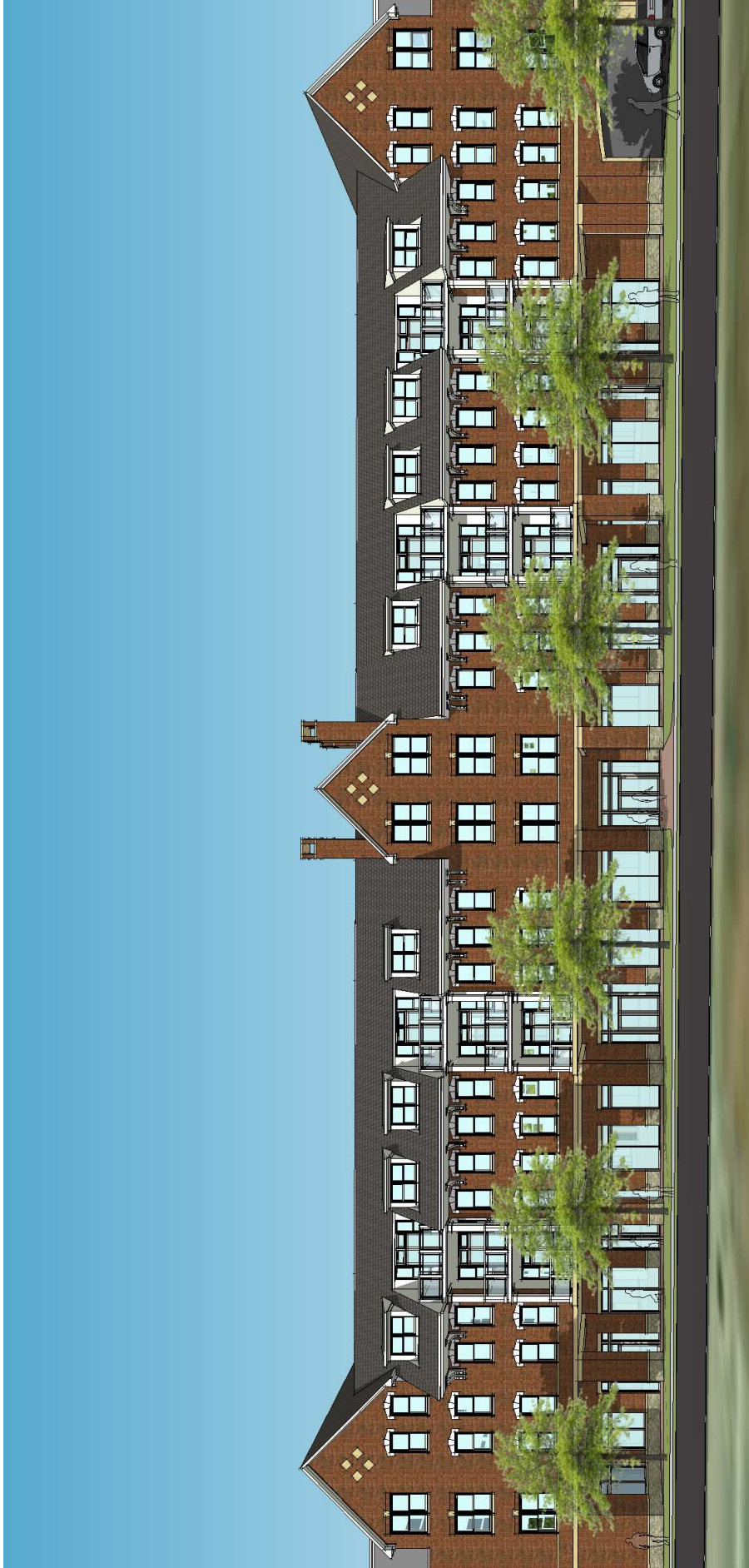
EAST ELEVATION



**27 UPTON ST APARTMENTS - CONCEPTUAL STUDY**  
 CONCEPTUAL ELEVATIONS







**27 UPTON ST APARTMENTS - CONCEPTUAL STUDY  
PERSPECTIVES**



**GRANT ARCHITECTS**





**27 UPTON ST APARTMENTS - CONCEPTUAL STUDY  
PERSPECTIVES**



**GRANT ARCHITECTS**



**27 UPTON ST APARTMENTS - CONCEPTUAL STUDY  
PERSPECTIVES**



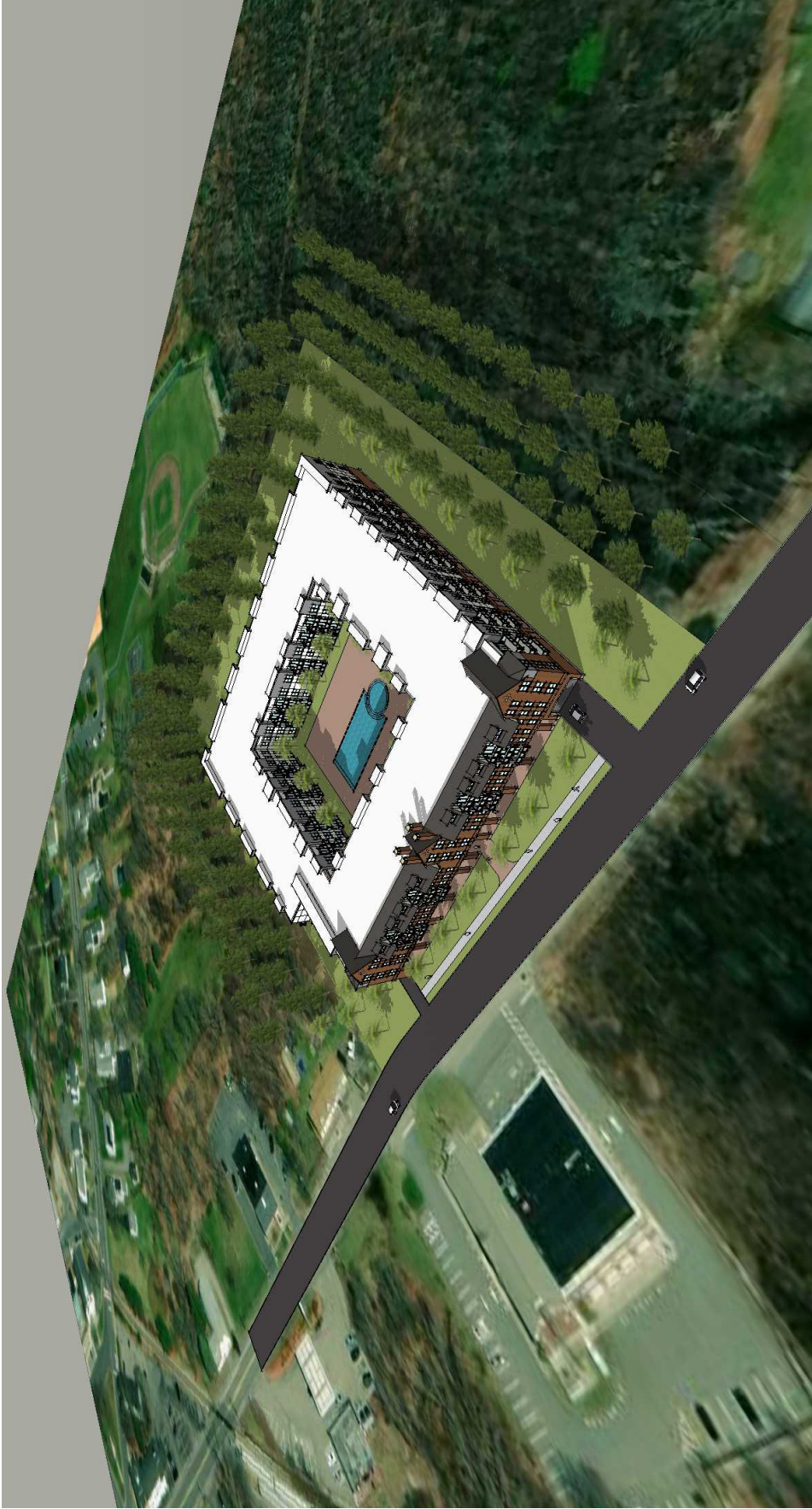


**27 UPTON ST APARTMENTS - CONCEPTUAL STUDY  
PERSPECTIVES**



**GRANT ARCHITECTS**





27 UPTON ST APARTMENTS - CONCEPTUAL STUDY  
AERIAL



GRANT ARCHITECTS



**UNIT COUNT**

GROSS BUILDING AREA	APARTMENT COUNT		TOTAL UNITS
	1 BR	2 BR	
FIRST FLOOR : 69,900	—	—	—
SECOND FLOOR : 50,942	17	23	40
THIRD FLOOR : 50,751	25	23	48
FOURTH FLOOR : 50,751	25	23	48
TOTAL AREA : 222,444	67	69	136
UNITS :	67	138	205 BEDS
BED COUNT :	INCLUDED IN FIRST FLOOR		
RETAIL SPACE : 7,630			



**A-101**

**SECOND FLOOR PLAN**  
SCALE: 1" = 40'-0" (at 11x17 sheet)



**THE GRAFTON SUITES**  
27 Upton Street, Grafton, Massachusetts

**Grant Architects**  
100 State Street, Suite 301  
Pittsborough, MA 01226

**gsxventures**

January 15, 2021

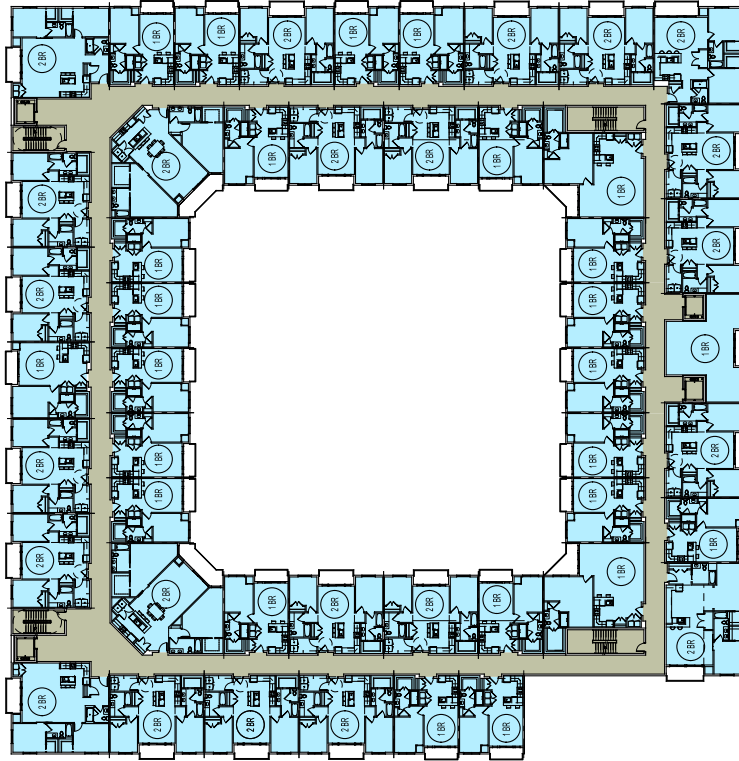


**UNIT COUNT**

	APARTMENT COUNT		
	1 BR	2 BR	TOTAL UNITS
GROSS BUILDING AREA			
FIRST FLOOR	—	—	—
SECOND FLOOR	17	23	40
THIRD FLOOR	25	23	48
FOURTH FLOOR	25	23	48
TOTAL AREA	222,424		
UNITS	67	69	<b>136</b>
BED COUNT	67	138	205 BEDS

RETAIL SPACE	7,800	INCLUDED IN FIRST FLOOR
--------------	-------	-------------------------



**A-102**

**THIRD & FOURTH FLOOR PLAN**  
SCALE: 1" = 40'-0" (for 11x17 sheet)

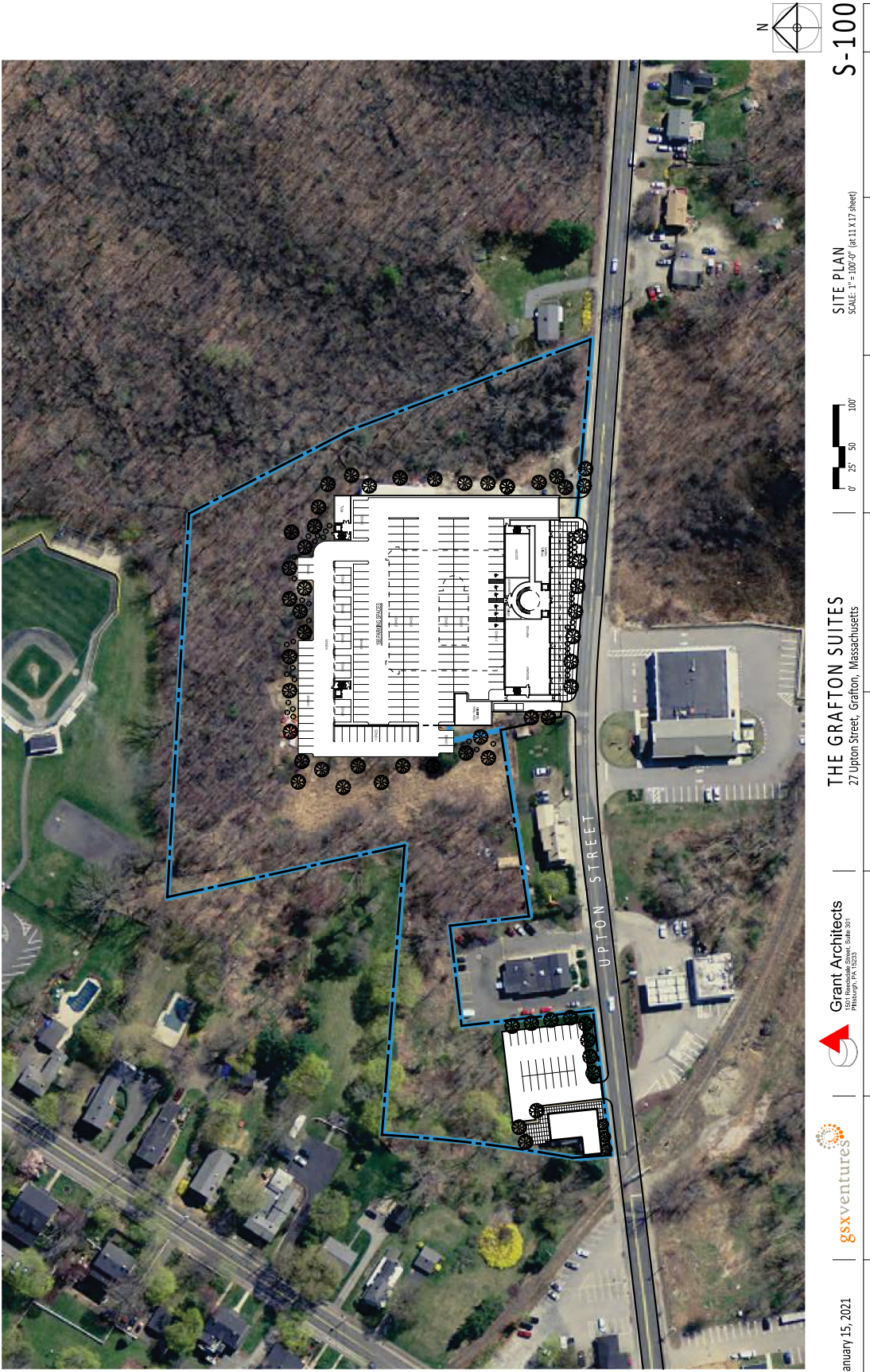


**THE GRAFTON SUITES**  
27 Upton Street, Grafton, Massachusetts

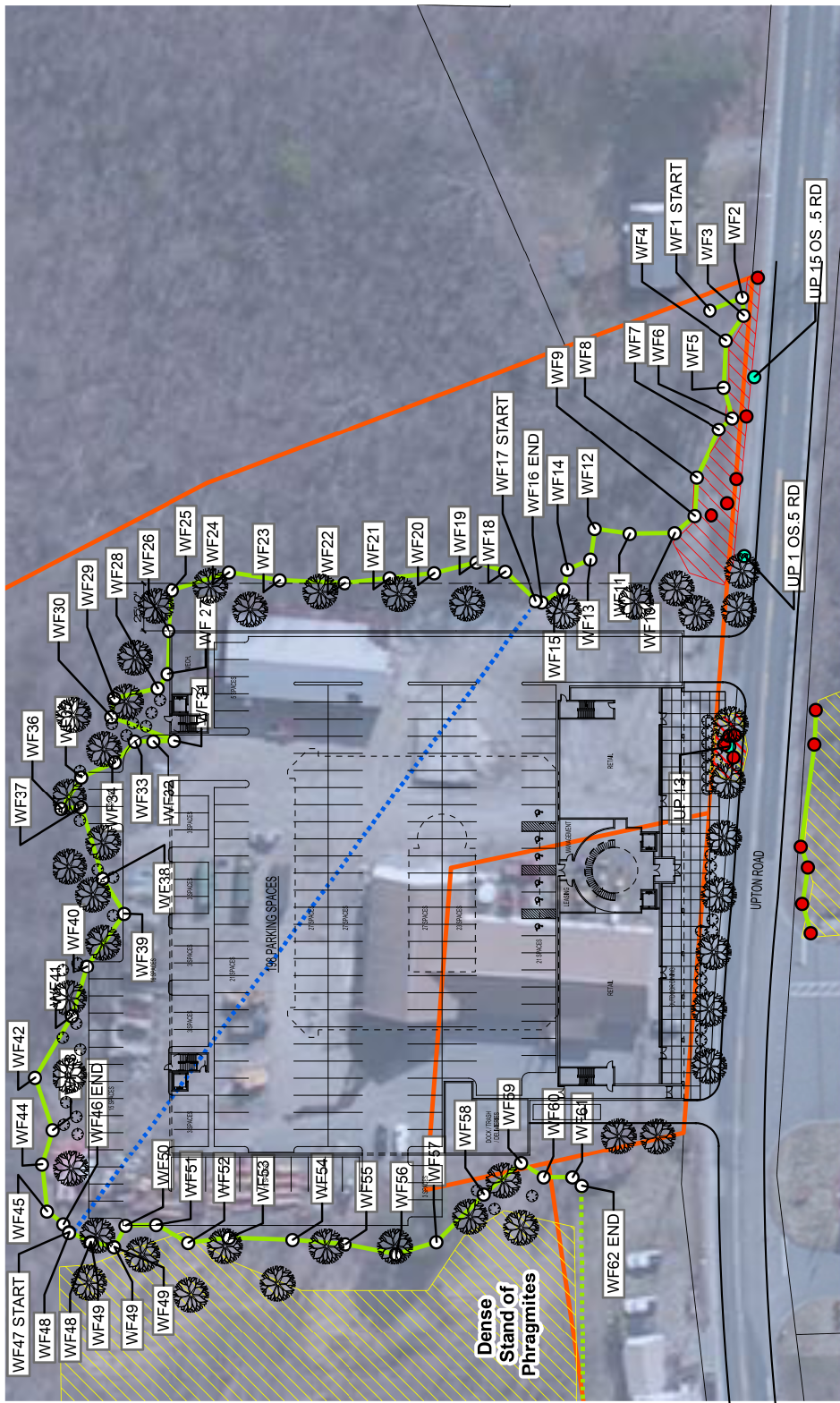
**Grant Architects**  
1041 Massachusetts Street, Suite 203  
Pittsburgh, PA 15223



January 15, 2021







WL-100

WETLANDS PLAN  
SCALE: 1" = 50'-0" (at 11 X 17 sheet)



THE GRAFTON SUITES  
27 Upton Street, Grafton, Massachusetts

Grant Architects  
1521 Massachusetts Avenue, Suite 501  
Cambridge, MA 02142



gsxventures

January 15, 2021



### A.3.(5). Description of Utility Connections



January 15, 2021

Michelle McGregor  
GSX Ventures  
1515 SE 17<sup>th</sup> Street  
Suite #460 265  
Ft. Lauderdale, FL 33346

Re: **The Grafton Suites Mixed-Use Redevelopment  
27 Upton Street, Grafton, Massachusetts**

Dear Michelle:

We understand GSX Ventures (GSX) is proposing a mixed-use retail and residential facility at the former Grafton Department of Public Works facility located at 17 and 27 Upton Street in Grafton, Massachusetts. GSX has asked Tighe & Bond to provide an evaluation of available utility infrastructure to service the proposed redevelopment. The following summarizes those findings.

Based on available orthoimagery, a sanitary sewer line runs through Upton Street and can likely provide sanitary sewer services to the proposed facility. The Grafton Wastewater Treatment Facility is located in South Grafton, approximately 3 miles south of the project site. The Grafton Sewer Department was unavailable to provide available capacity information relative to the existing sewer main. We recommend continued follow-up with the Grafton Sewer Department to confirm that adequate capacity can be provided within existing infrastructure, or if off-site improvements sanitary sewer improvements will be required.

The Grafton Water District maintains water distribution facilities within the Town of Grafton. Visual evidence indicates that a water main does exist within Upton Street. Coordination with the Grafton Water District will be required to confirm that adequate flow for both domestic and fire protection use can be obtained. The Grafton Water Department was unavailable to provide available flow and pressure capacity within existing infrastructure. We recommend continued follow-up with the Grafton Water Department to confirm that adequate flow and pressure can be provided within existing infrastructure, or if off-site water main improvements will be required.

Stormwater runoff will be managed in accordance with the Town of Grafton Stormwater Management Regulations and the Massachusetts Department of Environmental Protection Stormwater Standards. It is anticipated that stormwater quality and quantity improvements will be located on site, with potential overflow connections discharging to the wetlands or to the municipal storm drainage system as capacity allows.

We understand that private utility services (i.e. electric, tel/data) are available in Upton Street. Overhead electric, telephone and cable services will be carried to the subject parcel and will be relocated underground within the proposed development. Electric service is provided by National Grid Electric, and it appears that three-phase power is available. Tel/data service is provided by Verizon and Crown Castle.

Eversource Gas maintains natural gas service in the Town of Grafton. Based on communication with Eversource Gas, a 2-inch gas main exists in Upton Street which ends approximately at the former DPW facility. Depending on the proposed gas loan, this existing main may require an upgrade at the expense of the developer. Once the project is approved



by the Town, the developer will work with Eversource Gas to explore necessary system upgrades.

We trust this information will be satisfactory for your use in the development of The Grafton Suites project. Please do not hesitate to contact me should you have any questions at 413.572.3238 / [jchristy@tighebond.com](mailto:jchristy@tighebond.com).

Very truly yours,

**TIGHE & BOND, INC.**

  
Jean E. Christy, PE  
Senior Engineer

P:\Business Lines\Land Use & Transportation\5300\_General\_Proposals\GSX Ventures\The Grafton Suites Utility Summary.docx





#### **A4. Project Financials**

The size and scope of the project will fill important housing and retail needs of the surrounding area, helping raise the appeal of the neighboring businesses. The project will also provide the beginnings of a retail and residential anchor on Upton Street through the construction of 136 residential units, approximately 7,800 square feet of neighborhood/service retail, and expanded sidewalks and walking trails, all of which will be necessary for sustained success. Although the spillover effect of our project is difficult to project, as we noted above, the economic impact of our project is expected to be approximately

\$2,000,000 over the first two to three years of the project (inclusive of the land price, fees, and taxes during construction) and upon occupancy, will generate approximately \$4,125,000 in new tax receipts over ten years of untrended annual property taxes. Applying a 3% annual growth factor will increase the total of that period by \$603,850.

Perhaps most importantly though, **this proposal does not require any public financing**. The structuring and timing challenges that are typical of tax credit transactions are avoided, thereby significantly compressing the delivery time to market for our project in relative terms. Our preliminary financing projections, included later in this section, indicate that our use components (and square footages for each) are financially viable and will be attractive to both debt equity sources.

##### **1. Evidence of the financial status of the applicant.**

The Firm has undertaken a number of complex construction projects – many times with a brownfield redevelopment component – under difficult financing environments. As mentioned earlier, GSX Ventures has extensive experience in developing high-quality living environments in the Massachusetts area. The firm has developed luxury residential projects in Colorado, Maryland, Massachusetts, New Jersey, New York, Pennsylvania, Rhode Island, and Virginia. The principals and senior staff for the Applicant have extensive experience underwriting and sourcing financing for ground-up, mixed-use developments and anticipate it will be able to successfully arrange all requisite financing through its capital market relationships.

**An estimated project proforma indicating sources of funding including federal, state, and local funding that demonstrates the Applicant has the financial strength to carry out the proposed development**

The project will be financed through a combination of self-funded Applicant equity, real estate private investment equity, and traditional construction financing, the last of which will be later converted into (or taken out by) more permanent debt financing. As depicted below in the Sources and Uses Schedule, this project does not rely on any public funding (federal, state or local) at any stage and for any project component. The Applicant anticipates financing terms to be based on a debt-to-equity ratio of 65/35.

<b>DEVELOPMENT BUDGET</b>	
	<b>Total Cost</b>
<b>Land</b>	650,000
<b>Hard Costs</b>	
Construction Costs	24,913,455
Other Hard Costs	950,000
Owners Contingency	1,245,673
<b>Total Hard Costs</b>	<b>27,109,128</b>
<b>Soft Costs</b>	
Soft Costs	6,189,728
Developer's Fee	1,122,793
Contingency	230,685
<b>Total Soft Costs</b>	<b>7,543,206</b>
<b>Total Project Costs</b>	<b>35,302,335</b>

<b>DEAL STRUCTURE</b>	
<b>Capitalization</b>	
Debt	23,000,000
Equity	12,302,335
10% GP	1,230,233
90% LP	11,072,101
<b>Total</b>	<b>35,302,335</b>

The project pro forma begins with a closing assumption date of February 2022, with delivery of the residential units and retail component in February 2023. Based on an evaluation of comparable Class A properties, supported by a limited amount of neighborhood/service retail, the units have been underwritten at a beginning monthly average of ~\$2,131, and the retail at \$16.00/SF triple-net. These projections are based on a competitive survey of similar properties. We believe the estimates are conservative, especially given the location of the property near downtown Grafton. The luxury senior housing project is estimated to be stabilized at a 95% occupancy rate after a 14-month lease up period. Rents are trended at 2% per year.

The project team anticipates that retail and office tenants can be attracted during the construction and lease-up period. The development of retail and office and the barn renovation will occur concurrently with the development of the luxury senior housing.

## **References**

### **Gilbane Development Co.**

Ed Broderick  
Executive Vice President  
Gilbane Development Company,  
7 Jackson Walkway  
Providence, RI 02903  
401-456-5800  
ebroderick@gilbaneco.com

### **University Village, Salisbury State University**

Salisbury, Maryland  
Mr. Darin Lockwood, President  
Meridian Consulting Group  
302-684-4766  
dal@meridianengineers.com

### **Grove City College**

Grove City, Pennsylvania  
Mr. Thomas Gregg, Vice President for  
Operations  
Grove City College  
724-458-3795  
twgregg@gcc.edu

### **Amherst Apartments**

Amherst MA.  
Mr Todd Gaines  
512-369-3030  
Aspen Heights Partners  
[tgaines@ahpliving.com](mailto:tgaines@ahpliving.com)

### **North Charles Street Apartments**

Baltimore, Maryland  
Mr Harvey Blonder  
HB Properties  
Annapolis, Md.  
410-224-8720  
hbproper@hbprop.net

### **Bay Village Assisted Living Facility**

Annapolis, Md. 21403  
Mr John Degen  
Bay Village Associates  
Annapolis, Md  
410-200-8148  
jdegen@integracare.com

### **The Galleria at Loudenville A Mixed Use development**

Mr. Thomas Burke  
The Burke Companies  
Albany, New York  
518-281-7226  
[tburke270@gmail.com](mailto:tburke270@gmail.com)

Michael Oleksak  
Senior Lender and Chief Credit Officer,  
**PeoplesBank**  
330 Whitney Avenue, Holyoke, MA 01040  
Office: 413-493-8683

Michael E. Watts, President  
**The Watts Group**  
65 La Salle Road, Suite 209, West Hartford,  
CT 06107  
Office: 860-231-7250

Max Lamont  
**Montgomery Street Partners**  
Dallas, TX  
Office: 412-317-1226

Jared Ziesler  
**Capital Solutions**  
Bluebell, PA  
Office: 267-253-3858



FORM H  
TAX ATTESTATION CERTIFICATION

Pursuant to M.G.L., Ch. 62C, s. 49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Jon M. Grant

  
Name of person signing proposal

\_\_\_\_\_  
Signature of person signing proposal

27 Upton Associates, LLC  
\_\_\_\_\_  
Name of Business (please Print or Type)

171-38-7786  
Social Security Number or Federal  
Identification Number\*

Date: January 15, 2021

FORM I  
HOLD HARMLESS & INDEMNITY AGREEMENT

27 Upton Associates, LLC, a Massachusetts limited liability (hereinafter "the Company") shall indemnify and hold harmless the Town of Grafton, and its officers, employees, agents, and servants, from and against any and all claims, suits, action, legal or administrative proceedings, damages, liabilities and reasonable attorney fees, costs, and expenses arising from the act(s) or omissions(s) of the Company, or anyone acting under its direction, control or on its behalf in connection with the site visit and inspection being performed 8 Pine Street, Grafton, MA, shown on Assessor's Map 5 Parcel 5 (the Site) on \_\_\_\_\_ (date) and from \_\_\_\_\_ (hours of view). The foregoing indemnity and hold harmless agreement shall not apply to any liability caused by the acts, omissions, fault or negligence of the Town of Grafton or anyone acting under its direction, control or its behalf.

27 Upton Associates, LLC

\_\_\_\_\_  
NAME OF COMPANY

  
\_\_\_\_\_  
Signature

Dated: January 15, 2021

FORM J  
CERTIFICATION OF CORPORATE AUTHORITY

The undersigned, being the sole member of 27 Upton, LLC, a Massachusetts limited liability company (the "Company") entitled to vote on the action, hereby consent to the adoption of the following resolutions:

RESOLVED: That GSX Solutions, LLC, the Managing Member, is authorized to execute any and all contract documents and to enter into and negotiate the terms of all contracts and to accomplish same and to execute any and all documents, instruments, and agreements in order to effectuate the transaction and that said transaction shall be valid, binding, effective, and legally enforceable.

RESOLVED: That Jon M. Grant, managing member of GSX Solutions, LLV, being the sole member of the Company is, authorized, from time to time, in the name and on behalf of the Company to take or cause to be taken all such action(s) as s/he or they, as the case may be, deem necessary, appropriate or advisable which shall be conclusive evidence that the same is authorized by the Company.

RESOLVED: That Jon M. Grant is, authorized, from time to time, in the name and on behalf of this Company, under its corporate seal, if desired , to execute, make oath to, acknowledge, deliver and file any and all of the agreements, instruments, certificates and documents referred to or related to the foregoing resolutions.

RESOLVED: That Jon M Grant is authorized, from time to time and on behalf of this Company, under its corporate seal, if desired, to execute, acknowledge and deliver any and all agreements, instruments, certificates and documents referred to or related to the foregoing resolutions, with such changes as he may deem necessary or desirable, and the signature of Jon M. Grant to be conclusive evidence that the same is authorized by the members of the Company.

APPROVED BY SOLE MEMBER:

GSX Solutions, LLC

By:   
Jon M. Grant, Managing Member



FORM K  
CERTIFICATE OF FOREIGN CORPORATION

The undersigned hereby certifies that it has been duly established, organized, or chartered as a corporation under the laws of \_\_\_\_\_

(Jurisdiction)

The undersigned further certifies that it has complied with the requirements of M.G.L. c. 30, §39L and with the requirements of M.G.L. c. 181 relative to the registration and operation of foreign corporations within the Commonwealth of Massachusetts.

\_\_\_\_\_  
Name of person signing proposal

\_\_\_\_\_  
Signature of person signing proposal

\_\_\_\_\_  
Name of Business (please Print or Type)

Date: \_\_\_\_\_

**DISCLOSURE STATEMENT FOR  
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY  
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

The undersigned party to a real property transaction with a public agency hereby discloses and certifies, under pains and penalties of perjury, the following information as required by law:

C. (1) REAL PROPERTY:

(2) TYPE OF TRANSACTION, AGREEMENT, or DOCUMENT:

(3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:

The Town of Grafton, acting by and through its Select Board,  
**Grantor**

(4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY (IF NOT AN INDIVIDUAL):

(5) ROLE OF DISCLOSING PARTY (Check appropriate role):

- |  |   |
|--|---|
| <input type="checkbox"/> Lessor/Landlord | <input type="checkbox"/> Lessee/Tenant            |
| <input type="checkbox"/> Seller/Grantor  | <input checked="" type="checkbox"/> Buyer/Grantee |

Other (Please describe): \_\_\_\_\_

(6) The names and addresses of all persons and individuals who have or will have a direct or indirect beneficial interest in the real property excluding only 1) a stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation or 2) an owner of a time share that has an interest in a leasehold condominium meeting all of the conditions specified in M.G.L. c. 7C, s. 38, are hereby disclosed as follows (attach additional pages if necessary):

<u>NAME</u>	<u>RESIDENCE</u>
<i>G.S.X. Solutions, LLC</i>	<i>a Maryland limited liability company</i>
<i>Jon M. Grant</i>	<i>Fort Lauderdale FL</i>

(7) None of the above-named persons is an employee of the Division of Capital Asset Management and Maintenance or an official elected to public office in the Commonwealth of Massachusetts, except as listed below (insert "none" if none):

(8) The individual signing this statement on behalf of the above-named party acknowledges that he/she has read the following provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts:

Town of Grafton

Form "L" - Grafton RFP 27 Upton Street

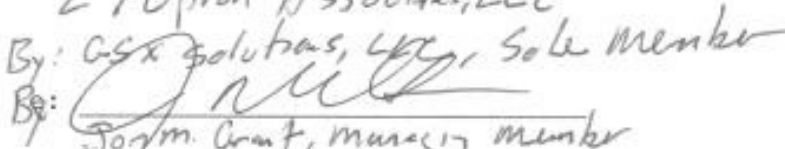
**DISCLOSURE STATEMENT FOR  
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY  
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

*No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the Securities and Exchange Commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and timeshares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arm's length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.*

*Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify the state ethics commission of such names, and shall make copies of any and all disclosure statements received available to the state ethics commission upon request.*

*The commissioner shall keep a copy of each disclosure statement received available for public inspection during regular business hours.*

(9) This Disclosure Statement is hereby signed under penalties of perjury.

27 Upton Associates, LLC  
By: GSA Solutions, LLC, Sole Member  
Sign:   
By: Joseph Grant, managing member  
Dated: 1/15/21





The Cost Proposal for the submission has been provided in a separate sealed envelope as requested in the Request For Proposal guidelines.



