

September 26, 2024

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

RE: 5 Canton Road, Kearns School RFP

Dear Ms. Kenyon:

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

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

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

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

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

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

Sincerely,

Kelly McDermott

Kelly McDermott
President & CEO



Mission Statement

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

Background and Experience

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

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

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

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

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

New Samaritan Development Corp.

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

NSC and NSDC provide Technical Assistance activities including the following:

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

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

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



BACKGROUND AND EXPERIENCE

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

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

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

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

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

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

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

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

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

REGULATORY COMPLIANCE

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

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

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

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

inspections, vacant unit preparation and comprehensive maintenance programs.

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

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

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

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

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

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

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

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

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

CORPORATE OFFICE SERVICES

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

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

- Resident Accounts
- Monthly maintenance report

FISCAL COMPLIANCE

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

PHYSICAL OPERATIONS

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

problems.

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

TRAINING

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

Completed projects of
New Samaritan Corporation

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

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

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

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

BONNEY BROOK, Cornwall Bridge, CT

Opened 2014

10 units of HUD 202 housing for low income elders

NEW SAMARITAN PARKVILLE, Hartford, CT

Opened June 2024

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

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

Officers/Directors:

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

Directors:

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

KEY EMPLOYEES

President and Chief Executive Officer

Kelly McDermott

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

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

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

First Employed with NSC/EHM: 2023

Chief Operating Officer

Sophia Rosa

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

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

First Employed with NSC/EHM: 2023

Comptroller / Director of Finance

Sabine E. Cox

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

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

First Employed with NSC/EHM: 1988



5 Canton Road: Affordable Housing Proposal

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

PROJECT VISION

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

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

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

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

DEVELOPMENT COSTS AND TIMELINE

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

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

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

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

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

REFERENCES

Naren Dhamodharan

President

Hampden Park Capital & Consulting

413.636.9616

Paul H. Selnau, AIA, SPHC ©

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

Susan Piacentini
Field Office Director, HUD CT Office
860.240.9702