#### TOWN SENIOR/DISABLED TAX RELIEF PROGRAM FOR FISCAL YEAR 2020

### ASSESSOR'S REPORT TO THE RTM PER Chapter 95, Article III, Section 15.1

	FY 2	021	101	NE, 2019		FY :	2020		CHANGE FY20	0 to FY21	
	# of Accounts	Amount			1	# of Account:	s <u>Amount</u>	· <u> </u>	# of Accounts	Amount	% Change
SENIOR/DISABLED TAX RELIEF PROGRAM											
Credit Program (non-reimbursable, no lien)		\$3,311,346				1306	\$3,300,036		-5	\$ 11,310	0.34%
Freeze Program (non-reimbursable, no lien)		\$0				0	\$0		0	\$ -	#DIV/0!
Deferral Program (reimbursable, lien)	5	\$22,964				5	\$22,964		0	\$ -	0.00%
Summary - total number of accounts and total tax loss	1306	\$3,334,310				1311	\$3,323,000		-5	\$11,310	0.34%
SCHEDULE OF APPLICATION ACTIVITY											
<u> </u>	Credit	Freeze	Deferral	Totals							
Total accounts-previous fiscal year	1306	0	5	1311		1343			-32		-2.44%
New applications received		0	0	235		157			78		33.19%
Total added		0	0	235	7	157			78		33.19%
Disallowed (Excess Income)	-58	0	0	-58	_	-53			5		-8.62%
Disallowed (Excess Assets)		0	0	-27		-14			13		-48.15%
Removed (deceased)		0	0	-71		-47			24		-33.80%
Removed (sold)		0	0	-71 -47		-37			10		
·		0	0	-4 <i>7</i> -5		-3 <i>7</i>					-21.28%
Removed (Not Living in Home)		-	ŭ						2		-40.00%
Removed (failed to refile)		0	0	-29		-35			-6		20.69%
Disallowed (Other)	-3	0	0	-3	7	0			3		-100.00%
Total Removed	-240	0	0	-240		-189			51		-21.25%
Net Change	-5	0	0	-5		-32					
Summary - total number of accounts	1301	0	5	1306		1311			-10		0.77%
	0										
SCHEDULE OF INCOME RANGES											
		Credit				abled			Deferral		
	Married	Single	Totals		Married	Single	_	Married	Single	Grand Total	
\$0-\$18,600		108	120		0	12		0	0	132	
\$18,600-\$26,500		174	192		2	6		0	1	201	
\$26,501-\$32,700		148	177		3	6		0	1	187	
\$32,701-\$39,000	30	125	155		2	6		0	0	163	
\$39,001-\$48,000	63	125	188		4	3		0	0	195	
\$48,001-\$56,000	63	82	145		3	0		0	0	148	
\$56,001 -\$77,300	131	137	268		7	2		1	2	280	
\$73,501-\$84,000		<u>0</u>	<u>0</u>		<u>0</u>	<u>0</u>		<u>0</u>	<u>0</u>	0	
Totals	346	899	1245		21	35		1	4	1306	
	340	- 033	12-13			1301			<del>-</del>	1300	
SCHEDULE OF ASSESSMENT RANGES (Quartiles)											
Assessment Range	# of Accounts	9	% of Total Accts.			SCHEDULE	OF AGE RANG	ES FY 2020			
\$0-\$216,053	327		25.04%			<65	5 31	2.37% Di	isabled or Surviving Spouse(1)		
\$216,054-271,565	326		24.96%			65-74	4 389	29.79%			
\$271,566-328,415			24.96%			75-84		33.69%			
			25.04%			85-94		29.48%			
						-55					
\$328,416-1,363,950 Over \$1,363,950			0.00%			>95	5 61	4.67%			
\$328,416-1,363,950			0.00%			>95	5 61 1306	4.67%			

#### AVERAGE TAX RELIEF RECIPIENT ASSESSMENT

Average Tax Relief Recipient Assessment-FY 2021	\$284,071
Average Tax Relief Recipient Assessment-FY 2020	\$291,575

NOTES

#### TOWN TAX RELIEF-5 YEAR HISTORY

	F	Y 2021	FY	2020	FY 2	019	FY	2018	FY	2017
	# of Apps	TAX LOSS	# of Apps	TAX LOSS	# of Apps	TAX LOSS	# of Apps	TAX LOSS	# of Apps	TAX LOSS
TOTAL CREDIT APPS	13	01 3,311,34	1306	3,300,036	1336	3,381,880	1428	\$3,598,903	1462	\$3,667,929
TOTAL FREEZE APPS		0 -	(	-	0	-	0	\$0	4	\$12,544
TOTAL DEFERRAL APPS		5 22,96	1 5	22,964	. 7	29,819	10	\$39,099	9	\$32,080
TOTALS	13	06 3,334,31	1311	3,323,000	1343	3,411,700	1438	\$3,638,002	1475	\$3,712,553
TOTAL \$ CHANGE FROM PRIOR YEAR	\$11,3	10	-\$88,700	)	-\$226,302		-\$74,551		-\$136,822	
TOTAL % CHANGE FROM PRIOR YEAR (\$)	0.3	1%	-2.60%	5	-6.22%		-2.01%		-3.55%	
TOTAL CREDIT APP# NET CHG FROM PRIOR YEAR		-5	-5	;	-92		-34		-63	
TOTAL FREEZE APP# NET CHG FROM PRIOR YEAR		0	(	)	0		-4		-1	
TOTAL DEFERRAL APP# NET CHG FROM PRIOR YR		0	(	)	-3		1		-3	
NEW APPLICATIONS RECEIVED DISALLOWED (OVER INCOME, ALL PROGRAMS) REMOVED (SOLD, DECEASED, MOVED, NON-RESIDENT) REMOVED (FAILED TO REFILE, NON-CT RESIDENTS, OVER ASSET CAP, DQ TAX, INCOMPLETE)	1	35 58 23 59	157 53 85 49 187	<b>;</b>	94 53 120 16		115 17 97 38		119 23 123 40	
		iL 2019		2018	GL 2			2016		2015
State Credit Program		Y 2021		2020 Tot Benefit	FY 2 # of Apps			2018 Tot Benefit		2017 Tot Benefit
NUMBER OF PARTICIPANTS/TOTAL BENEFIT INITIAL (M35B)	# of Apps	Tot Benefit 36 \$ 361,951.6	# of Apps	\$ \$ 358,510.54		Tot Benefit \$ 374,397.86	# of Apps	5 \$ 414,037.80	# of Apps	\$ 430,622.46
NUMBER OF PARTICIPANTS/TOTAL BENEFIT HINTIAL (M35P)		20 \$ (6,208.7		\$ \$ 338,310.34 \$ \$ (4,083.25		\$ (2,916.25)		4 \$ (2,395.25		2 \$ (2,852.50)
NET		38 \$ 358.510.5	•		•	\$ 371,481.61		1 \$ 411,642.55		2 \$ 427,769.96
TOTAL CHANGE FROM PRIOR YEAR		16 -4,083.2				-40,160.94				
TOTAL % CHANGE FROM PRIOR YEAR (\$)	-2.4	,		-,		-9.76%		-,		,
	2	.,.	0.027	2.037		3.707	237	3,	. 0.517	7.0570
STATE REIMBURSEMENT		\$ -		\$ -		\$ -		\$ -		\$ 380,723.00
NET COST		\$ 358,510.5	1	\$ 358,510.54		\$ 374,397.86		\$ 414,037.80		\$ 49,899.46
% REIMBURSED		0.0	%	0.0%	6	0.0%		0.0%	6	88.4%

**Historic District Commission:** The Historic District Commission shall consist of five members, no more than three of whom shall be registered with the same political party and three alternate members, no more than two of whom shall be registered with the same political party. Terms are five years with a two-term limit. Members are appointed by the Board of Selectmen and subject to RTM approval.

Seat	Name	Position	Party	Term Start	Term End
1	Negron, Rosina C.	Clerk	U	11/17	11/22
2	Gravanis, Arthur N.		R	11/18	11/23
3	Klyver, Adam J.	Chair	R	11/19	11/24
4	Kufferman, Margaret Browning		U	11/15	11/20
5	Shea, Christopher	Vice-Chair	R	11/16	11/21
ALT1	Bohan, James P.		R	11/18	11/23
ALT2	[VACANT]			11/19	11/24
ALT3	Clark, George E.		R	11/16	11/21

Full		Alternate		
Party	Count	Party	Count	
Republicans	3	Vacant	1	
Unaffiliated	2	Republicans	2	
Total Full	5	Total ALT	3	

The Historic District Commission discusses and votes on alterations to properties that are within the town's three historic districts in Greenfield Hill, Southport, and the Old Post Road by downtown Fairfield. The Historic District Commission shall have the powers and duties conferred upon historic district commissions and historic properties commissions generally by Chapter 97a of the General Statutes (C.G.S. § 7-147a et seq.).

Duties include approving nearly any change to a property that is within a historic district if that change is visible from a public street (assuming that natural barriers such as shrubs and trees are not in place, since they can be removed) and studying and making recommendations to the RTM to establish additional historic properties from time to time as it sees fit. Only properties authorized in writing by the owner of record shall be recommended by the commission as designated by the RTM as historic properties.



# Town of Fairfield

Office of the First Selectwoman 725 Old Post Road Fairfield, CT 06824

### **BOARDS AND COMMISSIONS QUESTIONNAIRE**

To be considered for appointment to a Board or Commission, please fill out this form, save a copy and email the saved copy, along with a copy of your resume, to the First Selectwoman's Office at <a href="mailto:jcarpenter@fairfieldct.org">jcarpenter@fairfieldct.org</a>. Please note that your resume and completed questionnaire are public documents. If you have any questions, please contact Jennifer Carpenter in the First Selectwoman's Office at 203-256-3095 or <a href="mailto:jcarpenter@fairfieldct.org">jcarpenter@fairfieldct.org</a>.

Board/Commission: Historic District Commission

Date: July 14, 2020

Party Affiliation: Unaffiliated

Name: **Dr. Daryn Reyman-Lock** email: daryn.reyman@gmail.com

Address: 515 Stillson Road, Fairfield, CT 06824 home phone: 203-524-5289

work phone: **as above** cell phone: **as above** 

1. How did you learn about this position?

I reached out to Adam Klyver when I first moved to Fairfield to see if I could be of use to the HDC, although I didn't necessarily realize that they did not have a full board.

2. Why are you interested in serving and how can you contribute to this board/commission?

I have a Ph.D. in archaeology and almost 15 years of international preservation experience. I own my own Historic Preservation consulting business which involves writing National and State Register Nominations, deal with Sustainable Connecticut and writing sustainability documentation, Historic Resource Inventories and State Tax Credit Applications. Likewise I curate exhibits and write didactic panels for Norwalk historical resources including Mill Hill and the Lockwood-Mathews Mansion, and run the historic house plaque program for Norwalk, New Canaan and Weston. I am currently in the process of writing the state register nomination for my own home and am about to finish 1.75 years as the Town of Westport's Historic Preservation Specialist in which I fulfil a number of obligations including advising other town departments on historic resources and requirements and overseeing the HDC, safe guarding Historic resources, demolitions and working with the public on maintaining and protecting cultural resources.

- 3. Have you attended any meetings or reviewed past minutes/agendas? If yes, please specify. **No.**
- 4. Have you spoken with the chair, any members, or the appropriate Department Head? Yes, I met with Adam Klyver back in the earlier part of this year.
- 5. Have you read the written description of the board's role?

Yes. I am very familiar with HDC procedure and process as well as what their jurisdiction is and is not.

6. Do you have any potential conflict of interest?

I have my own consulting firm and have one or two projects (including my own house) in Fairfield. Should any of those projects need to come before the HDC, I would recuse myself, although none of them fall under HDC jurisdiction.

7. Do you know the time, date and location of meetings and will you be able to attend and fulfill the obligations of the position?

Yes, I do, but as far as I am aware, I am being considered for an alternate position and will not have the same responsibilities as a full member of the HDC unless seated for an agenda item or a full meeting.

8. Participation requires that you are registered voter in the town of Fairfield. Additionally, the Town Charter requires that party balance be maintained on all boards/commissions. Are you registered to vote and what is your party affiliation?

I am a registered, unaffiliated voter.

9. Please use this space to ask any questions you may have or to provide additional information you'd like to share.

None at the moment!

### DARYN REYMAN-LOCK, PH.D.

(203) 524 - 5289

daryn.reyman@gmail.com

515 Stillson Road Fairfield, CT 06824

#### **SUMMARY**

Architectural historian and archaeologist specializing in historic research involving land records, written and oral histories for certification for State and National historic preservation efforts, preparing National and State register nominations and grant writing. Experience includes research, collection curation and management, site identification, mapping, excavation and community outreach to local historical societies and public schools.

#### **EDUCATION**

• Ph.D., Archaeology, University of Nottingham, United Kingdom
Dissertation: *Identity through Architecture: The Cities of Gallia Narbonensis*, 50 B.C. – A.D. 275

• M.A., Roman Archaeology, University of Nottingham, United Kingdom

Thesis: *Cultural Contact in Southern Mediterranean France*, 7<sup>th</sup> to – 2<sup>nd</sup> Century B.C.

• B.S., Geological Sciences, Lehigh University 2005

• B.A., Anthropology with a concentration in Archaeology, Lehigh University 2005

### **QUALIFICATIONS**

• Meets National Park Service Standards 36CFR61, Appendix A for:

Architectural Historian Historian Historic Preservationist

Listed as an Architectural Historian by the Connecticut SHPO

#### HISTORIC RESEARCH AND MUSEUM EXPERIENCE

- Historic Preservation Specialist, Westport, CT.
   Services provided: Liaising with public, HDC and various Town departments. Research of historic resources, grant writing and advising the HDC on historic properties and various preservation issues. Assessing properties, writing National and State Register nominations as well as Local Historic Property and Local Historic District Study Reports.
- Historic Preservation Specialist.
   Services provided: historical building research for various grant applications including National and State
  Historic Register Nominations as well as historic plaque programs; grant writing; genealogical and historic
  research; project management of conservation and restoration work; re-interpretation and curation of historic
  buildings, museums and landmarks including parks and cemeteries; collections management.
- Historic Building Researcher.

Services provided: historical house, building and land research for Connecticut plaque programs for the Norwalk and New Canaan Historical Societies and the Stamford Historic Neighborhood Preservation Program.

- Curatorial Assistant and Registrar, Greenwich Historical Society, Greenwich, CT.
   2013 2018
   Curatorial assistant (collections management, accessioning of archival material, conservation, exhibition research and installation); registrar for the exhibit *An American Odyssey: The Jewish Experience in Greenwich*, November 2017 April 2018.
- Nottingham City Council and Trent and Peak Archaeological Unit, Nottingham, UK. 2012 2013 Archaeologist
- Assistant to the Curator and Archivist, Greenwich Historical Society, Greenwich, CT. 2004 Exhibition design and installation team member, collections management and conservation.

#### TEACHING APPOINTMENTS AND COURSES TAUGHT

•	University of New Haven, Adjunct Professor of History Foundations of the Western World Scum of the Earth: Roman Society	2014 – Present 2017
•	Sacred Heart University, Adjunct Professor of History	
	Western Civilization I: Ancient to 1500 AD	2016 - 2017
	The Human Journey: Historical Paths to Civilization	2013 – 2014
•	Southern Connecticut State University, Adjunct Professor of History and Anthropology	
	Western Civilization I	2013
	Interpreting Cultures	2013
•	University of Nottingham (UK), Teaching Assistant	
	Introduction to the Archaeology of the Roman Empire, Final Essay Evaluator	2009 - 2010
	Britain in the Western Roman Empire, Undergraduate Seminars	2009
	Hadrian's Wall First-Year Undergraduate Trip, Graduate Assistant	2007 - 2008

#### PAPERS DELIVERED

• Pushing Boundaries: Regionality in the Frontier Zones of the Roman Provinces (Session co-organizer), "Internalizing the frontier: The triumphal architecture of Gallia Narbonensis," Archaeological Institute of America Annual Meeting, January 2-5, 2014, Chicago, IL

#### SESSIONS, CONFERENCES AND WORKSHOPS

- Remembering Our Past... Saving It for Our Future: The Revitalization of Mill Hill Historic Park, New England Museum Association Annual Conference, November 7-9, 2018, Stamford, CT
- Pushing Boundaries: Regionality in the Frontier Zones of the Roman Provinces (Session co-organizer), Archaeological Institute of America Annual Meeting, January 2-5, 2014, Chicago, IL

#### **PUBLICATIONS**

- Reyman-Lock, D.K.S. "Internalizing the Frontier: The Triumphal Architecture of Gallia Narbonensis." *Environment, Space and Place* 6(2), 31-68, 2014.
- Reyman, D.K.S. *Culture Contact in Southern Mediterranean France:* 7<sup>th</sup> to 2<sup>nd</sup> Century B.C. BAR International series 2076. Oxford, 2010
- Reyman, D.K.S. "Review: Olmec Archaeology and early Mesoamerica by Christopher Pool." Cambridge Archaeological Review 23.2, 235-237, 2008
- Regalla, C.R., Reyman, D.K.S., Anastasio, D.J., Pazzaglia, F.J. 2006. Bedrock and Surficial Geologic Map of the Red Rock 7.5' Quadrangle, Beaverhead County, Southwestern Montana, Montana Bureau of Mines and Geology Open File Report 533, scale 1:24,000, 21p., 2006

**Solid Waste and Recycling Commission:** 7 Regular Members, 4-year terms with a two-term limit. Appointed by Board of Selectmen, subject to RTM approval. The Department Director serves as an Ex-Officio without vote.

The Solid Waste and Recycling Commission shall direct and supervise the activities of the Solid Waste and Recycling Department implementing state and local mandated programs for the collection, disposal and recycling of garbage and other refuse. Policymaking responsibilities or general management supervision is also suggested.

The purpose of the Solid Waste and Recycling Commission is to prepare a Solid Waste and Recycling Plan and it shall amend said plan from time to time as required by provision of the Connecticut General Statutes. It shall review and recommend to the Representative Town Meeting proposals for local and regional solid waste and recycling. It may propose ordinances for adoption by the RTM and may adopt regulations for the disposal of solid waste and recycling of recyclable materials. Such regulations shall be adopted in accordance with the requirements of the Charter of the Town of Fairfield and, if applicable, the General Statutes of the State of Connecticut. It shall review and recommend to the Board of Selectmen, Board of Finance and to the RTM an annual budget for operations of the Solid Waste and Recycling Department.

Seat	Name	Position	Party	Term Start	Term End
1	Becker, Andrew C.		R	11/16	11/20
2	MacDonald, Charles P.	Chair	U	11/16	11/20
3	Dolan, Hugh F.	Vice-Chair	R	11/16	11/20
4	Beyer, Mary S.	Secretary	D	11/18	11/22
5	Vacant			11/18	11/22
6	Gleysteen, Guy		U	11/18	11/22
7	Pagnozzi, Joseph R.		R	11/19	11/23

Full	
Party	Count
Vacant	1
Democrats	1
Republicans	3
Unaffiliated	2
Total Full	7

### PROFESSIONAL SERVICE

- Fairfield County Preservation Alliance Steering Committee, Board Member
   Norwalk Preservation Trust, Board Member
   Roman Provinces Interest Group Member, AIA
   Advanced Archaeology Journal, Editorial Assistant
   2020 Present
   2015 2019
   Advanced Archaeology Journal, Editorial Assistant
- Environment, Space and Place Journal, Peer Reviewer

### 2014

### **CONTINUING EDUCATION**

• American Architectural History, Boston Architectural College

Spring 2020

#### **COMMUNITY OUTREACH**

- What do I do as an archaeologist? East Shore Middle School, Milford, Connecticut, Presentations to 6th Graders about being an archaeologist, 2017
- Ancient Rome in a Day East Shore Middle School, Milford, Connecticut, Presentation to 7<sup>th</sup> Graders about Ancient Rome, 2016
- Archaeology East Shore Middle School, Milford, Connecticut, Presentation to 7<sup>th</sup> Graders about archaeology, 2015
- Archaeology Instructor. Boy Scouts of America, Stratford Troop 177. Instructing scouts in order to earn an archaeology merit badge, 2014
- What do I do as an archaeologist? Western Middle School, Greenwich, Connecticut, Presentations to 7th Graders about being an archaeologist, 2012
- Tours of Markeaton Hall excavations, Markeaton Park, Derby, UK. Trent and Peak Archaeology excavation team member, public presentations about the site and aided in community excavations, Summer 2012



## Town of Fairfield

Office of the First Selectman 725 Old Post Road Fairfield, CT 06824

### **BOARDS AND COMMISSIONS QUESTIONNAIRE**

To be considered for appointment to a Board or Commission please fill out this form, save a copy and email the saved copy, along with a copy of your resume, to the First Selectman's office at <a href="mailto:firstselectmanffld@town.fairfield.ct.us">firstselectmanffld@town.fairfield.ct.us</a>. Please note that your resume and completed questionnaire are public documents. If you have any questions please contact the First Selectman's Office at 203-256-3030 or <a href="mailto:firstselectmanffld@town.fairfield.ct.us">firstselectmanffld@town.fairfield.ct.us</a>.

Board/Commission: Solid Waste and Recycling Commission

Date: July 20, 2020

Name: Timothy Bezler email: timbezler@att.net

Address: 178 Glengarry Road home phone:

Fairfield, CT 06825 Home Office phone: 203.373.9261

Party: Democratic cell phone: 203.731.4318

1. How did you learn about this position? **Democratic Town Committee** 

- 2. Why are you interested in serving and how can you contribute to this board / commission? I'm an engineer and could contribute technical knowledge, and I'm a committed environmentalist.
- 3. Have you attended any meetings or reviewed past minutes / agendas? If yes, please specify. No
- 4. Have you spoken with the chair, any members, or the appropriate Department Head? No
- 5. Have you read the written description of the board's role? **Yes**
- 6. Do you have any potential conflict of interest? I don't believe so, but see my response to question 9 for more information.
- 7. Do you know the time, date and location of meetings and will you be able to attend and fulfill the obligations of the position? **Yes**

- **8.** Participation requires that you are registered voter in the town of Fairfield. Additionally, the town charter requires that party balance be maintained on all boards/commissions. Are you registered to vote and what is your party affiliation? **Yes, I'm registered as a Democrat.**
- 9. Please use this space to ask any questions you may have or to provide additional information you'd like to share.

I have a BS Chemical Engineering degree from Penn State University, and since 1988 I have worked in my home office as a manufacturers' representative. I'm self-employed and practice technical sales of mechanical equipment used in municipal water and wastewater treatment plants in southern New England, including Fairfield. My first choice of committees would be the WPCA, but I would have a conflict of interest with WPCA, as I have equipment in the Fairfield wastewater treatment plant, I know the treatment plant superintendent, and I work with both Tighe & Bond and Wright Pierce consulting engineers. None of the companies I represent are involved with solid waste or recycling, with the possible exception of BDP Industries, who manufacture the composting turning machine located in the composting building on the grounds of the treatment plant.

## Timothy W. Bezler

178 Glengarry Road, Fairfield, CT 06825 Cell: 203-731-4318 timbezler@att.net

### Personal Profile:

Since 1988, Tim Bezler has been an Associate of David F. Sullivan & Associates, a leading New England manufacturers' representative firm, specializing in mechanical process equipment used in municipal water and wastewater treatment plants. Examples of these products are sedimentation (clarifier) equipment, mechanical bar screens, sewage pumps, aeration blowers & diffusers, and sludge dewatering equipment.

Tim is self-employed and functions as a technical sales engineer, based in his home office in Fairfield, CT. The essence of the job is to assist consulting engineers with choosing equipment and writing specifications for design of new treatment plants and upgrades of existing plants. Tim also works directly with owners who are purchasing new or replacement equipment and with contractors who install equipment. Income is strictly sales commission on equipment sold to general contractors or purchased directly by cities and towns.

Tim has a Chemical Engineering degree from Penn State (1970) and began his career in wastewater treatment in 1980 with Dorr-Oliver, a major WWTP equipment manufacturer, formerly located in Stamford, CT. During the 1970s, Tim worked in sales, marketing, and product management for Stauffer Chemical Company, formerly of Westport CT. Tim owned a home in Newtown, CT prior to moving to Fairfield in 2001.

Tim met his life partner, Laura OBrien, during a bicycle ride in 1998. Tim & Laura spend their free time enjoying the outdoors by cycling, hiking, snowshoeing, and kayaking, locally and on vacations in and around National Parks and other beautiful places. They are both avid readers of both novels and non-fiction, and they enjoy spending time with Tim's son and his family, who live in West Hartford.

#### **State of Connecticut**

Office of Policy and Management <a href="www.portal.ct.gov/opm">www.portal.ct.gov/opm</a>
STEAP Project Application, Analysis & Eligibility

Pursuant to Connecticut General Statutes Section 4-669

### **APPLICATION FOR FY 2020 STEAP GRANT FUNDING**

Towns may submit one (1) STEAP application for one (1) project, with a maximum request of \$128,205. Complete instructions are outlined on pages 16 through 19 of this application.

You must save your completed application then attach your completed application along with all other required attachments to an email and send to:

opm.steapapplications@ct.gov

### --- IMPORTANT ---

DO NOT ENTER "SEE ATTACHED" IN SECTIONS THAT ASK FOR DETAILS.

PLEASE PROVIDE THE REQUESTED INFORMATION ON THE ACTUAL APPLICATION UNLESS A

SECTION SUGGESTS USING A SEPARATE PAGE OR ATTACHMENT.

Applicant Town: Fairfield Tax ID (FEIN) No.: 066001998

Authorized Signatory Full Legal Name: Brenda L. Kupchick

Authorized Signatory Title: First Selectwoman

Authorized Signatory Email: Bkupchick@fairfieldct.org

Authorized Signatory Phone Number: 203-256-3030 Extension:

Town Office Street Address / PO Box: 725 Old Post Road, Fairfield CT Town Office Zip Code:

06824

Project Name/Title: Fairfield Center Pedestrian Improvements

Proposed Project Street Address: (near 1080) Post Road, Fairfield CT Zip Code: 06824

If no project address is available, please provide street intersection detail. Old Post Road/ Unquowa Rd and Post Rd intersection is core of project, extending in N,E,W,S directions.

Provide a list of all parcel numbers impacted by the project: None- Town/State Right of Way Some encroachment onto Town of Fairfield (Library property). Map 180 Parcel 5

The 2020 round of STEAP grants will be funded from an aggregate amount of \$15,000,000. Individual grant award amounts will depend on the number of participating towns, and the number of qualified applications selected to receive an award. **Requested amount of STEAP Funding (\$128,205 max.):** \$ 128,205

Will this project offer a benefit to your community related to the COVID-19 Public Health and Civil Preparedness emergencies? Check one: YES / x NO

If you answered YES above, please provide a brief explanation of how this project will benefit the community as it relates to the COVID-19 Public Health and Civil Preparedness emergencies:

Name, phone and email address of person preparing this application:

William Hurley P. E. Fairfield Engineering Manager 725 Old Post Road, Fairfield CT 06824 Whurley@fairfieldct.org

Identify town officials and professionals that may be contacted with questions regarding this application:

Names, phone numbers and email addresses:

William Hurley, 203-256-3015, whurley@fairfieldct.org
Mark Barnhart, 203-256-3120 mbarnhart@fairfieldct.org
Brian Carey, 203-256-3171 bcarey@fairfieldct.org
Jackie Bartolone, 203-256-3060, jbartolone@fairfieldct.org

1.) Provide a description of the proposed project which includes the purpose of the project. Please be clear as to whether the funds you are requesting are for design, planning, site acquisition and/or construction. Please be as <u>comprehensive</u> as possible in the description of this project (\*Note: only capital projects will be considered: new construction, expansion, renovation, or replacement project for an existing facility or facilities. Project costs can include

the cost of land, design, engineering, architectural planning, and contract services needed to complete the project. For a description of expenditures that **cannot** be funded with STEAP funds, see page 4).

Fairfield Center Pedestrian Improvements Project consists of the renovation and replacement of an almost 40 year old streetscape that will consist of reconstructing existing concrete sidewalks along Post Road and asphalt sidewalks along Old Post Road, replacing brick pavers were damaged or popped up and constructing new ADA Handicap Ramps where needed along the Post Road. Replacing amenities such as benches, signs, street trees or concrete curb where necessary. The Fairfield Engineering Department will design the project plans and apply/assist for permits.

2.) How will this project impact and benefit the community? Please include any projected economic impact and job creation or retention estimates.

This project will have a positive impact on pedestrians, businesses and the general community by replacing old, outdated, and damaged brick pavers/sidewalk. Some sidewalks and paver joints and sections are uneven due to tree roots, vehicular traffic or utility repair work. New construction will reduce pedestrian hazards and give the center business district an aesthetic improvement encouraging recreational and consumer activity. Project will employ about 5-10 people for 2-4 months for the construction of the project.

3.) What, if any, planning or design work has begun or been completed on this project?

The Town of Fairfield Engineering Department, DPW and Housing/ Economic Development Director began planning for this project about 6-8 months ago. The Conceptual/preliminary Plans are complete and detailed plans/ specifications (designed by Fairfield Engineering Dept.) will take 1-2 of months after grant award notification. No construction has begun on the project.

- 4.) Is the proposed project consistent with the <u>State Plan of Conservation and Development?</u>
  YES or NO **Yes**
- 5.) Is the proposed project consistent with your local Conservation & Development (C&D) Plan? YES or NO

Yes

- 6.) Last date local C&D Plan Adopted: 11/15/2016 (mm/dd/yyyy)
- 7.) Will the project require the conversion of lands currently in agricultural use to non-agricultural use?

YES or NO No

8.) Does the project area contain prime or important agricultural soils that are greater than 25 acres in area?

YES or NO No

9.) Does this project impact state-owned property (i.e.: state facilities, state roads and/or bridges, state parks, forests or other state-owned land.) If yes, please provide the location and a brief explanation.

The project does NOT impact State properties. However construction will take place within the State Right Of Way and will require encroachment permit from DOT 3. The Town has worked with DOT 3 on similar previous projects.

10.) Will any project related activities be conducted within a floodplain\*? YES or NO **No** 

(\*If you answer "yes" to question 10, please be advised that the provisions of the <u>Dept. of Energy and Environmental Protection's Flood Management Certification are applicable.</u>)

11.) Describe the environmental and social impacts of the proposed project. For example, impacts related to traffic, floodplains, natural resources/wetlands, endangered species, archeological resources, historical structures, neighborhoods, utilities, parks, cemeteries etc. (If necessary, attach response in a separate document with the following heading: "Environmental & Social Impacts".)

The project will not have any adverse environmental impacts as the sidewalks are located in an already existing urban area that is not located within a floodplain and is not proximate to any identified sensitive natural resources or wetlands. Routine mitigation measures will be utilized during construction to prevent and impacts that could be caused by soil erosion or stormwater runoff. Positive impacts associated the project include providing a safer pedestrian environment and encouraging pedestrian connectivity to nearby transit stop, local businesses and the Town Library.

12.) Is this project a phase of a larger plan? YES or NO No

If YES, please complete a through e below. If NO, skip to #13.

- a.) What phase are you applying for?
- b.) How many phases are there in total?
- c.) What state agency/agencies administers/administered the previous phase(s)?

Agency Name:

or n/a

d.) Who is/was the state agency contact person for this project?

Agency Contact Name:

or n/a

e.) Attach additional information regarding the overarching, long-term plan if applicable. Attachment heading should read "Long Term Plan".

Attached: YES or NO

13.) What is the amount of Town/Local matching funds for this project?

Amount \$ 26,331

14.) Project Funding – And STEAP Fund Use/Budget

Please complete the attached Funding and Budget Worksheet. The purpose of the work sheet is to reflect how much money has already been spent on the project, how much money will be spent on the project moving forward, what types of expenditures you will use the STEAP funds for, and how much match funding the municipality is committing to the project. You are reminded that STEAP funds cannot be used as a municipal "share" or "match" for any other state of federal grant, and no other state or federal grants can be used to satisfy the "match" for this grant application.

15.) Please summarize amounts and types of funds, if any that have been expended to date for this project.

None

16.) If this is not part of a multi-phase project, has any work already begun? If yes, please summarize.

No work has begun for this project.

17.) If this is a multi-phase project, please provide a brief summary of the work completed to date.

N/A

18.) Should this project be awarded a STEAP grant, how soon after our contract is fully executed, would STEAP funded project work begin? (CHECK ONE BOX BELOW)

30 days

60 days

90 days x 90+ days

(goal is 60-90 days)

19.) Will this project move forward if the requested STEAP funds are not awarded or are awarded only in part? Please explain.

The Town of Fairfield and/or its contractor would reconstruct smaller sections or portions of the project based on existing condition. Other sections could be delayed and/or constructed over the next few years.

- 20.) Was this project <u>not</u> selected in a previous round of STEAP grants? **Correct-This is the first** time Town is submitting this project based on some recent complaints by Commuters, **Businesses**, pedestrians and Library employees.
- 21.) Will this project require a referendum/legislative body vote? If "no", check this box and skip to question 23. If already approved by vote, enter vote date here——and skip to question 23. If to be voted on in future, enter projected date of vote here **Sept 30, 2020 or within 30 days of award notice**. If your application is selected for an award, the project must be approved by vote within 30 days of being notified of the award. A copy of the municipality's approval of the project, whether in resolution format or memorialized in meeting minutes, must be submitted to the administering agency.
- 22.) Has this project been rejected at a previous referendum/legislative body vote? YES or NO **No**. If yes, what has changed that leads you to believe that it will pass at the next referendum/legislative body vote?
- 23.) Has there been, or do you anticipate a measurable level local opposition to the project which may interfere with the expedient use of grant funds should this project be selected for an award?

No-None. Project concept has support by members of the public and Town officials via requests.

24.) Is there any other relevant information you feel may be helpful, please include it below:

Town of Fairfield has fully supported STEAP and Pedestrian Improvement projects in the past. At recent meetings, Town officials have encouraged Engineering to apply for more

grants notably bike and pedestrian type grants. Past STEAP projects located nearby have included Sherman Green Improvements and the Railroad Canopy Project, which the community supported and considered successful.

### Include the following material with your completed and signed application:

- 1. Site location indicated on a flood map Attached
- 2. Property boundary map Attached Row map others referenced.
- 3. Two separate real estate appraisals, if land acquisition is proposed. \*Note: STEAP funds cannot exceed the appraised value established in the appraisals N/A
- 4. Project plans / concept plans Attached
- 5. Proposed project schedule and duration of project (or project phase) to be funded by these STEAP funds should they be awarded Attached
- 6. Project cost estimates supporting the request for funding Attached
- 7. List of necessary local, state, and federal permits and approvals required for the project; list the status of each if applicable

  Attached
- 8. Environmental site assessments (if applicable) N/A
- 9. Any town resolution(s) in support of application for this grant and/or resolutions in support of the project for which you are seeking this grant. (An authorizing resolution to apply for this grant is not required, however other resolutions will be required as part of your contracting process should you be selected to receive an award.) A sample resolution is provided on page 19 of this document. PENDING
- 10. <u>Municipal Certification of Eligibility for OPM Discretionary State Funding (rev. 03/26/18) (Please see the COVID-19-Related Information related to this certification by clicking THIS LINK)</u>

  Attached
- 11. Budget Worksheet that has been provided with this application Attached
- 12. Acceptance & Certification (pages 17 and 18 of this document)

  The loaded in Application (Signed)

# ACCEPTANCE & CERTIFICATION (Page 1 of 2)

This Acceptance and Certification must be read and signed by the Authorized Signatory of the municipality in order for the municipality/project to be considered for STEAP funding.

My signature below, as Authorized Signatory of the Town of Fairfield, indicates acceptance of the following and further certifies that:

- 1. I understand that should this grant application be approved I will be required to sign an assistance agreement/contract with the assigned administering agency delineating the terms and conditions of this grant;
- 2. I will comply with any grant terms and conditions required by the administering agency;
- 3. I understand that various permits and permit-related documentation may be required by the administering agency as required by either the Connecticut General Statutes or Connecticut regulations, including but not limited to a Flood Management Certification;
- 4. I understand that funding associated with this grant application is one-time in nature and that there is no obligation for additional funding from the Office of Policy and Management or the State of Connecticut;
- 5. I understand that if this project warrants a Connecticut Environmental Policy Act (CEPA) review pursuant to Sections 22a-1 through 22a-1h of the Connecticut General Statutes that I will comply with such an environmental assessment. Further, if a CEPA is required, I understand that there are costs associated with such a review and that the municipality is in a position to continue with the proposed project despite this cost;
- 6. I understand that this application will be examined by the Intergovernmental Policy and Planning Division of the Office of Policy and Management for consistency with the State Plan of Conservation and Development and that I may be contacted if additional information is required for that review;
- 7. I understand that projects which convert twenty-five or more acres of prime farmland to a nonagricultural use will be reviewed by the Commissioner of Agriculture, in accordance with Section 22-6 of the Connecticut General Statutes;
- 8. I understand that I am responsible for meeting the requirements to remain eligible for discretionary state funding as outlined at <u>this link</u>.

# ACCEPTANCE & CERTIFICATION (Page 2 of 2)

- 9. I will supply the Office of Policy and Management with all documentation supporting my authority to enter into an assistance agreement, including but not limited to applicable certified minutes and by-laws from the town denoting my authority to apply for the grant and the authority to enter into such an agreement should a grant be awarded;
- 10. I understand that if this application leads to the award of a STEAP grant for this project, that no payment will be made for project expenses incurred prior to the start date, unless such expenditures are satisfactorily determined by the administering agency to be allowed pursuant to the \*COVID-19-Related Provision (page 3) or after the end date as set forth in the fully executed contract; and
- 11. I have read, in full, all pages of this application package, entitled Small Town Economic Assistance Program (STEAP) Guidelines and Application.

Kupchich

Brenda L. Kupchick

Authorized Signatory's Name (Please Print)

First Selectwoman

Title

1. (

08/11/2020

Date

You must save this completed application, then attach your completed application, the separate completed budget workbook, and all other required attachments to an email and send to:

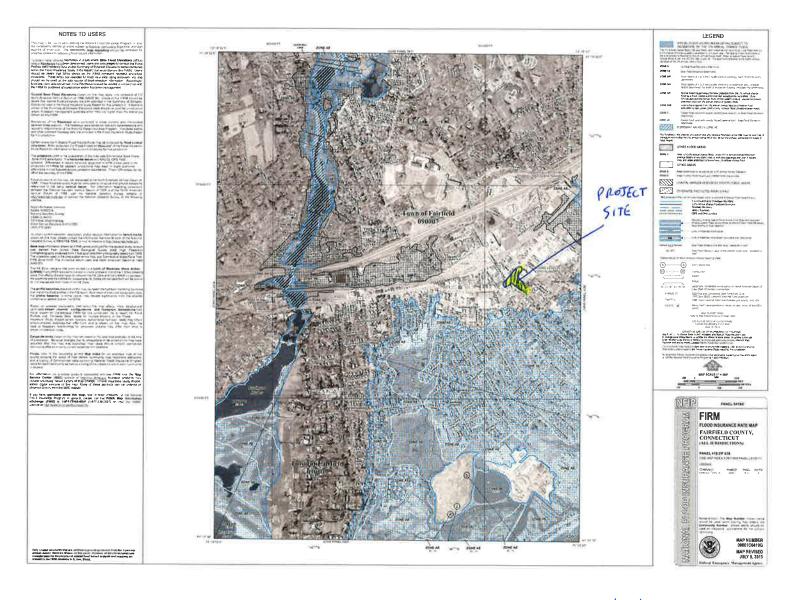
opm.steapapplications@ct.gov

## **ATTACHMENTS**

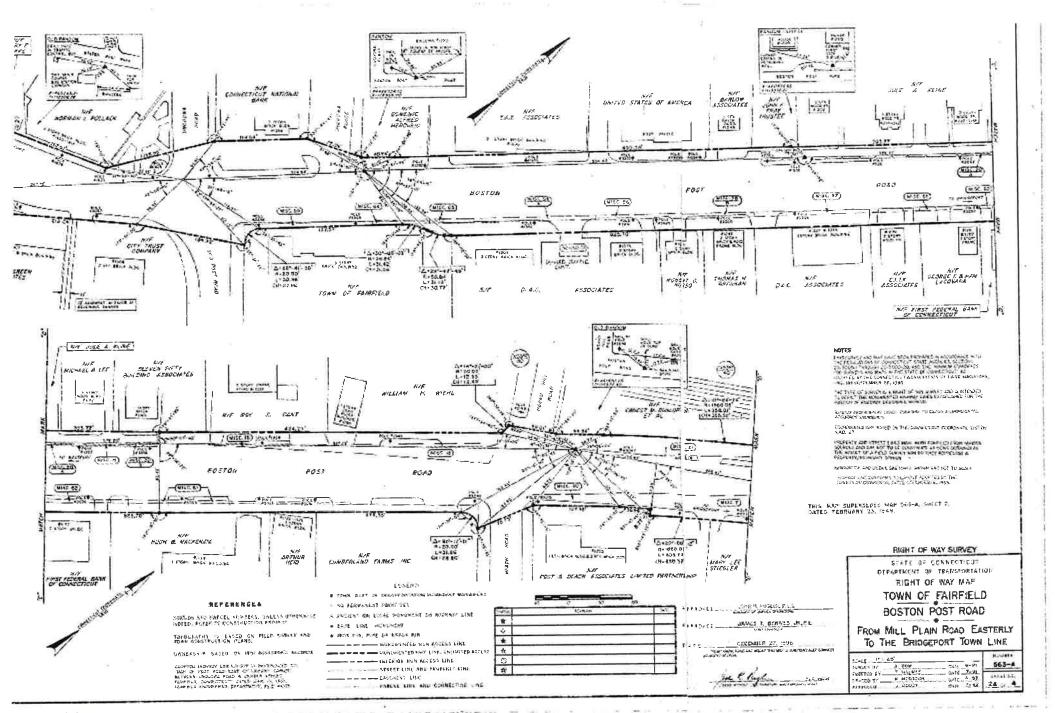
For The 2020

Fairfield STEAP Application

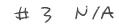
Fairfield Center Ped. Improvements

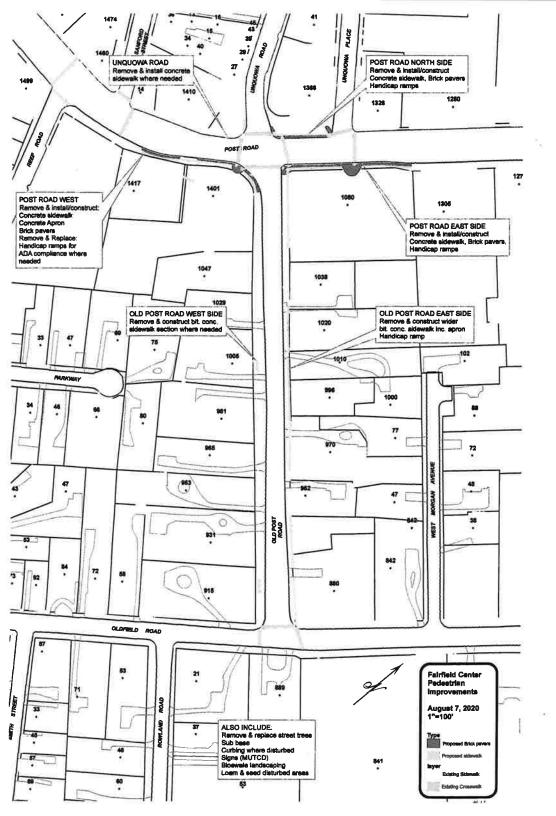


project site outside Floodplain areas.

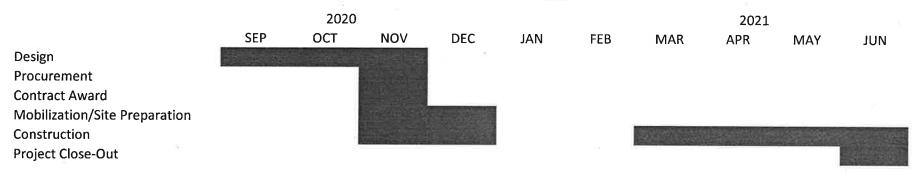


ALSO REFER TO SURVEYS: 1401 POST RD, BL CO (345 KV) LIBRARY SITE PLAN, SHERMAN GREEN/GEIGERICH
(2019) (2009) (~2000) (1986)





# FAIRFIELD CENTER PEDESTRIAN IMPROVEMENTS PROPOSED PROJECT SCHEDULE



Schedule dependent on award date, weather (Dec, Mar?).

### FAIRFIELD CENTER PEDESTRIAN IMPROVEMENTS PROJECT COST ESTIMATE

Replacing all features except those recently reconstructed or good condition.

### POST ROAD US 1 WESTWARD

Item	Est Qnty	Unit Cost		
Concrete Sidewalk/HC ramps	680 sf	11	7,480.00	
Concrete Aprons	1014 sf	14	14,196.00	
Conc. curb wall	70 lf	32	2,240.00	
Reset Manhole/Utility	2 ea	1500	3,000.00	
Brick Pavers	636 sf	20	12,720.00	
Curved conc sidewalk	348 sf	11	3,828.00	
Bus Shelter slab (GBT)	0 sf	11	0.00	
Permitting	1 LS	1000	1,000.00	
MP of Traffic/Police	40 HR	90	3,600.00	
a			3,223.00	\$48,064.00
LIBRARY CORNER	ie			
Concrete Sidewalk	397 sf	11	4,367.00	
Brick Pavers	185 sf	20	3,700.00	
MP of Traffic/Police	40 HR	90	3,600.00	\$11,667.00
Will St. Frame, Folice	40 TIIV	30	3,000.00	311,007.00
DOCT DOAD US 4 SASTWARD			A)	
POST ROAD US 1 EASTWARD				
Concrete Sidewalk	964 sf	11	10,604.00	
Brick pavers	710 sf	20	14,200.00	
Conc Curb backwall	290 If	32	9,280.00	
Replace courtyard bricks	556 sf	20	11,120.00	
Ornamental Lamp Post Relocat	tion est.	0	0.00	\$45,204.00
POST ROAD- NORTH SIDE				
Concrete Sidewalk	400 sf	11	4,400.00	
ADA HC Ramps (long)	1 EA	2500	2,500.00	
Reset Brick Pavers portion	50 sf	16	800.00	Si Si
Brick Pavers	240	20	4,800.00	
Conc. curb wall	100 lf	32	3,200.00	
MP of Traffic	40 HR	90	3,600.00	\$19,300.00
		50	3,000.00	Q15,500.00

OLD POST ROAD (Library driveway to Oldfield Rd intersection)

18,431.00	
2,000.00	
720.00	\$21,151.00
1,650.00	
500.00	\$2,150.00
2,000.00	
5,000.00	\$7,000.00
	\$154,536.00
12	\$154,536.00
	\$128,205.00
6:	\$26,331.00
	2,000.00 720.00 1,650.00 500.00

Permits Required for Fairfield Center Pedestrian Improvements

CT Department of Transportation District 3 encroachment permit

Town of Fairfield Historic District Repair Certificate (already obtained)

note: #8,#9

N/A Pending

### **Municipal Certification of Eligibility for Discretionary State Funding**

(This form to be completed by municipality)

Name of Discretionary Grant Funding Program: Small Town Economic Assistance Program (STEAP)

Name of Municipality & Town Code: 051 Fairfield (hereinafter referred to as "Town/City")

In accordance with C.G.S. § 8-23, as amended by Public Act 15-95, any municipality that has not adopted a plan of conservation and development (POCD) within the past ten years is ineligible for discretionary state funding unless they submit a "Notice of Expired POCD" to the OPM Secretary and to the Commissioners of Transportation, Energy and Environmental Protection, and Community and Economic

Development, and they request and receive a waiver from the prohibition on a grant-by-grant basis from the OPM Secretary
$\boxtimes$ In accordance with C.G.S. § 8-23(a)(1), the Town/City has adopted a POCD within the last ten years; the adopted plan expires 11/15/2026.
☐ The Town/City has <b>not</b> adopted a POCD within the last ten years as required by C.G.S. § 8-23(a)(1) and
☐ In accordance with C.G.S. § 8-23(a)(2), the Town/City has submitted a "Notice of Expired POCD" to the OPM Secretary and the Commissioners of Transportation, Energy and Environmental Protection, and Economic and Community Development that explains why such plan was not adopted within the required ten year period (copy attached).
AND
☐ In accordance with C.G.S. § 8-23(b), the Town/City has submitted a " <u>Waiver Request Letter</u> " to the OPM Secretary requesting a waiver of the discretionary state funding prohibition for this grant application (copy attached).
attest that the aforementioned information is accurate and complete and that I am the representative of the Town/City who is authorized to execute this certification.
Brenda I. Kunchick First Selectwoman

unda L. Kychich

051 Fairfield

### STEAP APPLICATION - 2020 PROPOSED STEAP GRANT USE (PROJECT BUDGET)

TOWN NAME:	Fairfield	
PROJECT TITLE:	Fairfield Center Pedestrian Improvements	
TOTAL PROJECT BUDGET:	\$154,536.00	
STEAP GRANT AMT. REQUESTED:	\$128,205.00	

Please only list expenditures that will be funded by the STEAP grant you are applying for.

PROPSOSED STEAP GRANT USE (PR	OJECT BUDGET)	
Expenditure Category	Description of Expenditure	Amount of STEAP Grant to be used (per category)
Professional Services	In House Design	\$0.00
Acquisition	None expected	\$0.00
Construction	Streetscape, sidewalks, driveway aprons if app., curbs, HC accessible ramps, where needed.	\$128,205.00
Renovation		
Other, describe:	ES .	
Other, describe:		
公的有理是建筑的经	Total should equal 100% of STEAP amount request	ted: \$128,205.00

The total should equal Column C, Row 33 on the Secured Funding Sources tab

Town Name: Fairfield
Project Title: Fairfield Center Pedestrian Improvements

						PEQIECT	FUNDING SOURCES		1.0	
Espenditure Catagory	Amounts funded by this STEAP Application	Provious STEAP Grant Amts.	Secured Federal Funding Amts.	Secured State Funding Arets. (other than STEAR)	List "Secured State Funding Aregs, other then STEAP" Source	Sequend Match Amounts	List "Martch" Funding Source	Approved Capital Budget Fund Arms	Samured "Other Funding" Arres.	List "Other Funding" Source
Tofessional Services:	\$0.00	\$0.00	\$0.00	\$0.00	0	\$0.00				HE GOTH LONGON THREE
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onstruction:	\$128,205,00	\$0.00			0	\$0.00		\$26,931.00		
enovation:	\$0.00	\$0.00				\$0.00		34,551,00		
Other (Ret category below):						,,,,,,				
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	-				15					
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								20 (10-7)		

\$154,536.00

The total in Column C, Bow 33 should equal the amount you are requesting in your STEAP application.

### FAIRFIELD CENTER PEDESTRIAN IMPROVEMENTS PROJECT COST ESTIMATE

Replacing all features except those recently reconstructed or good condition.

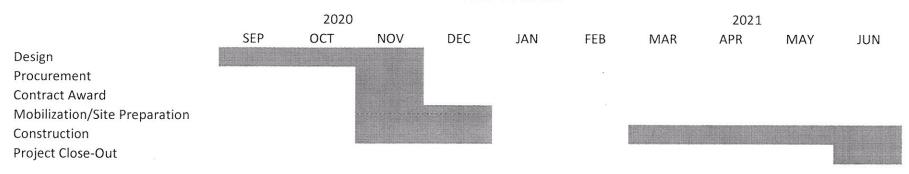
### POST ROAD US 1 WESTWARD

Item	Est Qnty	Unit Cost		
Concrete Sidewalk/HC ramps	680 sf	11	7,480.00	
Concrete Aprons	1014 sf	14	14,196.00	
Conc. curb wall	70 If	32	2,240.00	
Reset Manhole/Utility	2 ea	1500	3,000.00	
Brick Pavers	636 sf	20	12,720.00	
Curved conc sidewalk	348 sf	11	3,828.00	
Bus Shelter slab (GBT)	0 sf	11	0.00	
Permitting	1 LS	1000	1,000.00	
MP of Traffic/Police	40 HR	90	3,600.00	
				\$48,064.00
LIDDADY CODNED				
<u>LIBRARY CORNER</u>				
Concrete Sidewalk	397 sf	11	4,367.00	
Brick Pavers	185 sf	20	3,700.00	
MP of Traffic/Police	40 HR	90	3,600.00	\$11,667.00
POST ROAD US 1 EASTWARD				
Concrete Sidewalk	964 sf	11	10,604.00	
Brick pavers	710 sf	20	14,200.00	
Conc Curb backwall	290 If	32	9,280.00	
Replace courtyard bricks	556 sf	20	11,120.00	
Ornamental Lamp Post Relocation	n est.	0	0.00	\$45,204.00
POST ROAD- NORTH SIDE				
Concrete Sidewalk	400 of	4.4	4 400 00	
ADA HC Ramps (long)	400 sf	11	4,400.00	
Reset Brick Pavers portion	1 EA	2500	2,500.00	
Brick Pavers	50 sf	16	800.00	
Conc. curb wall	240 100 If	20	4,800.00	
MP of Traffic		32	3,200.00	640 222 25
WIF OF FRANKE	40 HR	90	3,600.00	\$19,300.00

 $\underline{\mathsf{OLD}\;\mathsf{POST}\;\mathsf{ROAD}}\;\mathsf{(Library\;driveway\;to\;\mathsf{Oldfield}\;\mathsf{Rd}\;\mathsf{intersection)}}$ 

Item	Est Qnty	Unit Cost			
Asphalt Sidewalk	2633 sf	7	18,431.00		
ADA HC Ramp	1 ls	2000	2,000.00		
MP of Traffic	8 hr	90	720.00	\$21,151.00	
<u>UNQUOWA ROAD</u> ( 5 panels near	r Comm. Theater corne	er)			
Concrete Sidewalk	150 sf	11	1,650.00		
MP of Traffic	1 ls	500	500.00	\$2,150.00	
Misc. Project Items			51		
Misc. Project items		-			
Landscaping, new trees/tree rem	. Is	2000	2 000 00		
Misc. contractor Items	. 1s		2,000.00	ć7.000.00	
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sub base, stone dust material	Iş				
Backfill, loam/seed					
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Subtotal				¢154 526 00	
Subtotul				\$154,536.00	
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TOTAL				\$154,536.00	
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GRANT AMOUNT				\$128,205.00	
TOWN SHARE				\$26,331.00	
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				99	
**					

# FAIRFIELD CENTER PEDESTRIAN IMPROVEMENTS PROPOSED PROJECT SCHEDULE



Schedule dependent on award date, weather (Dec, Mar?).

edestrian Improvements

				PROJECT I	FUNDING SOURCES			
Previous STEAP Grant Amts.	Secured Federal Funding Amts.	Secured State Funding Amts. (other than STEAP)	List "Secured State Funding Amts. other than STEAP" Source	Secured Match Amounts	List "Match" Funding Source	Approved Capital Budget Fund Amts.	Secured "Other Funding" Amts.	List "Other Funding" Source
\$0.00	\$0.00	\$0.00	0	\$0.00				
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\$0.00	\$0.00	\$0.00	0	\$0.00	8 L	\$26,331.00		
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\$0.00	\$0.00	40.00						
\$0.00	\$0.00	\$0.00		\$0.00		\$26,331.00		

\$26,331.00 \$128,205.00

\$154,536.00

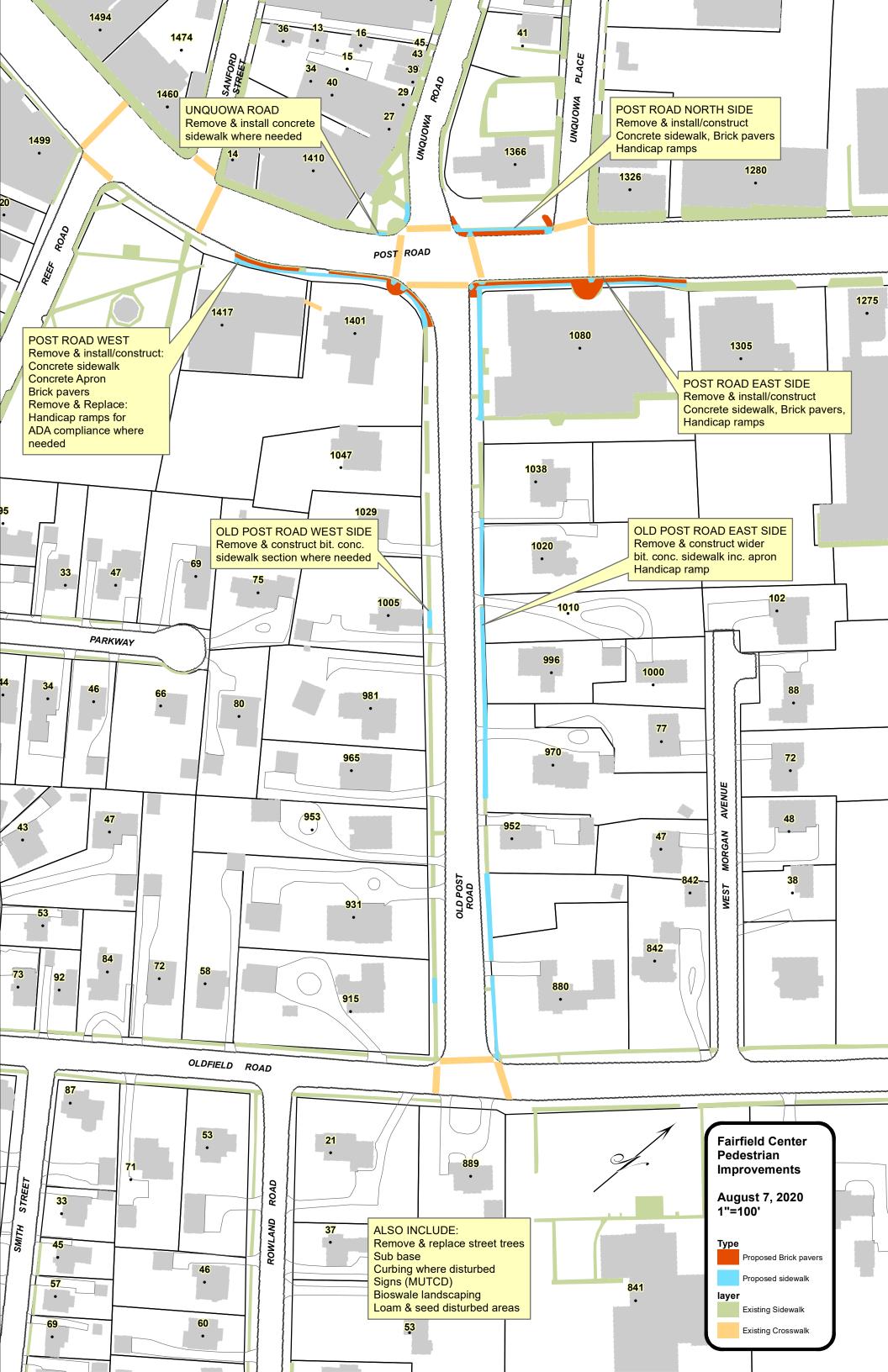
nount you are requesting in your STEAP application.

### STEAP APPLICATION - 2020 PROPOSED STEAP GRANT USE (PROJECT BUDGET)

TOWN NAME:	Fairfield
PROJECT TITLE:	Fairfield Center Pedestrian Improvements
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STEAP GRANT AMT. REQUESTED:	\$128,205.00

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PROPSOSED STEAP GRANT USE (PRO.	JECT BUDGET)	
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Acquisition	None expected	\$0.00
Construction	Streetscape, sidewalks, driveway aprons if app., curbs, HC accessible ramps, where needed.	\$128,205.00
Renovation		
Other, describe:		
	Total should equal 100% of STEAP amount requested	\$128,205.00



## Memorandum

To: Board of Selectmen

From: Mark Barnhart, Director of Community & Economic Development

Date: September 11, 2020

Re: Proposed Re-Acquisition of 350 Quincy Street

On behalf of the Affordable Housing Committee, I am requesting your approval of the Town exercising its option to re-purchase the property known as 350 Quincy Street, which is part of the former Navy housing site also known as Parkview Commons. I am also requesting Board approval of the use of Housing Trust Funds to facilitate said purchase. The Affordable Housing Committee considered and voted unanimously to approve these proposals at its meeting of September 9, 2020.

In 2004, the Town of Fairfield acquired the approximately 7-acre site, which then consisted of twenty-eight (28) single-story, range-style homes, comprising approximately 1100 square feet (see attached floor plan) that were built around 1957 to house military personnel and their dependent families. In 2006, the Town sub-divided the property and subsequently sold 22 of the units as affordable homeownership units to qualified buyers (see subdivision plan). The units are subject to resale price restrictions and ownership is limited to households earning not more than 80% of the Bridgeport-Fairfield area median income (see deed restrictions). The deed restrictions provide the Town with a limited right of first refusal to repurchase the properties if offered for sale.

In 2012, Hurricane Sandy caused significant flooding throughout Fairfield. While the units at Parkview Commons were not heavily damaged, the potential for flooding and future storm damage, as well as the rising cost of flood insurance, have caused the Town and unit owners to consider possible redevelopment alternatives. In 2014, The Town solicited proposals from qualified development partners and subsequently selected New Neighborhoods, Inc., from five respondents. The parties were ultimately unable to secure financing to proceed with the project, however and the parties mutually abandoned the initiative.

Despite this setback, there continues to be interest in pursuing redevelopment of this site to address the flooding/flood insurance concerns and to preserve the existing housing as affordable home ownership units. The plan would require the assemblage of several contiguous parcels as the first step in multi-phased redevelopment plan. The existing units, which are quite dated and energy inefficient, would be demolished, and new duplex units would be built in their place at the proper flood elevation.

The Town is proposing to purchase 350 Quincy Street for \$295,000. The subject parcel is located in a Residence B zone and measures 9,249sf or 0.21 acres. The proposed purchase price is within the calculated maximum resale price of \$305,000 and less than the appraised value (see attached appraisal report). The Town is proposing to use funds from the Housing Trust Fund to purchase the property. The seller has asked for an opportunity to lease the property post-closing for up to 15 months to enable her relocation out-of-state, to which the Town has agreed.

If approved, the proposed purchase requires the approval of the Representative Town Meeting. The proposed purchase acquisition is also subject to the review of the Town Plan & Zoning Commission in accordance with Section 8-24 of the Connecticut General Statutes. Closing is scheduled for October 1, 2020.

I would welcome the opportunity to discuss this proposal and to respond to any questions the Board may have. Thank you again for your consideration.



# Town of Fairfield

Sullivan Independence Hall 725 Old Post Road Fairfield, Connecticut 06824 Town Plan and Zoning Commission

(203) 256-3050

#### INTEROFFICE MEMO

DATE:

**SEPTEMBER 16, 2020** 

TO:

MARK BARNHART

FROM:

JIM WENDT

RE:

350 QUNICY STREET

On September 15, 2020 the Town Plan and Zoning Commission voted unanimously to favorably recommend the Town's acquisition of 350 Quincy Street as outlined in your memo dated September 8, 2020. This recommendation was provided pursuant to Section 8-24 of the CT General Statutes.

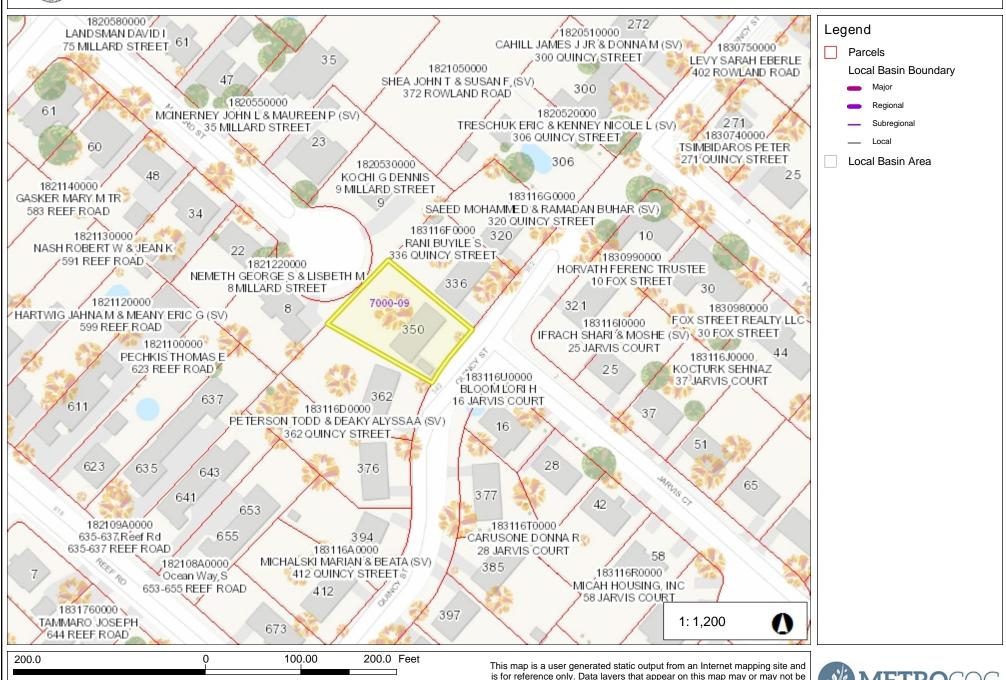


WGS\_1984\_Web\_Mercator\_Auxiliary\_Sphere

Created by Greater Bridgeport Regional Council

## Town of Fairfield

## 350 Quincy Street

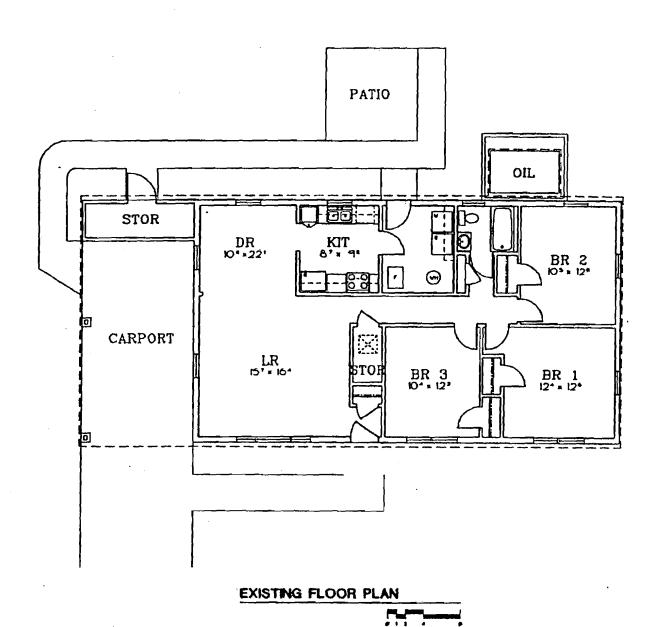


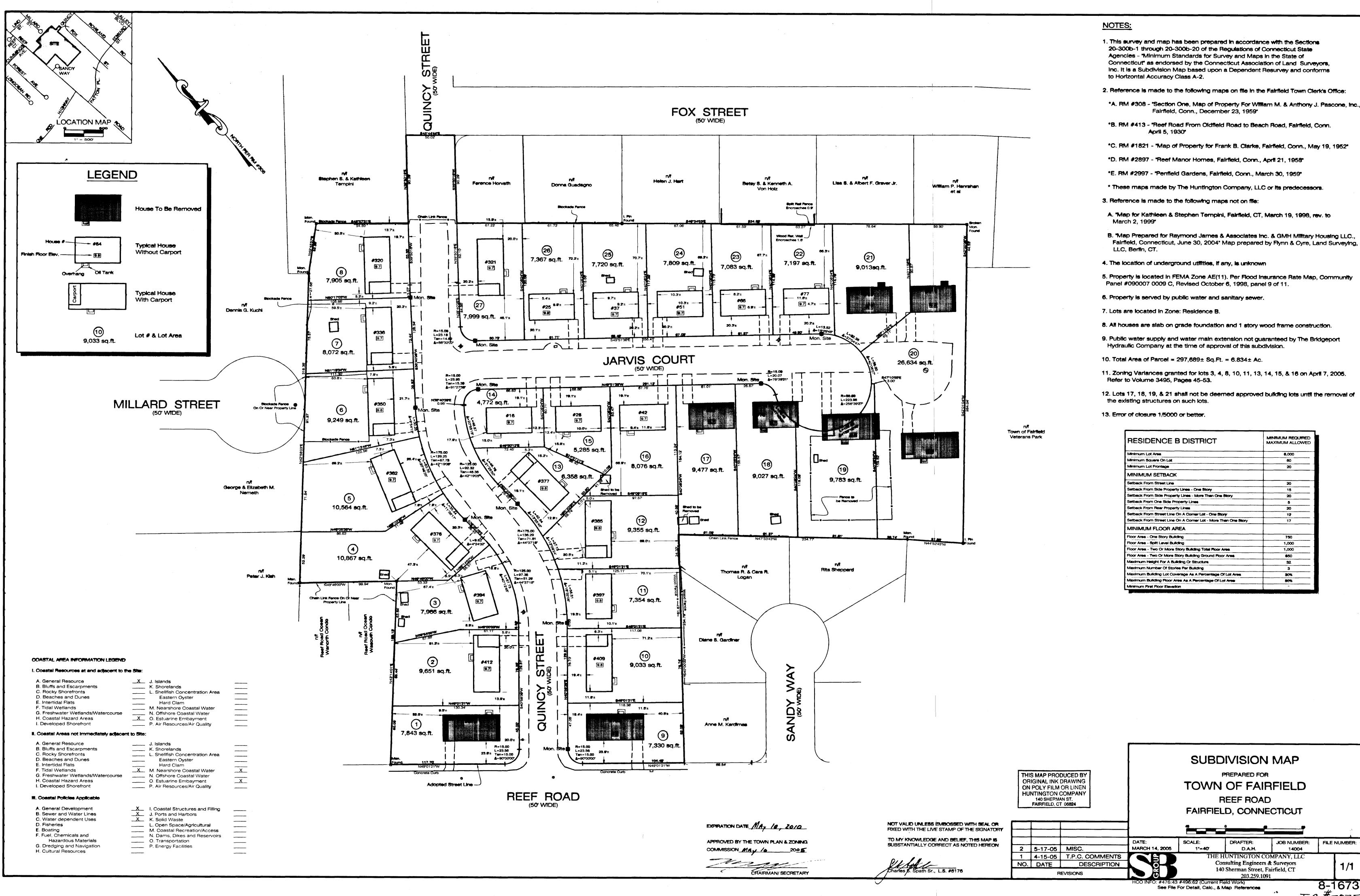
METROCOG Connecticut Metropolitan Council of Governments

accurate, current, or otherwise reliable.

THIS MAP IS NOT TO BE USED FOR NAVIGATION

# 10.2.1 Floor Plan Type F1; 3 BR, Fairfield





### DECLARATION OF COVENANTS, CONDITIONS AND RESTRICTIONS

This Declaration, made on July 8, 2005 by the Town of Fairfield, hereinafter referred to as Declarant.

#### WITNESSETH:

WHEREAS, The Declarant is the Owner of certain property in the Town of Fairfield, consisting of 20 lots more fully described on Exhibit A attached hereto (the "Properties"; each individual lot, the "Property"); and

WHEREAS, the acquisition of the Properties was approved by the Board of Selectman, the Board of Finance and the Representative Town Meeting on the condition that the Properties would be used to provide affordable Owner-occupied housing for low and moderate income households (as hereinafter defined);

NOW, THEREFORE, Declarant hereby declares that all of the Properties shall be held, sold and conveyed to the Owners thereof (collectively, the "Owners") subject to the following easements, restrictions, covenants and conditions which are to further the purpose of maintaining the Properties as affordable Owner-occupied housing for low and moderate income households and which shall run with the real property and be binding on all parties having any right, title or interest to the Properties or any part thereof, their heirs, successors and assigns and shall inure to the benefit of each owner (the "Owner" regardless of the number of persons who are titleholders) thereof.

#### 1. USE AND OCCUPANCY

#### 1.1 RESIDENTIAL USE ONLY

The Property shall be used for residential purposes only and shall not be used for any commercial purpose, regardless of the fact that such purpose may be permitted under the Fairfield Zoning regulations.

#### 1.2 OCCUPANCY

The Owner must occupy the Property as the Owner's principal residence. The Owner may not lease the Property or any portion of the Property to any other person, nor take in boarders or paying guests. Violation of this covenant shall give Declarant a right to repurchase the Property from Owner at Owner's Original Purchase Price, as defined below, without any adjustment, provided that the price will not be lower than the amount due to Owner's first mortgagee at the time of repurchase.

#### 1.3 PERMITTED CAPITAL IMPROVEMENTS

The Owner shall make no improvements which are not Permitted Capital Improvements to the Property. For purposes of this Declaration, Permitted Capital Improvements means permanent, fixed and non-cosmetic improvements to the Property which have been made with the prior written approval of the Declarant and which are undertaken with all necessary permits and approvals having been obtained prior to construction. The amount attributable to such improvements must be demonstrated by the Owner through documentation verifiable by the Declarant. The cost of Permitted Capital Improvements may not exceed 10% of the Original Purchase price of the Property during the first five years of Ownership. For each five year period of Ownership thereafter the Owner is entitled to a new allowance for Permitted Capital Improvements equal to 10% of the Original Purchase Price. Permitted Capital Improvement allowances expire to the extent not used during a five year period at the end of that period. Landscaping and other ordinary maintenance and repair may be undertaken by the Owner and shall not constitute Permitted Capital Improvements.

#### 2. RESTRICTIONS ON RESALE

- 2.1 TRANSFER TO LOW OR MODERATE INCOME HOUSEHOLDS: Upon compliance with the provisions of 2.3 and 2.5, Owner may only sell, transfer, or otherwise dispose of the Property to a person or persons who are members of a low or moderate income household, as defined herein. Owner shall not, in any event, make such sale, transfer or other disposition directly to any other person or entity without following the procedure set forth below, except in the case of a sale, transfer or other disposition to a Permitted Mortgagee in lieu of foreclosure.
- 2.2 DEFINITION OF LOW AND MODERATE INCOME HOUSEHOLDS: low and moderate income households shall mean households consisting of two or more persons whose combined adjusted gross income is no more than 80% of the Area Median Income ("AMI") as published by the United States Department of Housing and Urban Development ("HUD") or such other criteria for low and moderate income households as may be established by Declarant from time to time. The final determination of whether a particular household is a low or moderate income household will be made by the Declarant.
- 2.3 NOTICE TO DECLARANT: Except in the case of a sale, transfer or other disposition to a Permitted Mortgagee in lieu of foreclosure, in the event the Owner contemplates sale, transfer or disposition of the Property to a third party, then:
  - (a) Owner shall give Declarant notice that such Property will be offered for sale to a low or moderate income household as defined in this document, which notice shall contain a detailed listing of the terms and conditions of such intended sale. Within thirty (30) days of Declarant's receipt of such notice, Declarant shall:

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(i) determine the Maximum Resale Price as defined below; and

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- (ii) notify the Owner whether Declarant intends to exercise its right of first refusal; and
- (iii) if Declarant waives its right of first refusal, notify the Owner that such party is free to sell the Property on the open market (a) to any party who qualifies as a low or moderate income household as defined in this document, (b) at a price not to exceed the then applicable Maximum Resale Price; subject to all the terms and conditions of this document. If Declarant maintains a list of interested qualified low and moderate income households, Declarant may inform the persons on such list that a Property is for sale.
- 2.4 DECLARANT'S RIGHT OF FIRST REFUSAL: Upon notice in accordance with Section 2.3, Declarant shall have a right of first refusal to purchase Owner's Property at a price not to exceed the Maximum Resale Price.
- 2.5 WAIVER OF RIGHT OF FIRST REFUSAL: Declarant shall notify Owner of its waiver of its right of first refusal or its intention to purchase within thirty (30) days after receiving notice in accordance with Section 2.3, unless Declarant is unable to get a necessary approval from a Town body in which case the time for response will be extended until the body takes action, or its right will expire. If Declarant does not exercise its right of first refusal within 30 days or such additional time as it requires to obtain an approval, it must provide Owner with a certificate in recordable form stating that it has waived its right of first refusal. Such certificate shall be recorded at the same time as the deed to the subsequent Owner.

#### 2.6 DETERMINATION OF MAXIMUM RESALE PRICE

Whenever Owner desires to sell the Property, Owner shall notify Declarant in accordance with Section 2.3, of this document. Upon receiving such notice, Declarant shall establish the Maximum Resale Price for the Property. The initial Maximum Resale Price shall be equal to the Owner's original purchase price ("Original Purchase Price") for the Property.

- (a) When the Property is sold, the Original Purchase Price shall be adjusted in the following manner:
  - (i) By calculating the increase in the Consumer Price Index for All Urban Consumers (CPI-U) for the New York, Northern New Jersey, Long Island metropolitan area for housing related items from the month and year of Owner's date of purchase of the Property to the month and year in which Owner gives notice of intent to sell, and by adding to that
  - (ii) The cost of Permitted Capital Improvements.

- (b) Notwithstanding anything contained in this document, the Maximum Resale Price may never be reduced to an amount which is lower than (i) the Original Purchase Price or (ii) the amount of the first mortgage on the Property at the time of adjustment, whichever shall be higher.
- 2.7 TRANSFER TO OWNER'S HEIRS: If an Owner dies and there is a surviving co-Owner previously approved by Declarant, the co-Owner may take sole title to the property with no need to obtain approval from Declarant but must notify Declarant within thirty (30) days after the transfer. Upon receipt of notice from the executor of the decedent Owner's estate within ninety (90) days of the death of the Owner (or the last surviving co-Owner of the Property) Declarant shall agree to the transfer of the Property to Owner's heirs or specific devisee if such person or persons are not minors, and are qualified as a low or moderate income household as determined by the Declarant in accordance with Section 2.2 hereof. In addition such person or persons shall each make a written statement under oath and in recordable form that such person or persons will be bound by this document and will occupy the property as the person's or persons' principal residence. The Declarant shall have no right of first refusal and no new Maximum Resale Price shall be established. In the event that there is no qualified heir or specific devisee or that no qualified heir or specific devisee is willing or able to make the sworn statement just prescribed, the Maximum Resale Price shall be determined by Declarant and the Property shall be sold for the benefit of the Owner's estate under the same terms and conditions as other sales.
- 2.8 TRANSFER TO A CO-OWNER BY GIFT OR SALE: In the event that one co-Owner wishes to transfer the Property to another previously approved co-Owner by gift, the co-Owner may take sole title to the property with no need to obtain approval from Declarant but must notify Declarant within thirty (30) days after the transfer. The Declarant shall have no right of first refusal and no new Maximum Resale Price shall be established. In the event that the co-Owner wishes to transfer the property to another previously approved co-Owner by sale, The selling co-Owner will give notice to Declarant as provided in Section 2.3 and Declarant will determine the Maximum Resale Price. The Declarant shall have no right of first refusal. The selling co-Owner shall give the Declarant notice of the actual sale price which will become the new Maximum Resale Price.
- 2.9 WAIVER OF RESALE AND OCCUPANCY RESTRICTIONS IN THE CASE OF FORECLOSURE: Notwithstanding any provision in this document to the contrary, Article 2 and Article 1, Section 1.2 shall terminate and have no further force and effect upon the occurrence of one of the following events until the Property is resold at which time all requirements of these Declarations shall again be applicable:
  - (a) Title to Owner's Property and Equity of Redemption is acquired by a Holder of a Permitted Mortgage, HUD, or another party upon foreclosure of a mortgage insured by HUD, or by any other mortgage insurer.

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- (b) Title to Owner's Property and Equity of Redemption is acquired by a Holder of a Permitted Mortgage or HUD by deed or assignment in lieu of foreclosure of a HUD insured mortgage, or a mortgage insured by any other mortgage insurer.
- (c) A mortgage insured by HUD or any other mortgage insurer is assigned to HUD.

WITNESS:

TOWN OF FAIRFIELD, DECLARANT

Kenneth A. Flatto, First Selectman

diesti

y alish

nnifu S. Carpenter

STATE OF CONNECTICUT)

) ss: Town of Fairfield

COUNTY OF FAIRFIELD )

On this 8th day of July, 2005, before me, the undersigned officer, personally appeared KENNETH A. FLATTO, the First Selectman of the Town of Fairfield, known to me or satisfactorily proven to be the person whose name is subscribed to the within instrument and acknowledged that he executed the same for the purposes therein contained as his free act and deed and the free act and deed of said Town.

Notary Public

SUZANNE GODLESKI NOTARY PUBLIC My Commission Expires Nov. 30, 2004

#### Schedule A

All that certain piece or parcel of land together with the improvements thereon located in the Town and County of Fairfield and State of Connecticut being shown and depicted as Lots 2-14 and Lots 21-27 on a certain Map entitled "Subdivision Map Prepared for Town of Fairfield Reef Road Fairfield, Connecticut" prepared by the Huntington Company, LLC dated March 14, 2005 and filed on the land records of the Town of Fairfield as Map No. 7075.

RECEIVED FOR RECORD

JUL - 8 2005

ATTEST: The guide

## **APPRAISAL OF REAL PROPERTY**



## **LOCATED AT**

350 Quincy St # 2 Fairfield, CT 06824 Vol: 4894 Pg: 173 11/16/2012

#### **FOR**

Town of Fairfield 611 Old Post Rd. Fairfield, CT 06824

## **OPINION OF VALUE**

298,000

## AS OF

09/04/2020

## BY

Stephanie A Gaffney Marshall Properties LLC

203-209-9998 MarshallPropertiesLLC@aol.com

## Uniform Residential Appraisal Report

File # 350 Quincy2

The purpose of this summary appraisal repo	ort is to provide the lender/client with a	n accurate, and adequately supported, o	pinion of the market value	of the subject property.
Property Address 350 Quincy St # 2		City Fairfield	State CT	Zip Code 06824
Borrower Owner: Headly	Owner of Public Re		County Fairfie	
Legal Description Vol: 4894 Pg: 173	11/16/2012	,		
Assessor's Parcel # 183 - 116 E		Tax Year 2019	R.E. Taxes \$ 4	1.054
Neighborhood Name Fairfield Center		Map Reference 14860	Census Tract C	0615.00
Occupant X Owner Tenant Vac	ant Special Assessmen		UD HOA\$O	per year per month
Property Rights Appraised  Fee Simple	Leasehold Other (describe)			
Assignment Type Purchase Transaction		er (describe) Fair Market Value		
Lender/Client Town of Fairfield		Old Post Rd. Fairfield, CT 06824		
Is the subject property currently offered for sale of				Yes 🔀 No
Report data source(s) used, offering price(s), and		ionale phot to the encourte date of the applic		100 🔀 110
Troport data obaroo(o) about, orioning prico(o), and	Tutto(o). IVIES			
I did did not analyze the contract for	cale for the cubiect nurchase transaction. Ev	plain the results of the analysis of the contrac	et for cale or why the analysis	was not
performed.	sale for the subject purchase transaction. La	piant the results of the analysis of the contract	of for sale of with the analysis	was not
-				
Contract Price \$ Date of Con	tract Ic the property ce	ler the owner of public record?	No Data Source(s)	
Is there any financial assistance (loan charges, s	1 1 7	<u> </u>		Yes No
If Yes, report the total dollar amount and describe		ance, etc.) to be paid by any party on benan	or the portower:	165 NU
il Yes, report the total dollar amount and describe	e the items to be paid.			
Note Born and the model of some of the of the				
Note: Race and the racial composition of the			1 2 11 7: 11	B
Neighborhood Characteristics		Unit Housing Trends	One-Unit Housing	Present Land Use %
Location Urban Suburban	Rural Property Values Increa	<u> </u>	PRICE AGE	One-Unit 91 %
Built-Up 🔀 Over 75% 🗌 25-75% 🗌	Under 25% Demand/Supply Shorta		\$ (000) (yrs)	2-4 Unit 2 %
Growth Rapid X Stable	Slow Marketing Time Under	3 mths $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	200 Low 0	Multi-Family %
Neighborhood Boundaries The subject	is bound north by Rte 1, south by	Fairfield Beach Road, west by	1,200 High 350	Commercial 6 %
South Pine Creek Rd and east by Be			400 Pred. 50	Other 1 %
-		edominantly single family residence		1
subject neighborhood is located conv				
	, a. a	,a, o aa oooo.		
Market Conditions (including support for the above	/e conclusions) Market conditi	ons in the subject town are consid	larad ralativaly stable	Properties which are
priced properly sell within a reasonal	•	-		
vacant land, and places of worship.	ole period of time as mortgage rai	es are considered lavorable. 170 v	other land use includes	parks, scribbis,
Dimensions See attached map/deed	Area 9148 sf	Shape Rectangu	lar View N;	Poor
Specific Zoning Classification B			iai view in,	res,
	conforming (Grandfathered Use) No			
			Yes No If No, des	oribo I II ala ant a and
Is the highest and best use of subject property as	. , , , , , , , ,			
best use of the property is considere				
Utilities Public Other (describe)			rovements - Type	Public Private
Electricity \( \sum_{\text{\tinc{\text{\texit}\xi}\\ \text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\texi{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\ti}\xi}\\ \text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\tint{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\te}\tint{\text{\text{\text{\text{\text{\text{\text{\text{\text{\tetx{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\ti}\}\tittileft{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\tin}}\tint{\text{\text{\text{\text{\text{\text{\texi}\text{\text{\text{\text{\text{\texi}\text{\text{\texicleft{\text{\texi}\tint{\tiinte\text{\text{\text{\text{\text{\texi}\tint{\text{\texit{\text{\ti}	Water X	Street As		lacksquare
Gas None	Sanitary Sewer	Alley No		D-t- 0=10010010
FEMA Special Flood Hazard Area Yes	No FEMA Flood Zone AE	FEMA Map # 09001C0438G	FEMA Map	Date 07/08/2013
Are the utilities and off-site improvements typical		No If No, describe	□ Va. ► Na	If Van danagha
Are there any adverse site conditions or external	· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	Yes 🔀 No	If Yes, describe
No apparent adverse influences or co	onditions were noted at the time of	of the inspection.		
		In	1 / pp 1	, , , , , , , , , , , , , , , , , , , ,
General Description	Foundation		als/condition Interior	materials/condition
	Crawl Space Crawl Space	Foundation Walls Concrete/		Laminate/Gd
# of Stories 1	Full Basement Partial Baseme	7 7 . 0 . 0	· -	Drywall/Avg
		sq.ft. Roof Surface Asph shing		Wood/Avg
	Basement Finish 0	% Gutters & Downspouts Aluminum		Ceramic/Avg+
Design (Style) Ranch	Outside Entry/Exit Sump Pump	Window Type Dbl Hung/	Avg Bath Wainsco	t Ceramic/Avg+
Year Built 1957	Evidence of Infestation	Storm Sash/Insulated yes/Avg	Car Storage	None
Effective Age (Yrs) 18	Dampness Settlement	Screens yes/Avg	<b>X</b> Driveway	# of Cars 1
Attic None	Heating <b>X</b> FWA ☐ HWBB ☐ Ra		ove(s) # 0 Driveway Surf	
Drop Stair Stairs	Other Fuel Oil	Fireplace(s) # 0 Fence	.,	# of Cars O
וואוט אווען   אווען אווען   אווען אווען			None Carport	# of Cars 1
		Patio/Deck 1   Porch		
Floor Scuttle	Cooling Central Air Conditioning			
Floor Scuttle Finished Heated	Cooling Central Air Conditioning  Moderate Other	Pool None Other	None 🔀 Att.	Det. Built-in
Floor Scuttle Finished Heated Appliances Refrigerator Range/Oven	Cooling Central Air Conditioning Individual Other Dishwasher Disposal N	Pool None ☐ Other ☐ Other ☐ Other ☐ Other	None Att. (describe)	Det. Built-in
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Floor Scuttle  Finished Heated  Appliances Refrigerator Range/Oven Finished area above grade contains:  Additional features (special energy efficient items  restrictions. Please refer to attach Describe the condition of the property (including ago; Bathrooms-updated-one to five ybeen updated at some point. They have newer. The subject offers an extensive	Cooling Central Air Conditioning Individual Other Disposal N 6 Rooms 3 Bedrooms , etc.). The subject property ed deed and resale calculations needed repairs, deterioration, renovations, re years ago; The subject is very well ave newer flooring & appliances. ve rear patio with two fireplaces. Inditions that affect the livability, soundness,	Pool None Other flicrowave Washer/Dryer Other 1.0 Bath(s) 1,1 is deed restricted based on inc. modeling, etc.). C3;Kitche maintained on the interior and ex The interior has newer laminate flo The rear yard is fenced in and priv or structural integrity of the property?	None Att.  (describe)  96 Square Feet of Gross Liven requirements and en-updated-one to five terior. The kitchen and poring throughout the inate.	Det. Built-in  ring Area Above Grade  d resale  years bathroom have nterior. The roof is
Floor Scuttle Finished Heated  Appliances Refrigerator Range/Oven Finished area above grade contains:  Additional features (special energy efficient items restrictions. Please refer to attach Describe the condition of the property (including ago; Bathrooms-updated-one to five y been updated at some point. They have newer. The subject offers an extension and the property of the pr	Cooling Central Air Conditioning Individual Other Disposal N 6 Rooms 3 Bedrooms , etc.). The subject property ed deed and resale calculations needed repairs, deterioration, renovations, re years ago; The subject is very well ave newer flooring & appliances. ve rear patio with two fireplaces. Inditions that affect the livability, soundness,	Pool None Other flicrowave Washer/Dryer Other 1.0 Bath(s) 1,1 is deed restricted based on inc. modeling, etc.). C3;Kitche maintained on the interior and ex The interior has newer laminate flo The rear yard is fenced in and priv or structural integrity of the property?	None Att.  (describe)  96 Square Feet of Gross Livome requirements an en-updated-one to five terior. The kitchen and poring throughout the inate.	Det. Built-in  ring Area Above Grade  d resale  years bathroom have nterior. The roof is

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Fannie Mae Form 1004 March 2005

## Uniform Residential Appraisal Report

File # 350 Quincy2

							the subject neighborh							\$ 320	•	•
				neighb			the past twelve mon	hs ran				0			20,000	
FEATURE		SUBJECT					LE SALE # 1	COMPARABLE SALE # 2  16 Jarvis Ct			COMPARABLE SALE # 3  117 Granville St			3		
Address 350 Quincy St # 2					rvis C							1				
Fairfield, CT 0682	24				eld, C		24			T 0682	24			T 068	24	
Proximity to Subject Sale Price	\$			0.06	miles	SE	\$ 280.000		miles		\$ 280,000		miles		\$	057.000
Sale Price/Gross Liv. Area	\$		sq.ft.	¢ ,	224 44	ca ft	\$ 280,000		234.1		\$ 280,000		201.4		φ	257,000
Data Source(s)	φ				234.11		DOM 22			լ	OM 7			1 sq.ft.	DOM 67	
Verification Source(s)					17024 5860 F		,			7302,L Pg: 70				96936. Pg: 22	DOM 67	
VALUE ADJUSTMENTS	DF:	SCRIPTI	ON		SCRIPTI		+(-) \$ Adjustment		SCRIPT		+(-) \$ Adjustment		SCRIPT			djustment
Sales or Financing	DE	001111 11	011	NonA		011	r ( ) ψ παjασαποπε	Non		1011	i ( ) ψ / (α)ασαποπε	Arml		1011	1 ( ) Φ / ιι	ajuotimont
Concessions					neld:0			Conv				FHA				
Date of Sale/Time					9;c11	/19	+14,000			/18	+14,000			5/19		+12,850
Location	N;Re:	s:		N;Re			111,000	N;Re		, 10	111,000	N;Re		<i>,,</i> 10		12,000
Leasehold/Fee Simple		Simple			Simple	!			Simple	9			ehold			+15,000
Site	9148			7841	•		0	4792			+3,000					,
View	N;Re			N;Re				N;Re			, , , , ,	N;Re				
Design (Style)		Ranch			Ranch				Ranch	n			Ranc	h		+15,000
Quality of Construction	Q4			Q4				Q4				Q4				
Actual Age	63			63				63				27				0
Condition	C3			СЗ				СЗ				СЗ				
Above Grade	Total	Bdrms.	Baths		Bdrms.	Baths		Total	Bdrms.	Baths		Total	Bdrms.	Baths		
Room Count	6	3	1.0	6	3	1.0		6	3	1.0		5	3	1.1		-5,000
Gross Living Area		1,196	sq.ft.		1,196	sq.ft.			1,196	sq.ft.			1,276	sq.ft.		-4,000
Basement & Finished	0sf			0sf				0sf				0sf				
Rooms Below Grade																
Functional Utility	Avera	age		Avera	age			Aver	age			Aver	age			
Heating/Cooling	FHA/I	No AC	;	1/WH	No AC		0	FHA	/CAC		-6,000	HW/	No AC	)		0
Energy Efficient Items	Typic	al		Typic	al			Typi	cal			Туріс	cal			
Garage/Carport	1cp1	dw		1dw			+3,000	1dw			+3,000	1dw				+3,000
Porch/Patio/Deck	Lrg P	atio		Sml (	OP		+3,000	N/A			+6,000	Patio	)			+3,000
Fireplaces	0 Fpl			0 Fpl				0 Fp				0 Fp				
Misc.																
Net Adjustment (Total)				X		-	\$ 20,000		+ [		\$ 20,000		+ [		\$	39,850
Adjusted Sale Price				Net Ad	j.	7.1 %		Net Ad	-	7.1 %		Net Ac	-	15.5 %		
of Comparables				Gross		7.1 %	,			11.4 %	\$ 300,000	Gross	Adj.	22.5 %	\$	296,850
I 🔀 did 🗌 did not research t	he sale	or trans	fer histo	ry of th	e subjec	t prope	rty and comparable sal	es. If no	ot, explai	n						
	not revea	al any pr	rior sale	s or trai	nsfers of	f the su	bject property for the th	ree yea	irs prior	to the ef	fective date of this app	raisal.				
Data Source(s) Town Hall																
				s or trai	nsfers of	the co	mparable sales for the	year pri	or to the	date of	sale of the comparable	sale.				
Data Source(s) Town Hall																
Report the results of the research a	and anal	ysis of t			transfer	nistory							n page 3	,	24515.041	- "O
ITEM			50	IBJECT			COMPARABLE S	ALE #	l	Ü	OMPARABLE SALE #	2		CUMPA	RABLE SALI	E #3
Date of Prior Sale/Transfer																
Price of Prior Sale/Transfer	-												ļ			
Data Source(s)  Effective Data of Data Source(s)		Assess		ecord	S		Assessor's record	IS			ssor's records				records	
Effective Date of Data Source(s)		)5/26/2			d sama		05/26/2020			05/26/		•		6/2020		
Analysis of prior sale or transfer his				-	-						own to have trans			e past	36 montr	ns. The
sales utilized have not train	nsterre	ea in ti	ne pas	st 12 i	month	s torn	the effective dat	e ot tr	ne app	raisai,	uniess otnerwise	state	ea.			
Summary of Sales Comparison Ap	nrnach	_	'hic ro	nort	wac 11	ndate	ed from a previo	uc an	nraio	al rong	ort datad 0E/26/2	020 7	The n	act for	v month	o in
Fairfield County in gene				_		_			_							
relocate from New York Obviously, cities are mo																
increased risk of contract				_											-	
buyers and a shortage o																/liet
price. The appraiser has																/IISt
***See attached addenda.		iucu t		igiliai	аррі	uisui	on this property	1010	iicci ti	1113 1110	orcase in interes	t and	111010	usc III	риссэ.	
Indicated Value by Sales Comparis		nach \$	20	98.000	1											
Indicated Value by: Sales Compa				, , , , ,	3.000	- (	Cost Approach (if dev	eloned	<b>)</b> \$		Income App	roach	if deve	loped) \$	1	
The weight for final value					-,		•••		•	Comp			•	• •		moet
reliable approach when va market. This property is												15 01 1	пе тур	icai bi	iyer iii ar	гореп
This appraisal is made as i							and specifications of					at the	imnrove	ments	nave heen	
completed, Subject to the																t to the
following required inspection bas																
record which are included									וווו טטע					ie rest		
	in this	s repoi		.,			io containon or contain	,	703 1101	Toquilo	altoration of ropair.	Subjec	or to ti	ie rest	ilctions o	'I
baseu on a complete visual	inspec	tion of	rt. the ir	nterior	and ex	kterior	areas of the subje	ct pro	perty.	defined	scope of work, st	atemen	t of a	ssumpti	ons and	
conditions, and appraiser's c \$ 298,000 , as of	inspec ertificat	tion of	rt. the ir y (our)	nterior ) opini	and ex	xterior the m	areas of the subje	ct pro	perty,	defined real pro	scope of work, stoperty that is the	atemen subject	t of a	ssumpti	ons and	

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Fannie Mae Form 1004 March 2005

## Uniform Residential Appraisal Report

File# 350 Quincy2

Age adjustments were not deemed necessary as all comparables and the condition differed, a condition adjustment was applied. A buyer will not pa				tive ages. If		
Please note that town records are not always accurate when listing basement and finished basement areas. Therefore, the appraiser has tempered town information with MLS listing information for purposes of determining basement and finished basement area.						
Contract dates for comparables was taken from the MLS information whice the actual contracts for the comparable properties.				have access to		
The appraiser assumes title is clear and marketable. The appraiser is not a title searcher.						
It is noted that the subject's appraised valuation is lower than the predominant value for the subjects neighborhood. Please remember that the						
predominant value for the subject's neighborhood included all homes sales, just not similar homes like the subject, or similar comparable sales to the subject. Page 1 of this report is requesting the predominant values for all homes in the subject's neighborhood which can be confusing and at times misleading, especially in a very diverse area of existing, older, newer, smaller and larger homes. The fact that the subjects estimated value is higher or lower than the reported predominate value does not have any adverse effect on its value or marketability.						
Highest and best use of the property is considered it's current residential use. Highest and best use analysis takes into consideration the present zoning regulations, building codes and setbacks, and existing improvements located on the property.						
	(not required by Fannie Mae)					
Provide adequate information for the lender/client to replicate the below cost figures and calculatio	ns.	and value wa	s calculated utiliz	ing area land		
	ns.	and value was	s calculated utiliz	ing area land		
Provide adequate information for the lender/client to replicate the below cost figures and calculatio Support for the opinion of site value (summary of comparable land sales or other methods for esti	ns.	and value was	s calculated utiliz	ing area land		
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This report form is designed to report an appraisal of a one-unit property or a one-unit property with an accessory unit; including a unit in a planned unit development (PUD). This report form is not designed to report an appraisal of a manufactured home or a unit in a condominium or cooperative project.

This appraisal report is subject to the following scope of work, intended use, intended user, definition of market value, statement of assumptions and limiting conditions, and certifications. Modifications, additions, or deletions to the intended use, intended user, definition of market value, or assumptions and limiting conditions are not permitted. The appraiser may expand the scope of work to include any additional research or analysis necessary based on the complexity of this appraisal assignment. Modifications or deletions to the certifications are also not permitted. However, additional certifications that do not constitute material alterations to this appraisal report, such as those required by law or those related to the appraiser's continuing education or membership in an appraisal organization, are permitted.

SCOPE OF WORK: The scope of work for this appraisal is defined by the complexity of this appraisal assignment and the reporting requirements of this appraisal report form, including the following definition of market value, statement of assumptions and limiting conditions, and certifications. The appraiser must, at a minimum: (1) perform a complete visual inspection of the interior and exterior areas of the subject property, (2) inspect the neighborhood, (3) inspect each of the comparable sales from at least the street, (4) research, verify, and analyze data from reliable public and/or private sources, and (5) report his or her analysis, opinions, and conclusions in this appraisal report.

INTENDED USE: The intended use of this appraisal report is for the lender/client to evaluate the property that is the subject of this appraisal for a mortgage finance transaction.

INTENDED USER: The intended user of this appraisal report is the lender/client.

DEFINITION OF MARKET VALUE: The most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller, each acting prudently, knowledgeably and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby: (1) buyer and seller are typically motivated; (2) both parties are well informed or well advised, and each acting in what he or she considers his or her own best interest; (3) a reasonable time is allowed for exposure in the open market; (4) payment is made in terms of cash in U. S. dollars or in terms of financial arrangements comparable thereto; and (5) the price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions\* granted by anyone associated with the sale.

\*Adjustments to the comparables must be made for special or creative financing or sales concessions. No adjustments are necessary for those costs which are normally paid by sellers as a result of tradition or law in a market area; these costs are readily identifiable since the seller pays these costs in virtually all sales transactions. Special or creative financing adjustments can be made to the comparable property by comparisons to financing terms offered by a third party institutional lender that is not already involved in the property or transaction. Any adjustment should not be calculated on a mechanical dollar for dollar cost of the financing or concession but the dollar amount of any adjustment should approximate the market's reaction to the financing or concessions based on the appraiser's judgment.

STATEMENT OF ASSUMPTIONS AND LIMITING CONDITIONS: The appraiser's certification in this report is subject to the following assumptions and limiting conditions:

- 1. The appraiser will not be responsible for matters of a legal nature that affect either the property being appraised or the title to it, except for information that he or she became aware of during the research involved in performing this appraisal. The appraiser assumes that the title is good and marketable and will not render any opinions about the title.
- 2. The appraiser has provided a sketch in this appraisal report to show the approximate dimensions of the improvements. The sketch is included only to assist the reader in visualizing the property and understanding the appraiser's determination of its size
- 3. The appraiser has examined the available flood maps that are provided by the Federal Emergency Management Agency (or other data sources) and has noted in this appraisal report whether any portion of the subject site is located in an identified Special Flood Hazard Area. Because the appraiser is not a surveyor, he or she makes no guarantees, express or implied, regarding this determination.
- 4. The appraiser will not give testimony or appear in court because he or she made an appraisal of the property in question, unless specific arrangements to do so have been made beforehand, or as otherwise required by law.
- 5. The appraiser has noted in this appraisal report any adverse conditions (such as needed repairs, deterioration, the presence of hazardous wastes, toxic substances, etc.) observed during the inspection of the subject property or that he or she became aware of during the research involved in performing the appraisal. Unless otherwise stated in this appraisal report, the appraiser has no knowledge of any hidden or unapparent physical deficiencies or adverse conditions of the property (such as, but not limited to, needed repairs, deterioration, the presence of hazardous wastes, toxic substances, adverse environmental conditions, etc.) that would make the property less valuable, and has assumed that there are no such conditions and makes no guarantees or warranties, express or implied. The appraiser will not be responsible for any such conditions that do exist or for any engineering or testing that might be required to discover whether such conditions exist. Because the appraiser is not an expert in the field of environmental hazards, this appraisal report must not be considered as an environmental assessment of the property.
- 6. The appraiser has based his or her appraisal report and valuation conclusion for an appraisal that is subject to satisfactory completion, repairs, or alterations on the assumption that the completion, repairs, or alterations of the subject property will be performed in a professional manner.

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APPRAISER'S CERTIFICATION: The Appraiser certifies and agrees that:

- 1. I have, at a minimum, developed and reported this appraisal in accordance with the scope of work requirements stated in this appraisal report.
- 2. I performed a complete visual inspection of the interior and exterior areas of the subject property. I reported the condition of the improvements in factual, specific terms. I identified and reported the physical deficiencies that could affect the livability, soundness, or structural integrity of the property.
- 3. I performed this appraisal in accordance with the requirements of the Uniform Standards of Professional Appraisal Practice that were adopted and promulgated by the Appraisal Standards Board of The Appraisal Foundation and that were in place at the time this appraisal report was prepared.
- 4. I developed my opinion of the market value of the real property that is the subject of this report based on the sales comparison approach to value. I have adequate comparable market data to develop a reliable sales comparison approach for this appraisal assignment. I further certify that I considered the cost and income approaches to value but did not develop them, unless otherwise indicated in this report.
- 5. I researched, verified, analyzed, and reported on any current agreement for sale for the subject property, any offering for sale of the subject property in the twelve months prior to the effective date of this appraisal, and the prior sales of the subject property for a minimum of three years prior to the effective date of this appraisal, unless otherwise indicated in this report.
- 6. I researched, verified, analyzed, and reported on the prior sales of the comparable sales for a minimum of one year prior to the date of sale of the comparable sale, unless otherwise indicated in this report.
- 7. I selected and used comparable sales that are locationally, physically, and functionally the most similar to the subject property.
- 8. I have not used comparable sales that were the result of combining a land sale with the contract purchase price of a home that has been built or will be built on the land.
- 9. I have reported adjustments to the comparable sales that reflect the market's reaction to the differences between the subject property and the comparable sales.
- 10. I verified, from a disinterested source, all information in this report that was provided by parties who have a financial interest in the sale or financing of the subject property.
- 11. I have knowledge and experience in appraising this type of property in this market area.
- 12. I am aware of, and have access to, the necessary and appropriate public and private data sources, such as multiple listing services, tax assessment records, public land records and other such data sources for the area in which the property is located.
- 13. I obtained the information, estimates, and opinions furnished by other parties and expressed in this appraisal report from reliable sources that I believe to be true and correct.
- 14. I have taken into consideration the factors that have an impact on value with respect to the subject neighborhood, subject property, and the proximity of the subject property to adverse influences in the development of my opinion of market value. I have noted in this appraisal report any adverse conditions (such as, but not limited to, needed repairs, deterioration, the presence of hazardous wastes, toxic substances, adverse environmental conditions, etc.) observed during the inspection of the subject property or that I became aware of during the research involved in performing this appraisal. I have considered these adverse conditions in my analysis of the property value, and have reported on the effect of the conditions on the value and marketability of the subject property.
- 15. I have not knowingly withheld any significant information from this appraisal report and, to the best of my knowledge, all statements and information in this appraisal report are true and correct.
- 16. I stated in this appraisal report my own personal, unbiased, and professional analysis, opinions, and conclusions, which are subject only to the assumptions and limiting conditions in this appraisal report.
- 17. I have no present or prospective interest in the property that is the subject of this report, and I have no present or prospective personal interest or bias with respect to the participants in the transaction. I did not base, either partially or completely, my analysis and/or opinion of market value in this appraisal report on the race, color, religion, sex, age, marital status, handicap, familial status, or national origin of either the prospective owners or occupants of the subject property or of the present owners or occupants of the properties in the vicinity of the subject property or on any other basis prohibited by law.
- 18. My employment and/or compensation for performing this appraisal or any future or anticipated appraisals was not conditioned on any agreement or understanding, written or otherwise, that I would report (or present analysis supporting) a predetermined specific value, a predetermined minimum value, a range or direction in value, a value that favors the cause of any party, or the attainment of a specific result or occurrence of a specific subsequent event (such as approval of a pending mortgage loan application).
- 19. I personally prepared all conclusions and opinions about the real estate that were set forth in this appraisal report. If I relied on significant real property appraisal assistance from any individual or individuals in the performance of this appraisal or the preparation of this appraisal report, I have named such individual(s) and disclosed the specific tasks performed in this appraisal report. I certify that any individual so named is qualified to perform the tasks. I have not authorized anyone to make a change to any item in this appraisal report; therefore, any change made to this appraisal is unauthorized and I will take no responsibility for it.
- 20. I identified the lender/client in this appraisal report who is the individual, organization, or agent for the organization that ordered and will receive this appraisal report.

- 21. The lender/client may disclose or distribute this appraisal report to: the borrower; another lender at the request of the borrower; the mortgagee or its successors and assigns; mortgage insurers; government sponsored enterprises; other secondary market participants; data collection or reporting services; professional appraisal organizations; any agency, or instrumentality of the United States; and any state, the District of Columbia, or other jurisdictions; without having to obtain the appraiser's or supervisory appraiser's (if applicable) consent. Such consent must be obtained before this appraisal report may be disclosed or distributed to any other party (including, but not limited to, the public through advertising, public relations, news, sales, or other media).
- I am aware that any disclosure or distribution of this appraisal report by me or the lender/client may be subject to certain laws and regulations. Further, I am also subject to the provisions of the Uniform Standards of Professional Appraisal Practice that pertain to disclosure or distribution by me.
- 23. The borrower, another lender at the request of the borrower, the mortgagee or its successors and assigns, mortgage insurers, government sponsored enterprises, and other secondary market participants may rely on this appraisal report as part of any mortgage finance transaction that involves any one or more of these parties.
- 24. If this appraisal report was transmitted as an "electronic record" containing my "electronic signature," as those terms are defined in applicable federal and/or state laws (excluding audio and video recordings), or a facsimile transmission of this appraisal report containing a copy or representation of my signature, the appraisal report shall be as effective, enforceable and valid as if a paper version of this appraisal report were delivered containing my original hand written signature.
- 25. Any intentional or negligent misrepresentation(s) contained in this appraisal report may result in civil liability and/or criminal penalties including, but not limited to, fine or imprisonment or both under the provisions of Title 18, United States Code, Section 1001, et seq., or similar state laws.

SUPERVISORY APPRAISER'S CERTIFICATION: The Supervisory Appraiser certifies and agrees that:

- 1. I directly supervised the appraiser for this appraisal assignment, have read the appraisal report, and agree with the appraiser's analysis, opinions, statements, conclusions, and the appraiser's certification.
- 2. I accept full responsibility for the contents of this appraisal report including, but not limited to, the appraiser's analysis, opinions, statements, conclusions, and the appraiser's certification.
- 3. The appraiser identified in this appraisal report is either a sub-contractor or an employee of the supervisory appraiser (or the appraisal firm), is qualified to perform this appraisal, and is acceptable to perform this appraisal under the applicable state law.
- 4. This appraisal report complies with the Uniform Standards of Professional Appraisal Practice that were adopted and promulgated by the Appraisal Standards Board of The Appraisal Foundation and that were in place at the time this appraisal report was prepared.
- 5. If this appraisal report was transmitted as an "electronic record" containing my "electronic signature," as those terms are defined in applicable federal and/or state laws (excluding audio and video recordings), or a facsimile transmission of this appraisal report containing a copy or representation of my signature, the appraisal report shall be as effective, enforceable and valid as if a paper version of this appraisal report were delivered containing my original hand written signature.

APPRAISER Indianal Application	SUPERVISORY APPRAISER (ONLY IF REQUIRED)
Signature Signature	Signature
Name Stephanie A Gaffney	Name
Company Name Marshall Properties LLC	Company Name
Company Address <u>57 Hawthorne Drive</u>	Company Address
Monroe, CT 06468	
Telephone Number <u>203-209-9998</u>	Telephone Number
Email Address <u>MarshallPropertiesLLC@aol.com</u>	Email Address
Date of Signature and Report 09/08/2020	Date of Signature
Effective Date of Appraisal 09/04/2020	State Certification #
State Certification # RCR.0000204	or State License #
or State License #	State
or Other (describe) State #	Expiration Date of Certification or License
State CT	
Expiration Date of Certification or License 04/30/2021	SUBJECT PROPERTY
ADDRESS OF PROPERTY APPRAISED	☐ Did not inspect subject property
350 Quincy St # 2	☐ Did inspect exterior of subject property from street
Fairfield, CT 06824	Date of Inspection
APPRAISED VALUE OF SUBJECT PROPERTY \$ 298,000	☐ Did inspect interior and exterior of subject property
LENDER/CLIENT	Date of Inspection
Name No AMC	COMPARABLE ON FO
Company Name Town of Fairfield	COMPARABLE SALES
Company Address 611 Old Post Rd. Fairfield, CT 06824	Did not inspect exterior of comparable sales from street
	Did inspect exterior of comparable sales from street
Email Address	Date of Inspection

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Sunnlemental Addendum

		Supplementa	l Addendum		File	No. 350 Qu	incy2	
Borrower	Owner: Headly							
Property Address	350 Quincy St # 2							
City	Fairfield	County	Fairfield	State	CT	Zip Code	06824	
Lender/Client	Town of Fairfield							

#### Scope of Appraisal:

Information in this report was obtained from an interior and exterior inspection of the subject property, the local Tax Assessor's Office and City/Town Clerk's Offices. The appraiser researched and analyzed additional information from Real Estate Brokers regarding active listings and closed sales, particularly in the subject neighborhood. Facts relating to the subject site were gathered from the City/Town Hall, as well as a physical exterior inspection. Comparable Sales utilized in this report were verified through the local Multiple Listing Service, public land records and an exterior inspection of the sales. Recent, closed sales and listings were researched when preparing this report.

Due to the circumstances surrounding the Covid-19 outbreak, the Town of Fairfield is closed to the public. Records are available online (which may or may not be up to date) and via email from the Town Assessor's office. This has certain limitations regarding the appraiser's ability to verify said records accuracy. The appraiser reserves the right to amend the appraisal should be discovered and/or provided in the future.

#### **Purpose:**

The purpose of the appraisal is to estimate current market value for mortgage purposes.

This is an Appraisal Report which is intended to comply with the reporting requirements set forth under the Uniform Standards of Professional Appraisal Practice for an Appraisal Report. As such, it represents only summary discussions of data, reasoning, and analyses that were used in the appraisal process to develop the appraisers opinion of value. Supporting documentation that is not provided with the report concerning the data, reasoning and analyses is retained in the appraisers file. The depth of the discussion contained in this report is specific to the needs of the client as stated in the report. The appraiser is not responsible for unauthorized use of this report. To develop the opinion of value, the appraiser performed a complete appraisal process, as defined by the Uniform Standards of Professional Practice. This means that no departures from Standard 1 were invoked.

This appraisal is NOT a home inspection and the appraiser is not acting as a home inspector when preparing the report. The borrower has the right to have the home inspected by a professional home inspector. When performing the inspection of this property, the appraiser visually observed areas that were readily accessible. The appraiser is NOT required to disturb or move anything that obstructs access or visibility. When completing the appraisal, a visual inspection was done in accordance with appraisal guidelines. The inspection is NOT technically exhaustive. The inspection does NOT offer warranties or guarantees of any kind.

The photographs and signatures within this report are digital. The photographs and signature have not been altered in any way, with the possible exception of "blurring" personal photographs located within the subject dwelling.

#### Intended User/Use:

The intended user of this appraisal report is the lender/client. The intended use is to evaluate the property that is the subject of this appraisal for a mortgage finance transaction, subject to the stated scope of work, purpose of the appraisal, reporting requirements of this appraisal report form, and definition of market value. No additional intended users are identified by the appraiser.

The global outbreak of a "novel coronavirus" known as COVID-19 was officially declared a pandemic by the World Health Organization (WHO). The reader is cautioned, and reminded that the conclusions presented in this appraisal report apply only as of the effective date(s) indicated. The appraiser makes no representation as to the effect on the subject property of any unforeseen event, subsequent to the effective date of the appraisal.

The subject town of Fairfield Assessor and Town Clerk records are available online. The appraiser has compared and contrasted the online public information and the MLS listing information in order to establish if there are any severe/significant inconsistencies which would effect the credibility of the appraisal results. Having said this, the appraiser can not be responsible for mis information in the online records and/or information which may not be up to date.

#### • URAR: Sales Comparison Analysis - Summary of Sales Comparison Approach

Lack of recent similar sales required the use of two sales exceeding 6 months title pass for the sake of comparison. All three sales are within a 1 mile radius of the subject property. GLA was adjusted at \$50.00 per sf; bathrooms are adjusted at \$8,000 per full bath and \$5,000 per half bath. Garage bays are adjusted at \$6,000 per bay; Central AC is adjusted at \$6,000 lump sum; porches, patios and decks are similar in value (\$3,000). Enclosed porches add more value (\$6,000). The subject's large patio

		Supplemental	Addendum		File	e No. 350 Quincy2	
Borrower	Owner: Headly						
Property Address	350 Quincy St # 2						
City	Fairfield	County	Fairfield	State	CT	Zip Code 06824	
Lender/Client	Town of Fairfield						

required a \$6,000 adjustment as compared to typical sized porches, decks and patios. Condition adjustments are based on MLS listing comments (and photographs when available) with regard to upgrades/remodeling or the lack thereof. All adjustments are derived from the local market and tempered with the appraiser's knowledge and experience. This report was updated from a previous appraisal report dated 05/26/2020. The past few months in Fairfield County in general, and the Town of Fairfield, have experienced an increased interest in properties from buyers wanting to relocate from New York City. This appears to be due to the Covid-19 pandemic and the inherent risks of city life during a pandemic. Obviously, cities are more populated and public transportation is the norm. Crowded city streets and public transportation pose an increased risk of contracting the virus, as compared to a suburban area. Therefore, the suburban areas have seen an increase in buyers and a shortage of properties. This has caused numerous available properties to be bid up by 5-10%, and more, over asking/list price. The appraiser has amended the original appraisal on this property to reflect this increase in interest and increase in prices.

## **Subject Photo Page**

Borrower	Owner: Headly							
Property Address	350 Quincy St # 2							
City	Fairfield	County	Fairfield	State	CT	Zip Code	06824	
Lender/Client	Town of Fairfield							



## **Subject Front**

350 Quincy St # 2

Sales Price

Gross Living Area 1,196 Total Rooms 6 Total Bedrooms Total Bathrooms 1.0 Location N;Res; View N;Res; 9148 sf Site Quality Q4 Age 63



## **Subject Rear**



## **Subject Street**

Borrower	Owner: Headly			
Property Address	350 Quincy St # 2			
City	Fairfield	County Fairfield	State CT	Zip Code 06824
Lender/Client	Town of Fairfield			





Carport

**Outdoor fireplace** 





Rear of dwelling

**Rear of dwelling** 





Outdoor bar Patio

Borrower	Owner: Headly			
Property Address	350 Quincy St # 2			
City	Fairfield	County Fairfield	State CT	Zip Code 06824
Lender/Client	Town of Fairfield			





Patio with fireplace

Shed





Living room

Dining area





Kitchen Kitchen

Borrower	Owner: Headly			
Property Address	350 Quincy St # 2			
City	Fairfield	County Fairfield	State CT	Zip Code 06824
Lender/Client	Town of Fairfield			















Bedroom Bedroom

Borrower	Owner: Headly			
Property Address	350 Quincy St # 2			
City	Fairfield	County Fairfield	State CT	Zip Code 06824
Lender/Client	Town of Fairfield			





Full bathroom Tub/Shower

### **Comparable Photo Page**

Borrower	Owner: Headly							
Property Address	350 Quincy St # 2							
City	Fairfield	Count	y Fairfield	State	CT	Zip Code	06824	
Lender/Client	Town of Fairfield							



## **Comparable 1**

42 Jarvis Ct

0.06 miles SE Prox. to Subject Sale Price 280,000 Gross Living Area 1,196 **Total Rooms** 6 Total Bedrooms 3 Total Bathrooms 1.0 Location N;Res; N;Res; View Site 7841 sf Quality Q4 63 Age



#### Comparable 2

16 Jarvis Ct

Prox. to Subject 0.03 miles SE Sale Price 280,000 Gross Living Area 1,196 Total Rooms 6 Total Bedrooms 3 Total Bathrooms 1.0 Location N;Res; View N;Res; Site 4792 sf Quality Q4 Age 63



## Comparable 3

117 Granville St

0.84 miles NW Prox. to Subject Sale Price 257,000 Gross Living Area 1,276 Total Rooms 5 Total Bedrooms 3 **Total Bathrooms** 1.1 Location N;Res; View N;Res; Site 9148 sf Quality Q4 Age 27

## Vision Government Solutions

Page 1 of 3

## 350 QUINCY STREET

Location 350 QUINCY STREET

Mblu 183/116/E//

Acct# 22315

Owner HEADLY LISA

Assessment \$151,340

Appraisal \$216,200

PID 103792

Building Count 1

#### **Current Value**

	Appraisal		
Valuation Year	Improvements	Land	Total
2017	\$57,200	\$159,000	\$216,200
	Assessment		
Valuation Year	Improvements	Land	Total
2017	\$40,040	\$111,300	\$151,340

#### Owner of Record

Owner

HEADLY LISA

Sale Price

\$269,625

Co-Owner

Address 350 QUINCY STREET

Certificate

Book & Page 4894/0173

FAIRFIELD, CT 06824-6635

Sale Date 11/16/2012

**Building Photo** 

Instrument 15

#### Ownership History

Ownership History					
Owner	Sale Price	Certificate	Book & Page	Instrument	Sale Date
HEADLY LISA	\$269,625		4894/0173	15	11/16/2012
KYLE JAMES BRIAN & JAMIE B (SV)	\$245,000		3578/0213	15	07/29/2005
FAIRFIELD TOWN OF	\$6,700,000		3426/0336	15	12/21/2004

#### **Building Information**

## Building 1 : Section 1

Year Built:

1957

\$76,260

Replacement Cost: \$76.26 Building Percent Good: 75

Replacement Cost

\$57,200

Less Depreciation:

**Building Attributes** 

https://gis.vgsi.com/fairfieldct/Parcel.aspx?Pid=103792

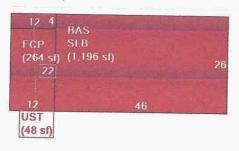
6/2/2020

Field	Description
Style	Ranch
Stories:	1 Story
Occupancy	1
Exterior Wall 1	Vinyl Siding
Exterior Wall 2	
Roof Structure:	Gable/Hip
Roof Cover	Asphalt
Interior Wall 1	Drywali
Interior Wall 2	
Interior Flr 1	Carpet
Interior Flr 2	
Heat Fuel	Oil
Heat Type:	Forced Air-Duc
AC Type:	None
Total Bedrooms:	3 Bedrooms
Total Bthrms:	1
Total Half Baths:	0
Total Xtra Fixtrs:	
Total Rooms:	6
Bath Style:	Average
Kitchen Style:	Average
Num Kitchens	01
CPZ	
Jsrfld 103	
Jsrfld 104	
Jsrfld 105	
Jsrfld 106	
Jsrfld 107	
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srfld 300	
srfld 301	



(http://images.vgsi.com/photos2/FairfieldCTPhotos/\02\03\32\93.jpg)

## **Building Layout**



(ParcelSketch.ashx?pid=103792&bid=22607)

	Building Sub-Areas	(sq ft)	
Code	Description	Gross Area	Living Area
BAS	First Floor	1,196	1,196
FCP	Carport	264	0
SLB	Slab	1,196	0
UST	Utility Storage, Unfinished	48	0
		2,704	1,196

#### Extra Features

	Extra Features	
	No Data for Extra Features	

 $https://gis.vgsi.com/fairfieldct/Parcel.aspx?Pid{=}103792$ 

6/2/2020

#### Land

Land Use

Use Code Description

Zone

Single Fam MDL-01

В

Neighborhood 0065 Alt Land Appr No Category

**Land Line Valuation** 

Size (Acres)

0.21

Depth

Assessed Value \$111,300

Appraised Value \$159,000

#### Outbuildings

Outbuildings

Legend

No Data for Outbuildings

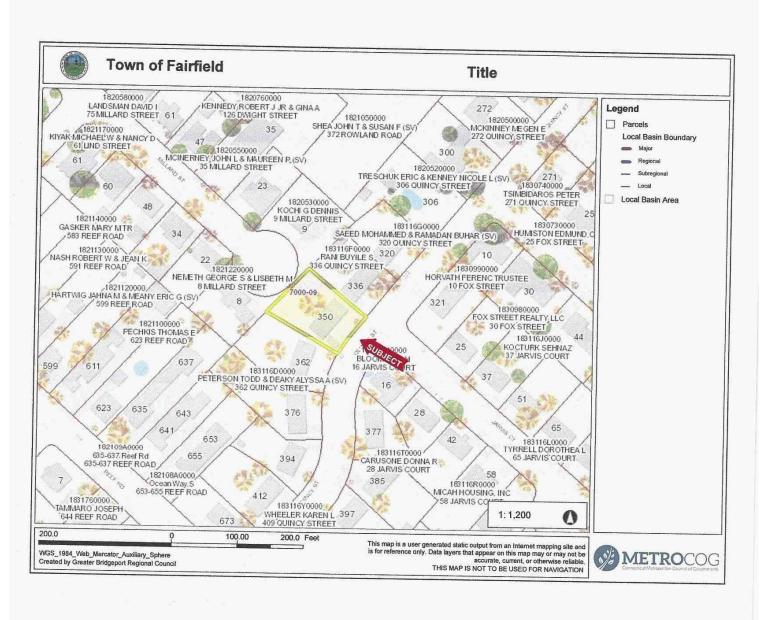
## Valuation History

Appraisal					
Valuation Year	Improvements	Land	Total		
2019	\$57,200	\$159,000	\$216,200		
2018	\$57,200	\$159,000	\$216,200		
2017	\$57,200	\$159,000	\$216,200		

Assessment					
Valuation Year	Improvements	Land	Total		
2019	\$40,040	\$111,300	\$151,340		
2018	\$40,040	\$111,300	\$151,340		
2017	\$40,040	\$111,300	\$151,340		

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#### Site Map



## VOL 356 | PAL 42

## DECLARATION OF COVENANTS, CONDITIONS AND RESTRICTIONS

This Declaration, made on July 8, 2005 by the Town of Fairfield, hereinafter referred to as Declarant.

#### WITNESSETH:

WHEREAS, The Declarant is the Owner of certain property in the Town of Fairfield, consisting of 20 lots more fully described on Exhibit A attached hereto (the "Properties"; each individual lot, the "Property"); and

WHEREAS, the acquisition of the Properties was approved by the Board of Selectman, the Board of Finance and the Representative Town Meeting on the condition that the Properties would be used to provide affordable Owner-occupied housing for low and moderate income households (as hereinafter defined);

NOW, THEREFORE, Declarant hereby declares that all of the Properties shall be held, sold and conveyed to the Owners thereof (collectively, the "Owners") subject to the following easements, restrictions, covenants and conditions which are to further the purpose of maintaining the Properties as affordable Owner-occupied housing for low and moderate income households and which shall run with the real property and be binding on all parties having any right, title or interest to the Properties or any part thereof, their heirs, successors and assigns and shall inure to the benefit of each owner ( the "Owner" regardless of the number of persons who are titleholders) thereof.

#### 1. USE AND OCCUPANCY

## 1.1 RESIDENTIAL USE ONLY

The Property shall be used for residential purposes only and shall not be used for any commercial purpose, regardless of the fact that such purpose may be permitted under the Fairfield Zoning regulations.

### 1.2 OCCUPANCY

The Owner must occupy the Property as the Owner's principal residence. The Owner may not lease the Property or any portion of the Property to any other person, nor take in boarders or paying guests. Violation of this covenant shall give Declarant a right to repurchase the Property from Owner at Owner's Original Purchase Price, as defined below, without any adjustment, provided that the price will not be lower than the amount due to Owner's first mortgagee at the time of repurchase.

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### 1.3 PERMITTED CAPITAL IMPROVEMENTS

The Owner shall make no improvements which are not Permitted Capital Improvements to the Property. For purposes of this Declaration, Permitted Capital Improvements means permanent, fixed and non-cosmetic improvements to the Property which have been made with the prior written approval of the Declarant and which are undertaken with all necessary permits and approvals having been obtained prior to construction. The amount attributable to such improvements must be demonstrated by the Owner through documentation verifiable by the Declarant. The cost of Permitted Capital Improvements may not exceed 10% of the Original Purchase price of the Property during the first five years of Ownership. For each five year period of Ownership thereafter the Owner is entitled to a new allowance for Permitted Capital Improvements equal to 10% of the Original Purchase Price. Permitted Capital Improvement allowances expire to the extent not used during a five year period at the end of that period. Landscaping and other ordinary maintenance and repair may be undertaken by the Owner and shall not constitute Permitted Capital Improvements.

#### 2. RESTRICTIONS ON RESALE

- 2.1 TRANSFER TO LOW OR MODERATE INCOME HOUSEHOLDS: Upon compliance with the provisions of 2.3 and 2.5, Owner may only sell, transfer, or otherwise dispose of the Property to a person or persons who are members of a low or moderate income household, as defined herein. Owner shall not, in any event, make such sale, transfer or other disposition directly to any other person or entity without following the procedure set forth below, except in the case of a sale, transfer or other disposition to a Permitted Mortgagee in lieu of foreclosure.
- 2.2 DEFINITION OF LOW AND MODERATE INCOME HOUSEHOLDS: low and moderate income households shall mean households consisting of two or more persons whose combined adjusted gross income is no more than 80% of the Area Median Income ("AMI") as published by the United States Department of Housing and Urban Development ("HUD") or such other criteria for low and moderate income households as may be established by Declarant from time to time. The final determination of whether a particular household is a low or moderate income household will be made by the Declarant.
- 2.3 NOTICE TO DECLARANT: Except in the case of a sale, transfer or other disposition to a Permitted Mortgagee in lieu of foreclosure, in the event the Owner contemplates sale, transfer or disposition of the Property to a third party, then:
  - (a) Owner shall give Declarant notice that such Property will be offered for sale to a low or moderate income household as defined in this document, which notice shall contain a detailed listing of the terms and conditions of such intended sale. Within thirty (30) days of Declarant's receipt of such notice, Declarant shall:

## VOL 35 1 MR 1 4 4

- (i) determine the Maximum Resale Price as defined below; and
- (ii) notify the Owner whether Declarant intends to exercise its right of first refusal; and
- (iii) if Declarant waives its right of first refusal, notify the Owner that such party is free to sell the Property on the open market (a) to any party who qualifies as a low or moderate income household as defined in this document, (b) at a price not to exceed the then applicable Maximum Resale Price; subject to all the terms and conditions of this document. If Declarant maintains a list of interested qualified low and moderate income households, Declarant may inform the persons on such list that a Property is for sale.
- 2.4 DECLARANT'S RIGHT OF FIRST REFUSAL: Upon notice in accordance with Section 2.3, Declarant shall have a right of first refusal to purchase Owner's Property at a price not to exceed the Maximum Resale Price.
- 2.5 WAIVER OF RIGHT OF FIRST REFUSAL: Declarant shall notify Owner of its waiver of its right of first refusal or its intention to purchase within thirty (30) days after receiving notice in accordance with Section 2.3, unless Declarant is unable to get a necessary approval from a Town body in which case the time for response will be extended until the body takes action, or its right will expire. If Declarant does not exercise its right of first refusal within 30 days or such additional time as it requires to obtain an approval, it must provide Owner with a certificate in recordable form stating that it has waived its right of first refusal. Such certificate shall be recorded at the same time as the deed to the subsequent Owner.

### 2.6 DETERMINATION OF MAXIMUM RESALE PRICE

Whenever Owner desires to sell the Property, Owner shall notify Declarant in accordance with Section 2.3, of this document. Upon receiving such notice, Declarant shall establish the Maximum Resale Price for the Property. The initial Maximum Resale Price shall be equal to the Owner's original purchase price ("Original Purchase Price") for the Property.

- (a) When the Property is sold, the Original Purchase Price shall be adjusted in the following manner:
  - (i) By calculating the increase in the Consumer Price Index for All Urban Consumers (CPI-U) for the New York, Northern New Jersey, Long Island metropolitan area for housing related items from the month and year of Owner's date of purchase of the Property to the month and year in which Owner gives notice of intent to sell, and by adding to that
  - The cost of Permitted Capital Improvements.

## VOL 3 6 | PARE | 45

- (b) Notwithstanding anything contained in this document, the Maximum Resale Price may never be reduced to an amount which is lower than (i) the Original Purchase Price or (ii) the amount of the first mortgage on the Property at the time of adjustment, whichever shall be higher.
- 2.7 TRANSFER TO OWNER'S HEIRS: If an Owner dies and there is a surviving co-Owner previously approved by Declarant, the co-Owner may take sole title to the property with no need to obtain approval from Declarant but must notify Declarant within thirty (30) days after the transfer. Upon receipt of notice from the executor of the decedent Owner's estate within ninety (90) days of the death of the Owner (or the last surviving co-Owner of the Property) Declarant shall agree to the transfer of the Property to Owner's heirs or specific devisee if such person or persons are not minors, and are qualified as a low or moderate income household as determined by the Declarant in accordance with Section 2.2 hereof. In addition such person or persons shall each make a written statement under oath and in recordable form that such person or persons will be bound by this document and will occupy the property as the person's or persons' principal residence. The Declarant shall have no right of first refusal and no new Maximum Resale Price shall be established. In the event that there is no qualified heir or specific devisee or that no qualified heir or specific devisee is willing or able to make the sworn statement just prescribed, the Maximum Resale Price shall be determined by Declarant and the Property shall be sold for the benefit of the Owner's estate under the same terms and conditions as other sales.
- 2.8 TRANSFER TO A CO-OWNER BY GIFT OR SALE: In the event that one co-Owner wishes to transfer the Property to another previously approved co-Owner by gift, the co-Owner may take sole title to the property with no need to obtain approval from Declarant but must notify Declarant within thirty (30) days after the transfer. The Declarant shall have no right of first refusal and no new Maximum Resale Price shall be established. In the event that the co-Owner wishes to transfer the property to another previously approved co-Owner by sale, The selling co-Owner will give notice to Declarant as provided in Section 2.3 and Declarant will determine the Maximum Resale Price. The Declarant shall have no right of first refusal. The selling co-Owner shall give the Declarant notice of the actual sale price which will become the new Maximum Resale Price.
- 2.9 WAIVER OF RESALE AND OCCUPANCY RESTRICTIONS IN THE CASE OF FORECLOSURE: Notwithstanding any provision in this document to the contrary, Article 2 and Article 1, Section 1.2 shall terminate and have no further force and effect upon the occurrence of one of the following events until the Property is resold at which time all requirements of these Declarations shall again be applicable:
  - (a) Title to Owner's Property and Equity of Redemption is acquired by a Holder of a Permitted Mortgage, HUD, or another party upon foreclosure of a mortgage insured by HUD, or by any other mortgage insurer.

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- (b) Title to Owner's Property and Equity of Redemption is acquired by a Holder of a Permitted Mortgage or HUD by deed or assignment in lieu of foreclosure of a HUD insured mortgage, or a mortgage insured by any other mortgage insurer.
- (c) A mortgage insured by HUD or any other mortgage insurer is assigned to HUD.

WITNESS:

TOWN OF FAIRFIELD, DECLARANT

Suzannu Politichi

By: Kenneth A. Flatto, First Selectman

Jennifer S. Carpenter Jennifer S. Carpenter

STATE OF CONNECTICUT)

ss: Town of Fairfield

COUNTY OF FAIRFIELD

On this 8th day of July, 2005, before me, the undersigned officer, personally appeared KENNETH A. FLATTO, the First Selectman of the Town of Fairfield, known to me or satisfactorily proven to be the person whose name is subscribed to the within instrument and acknowledged that he executed the same for the purposes therein contained as his free act and deed and the free act and deed of said Town.

Notary Public

SUZANNE GODLESKI NOTARY PUBLIC My Commission Expires Nov. 30, 2004

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#### Schedule A

6 p. 1. 5 2.

All that certain piece or parcel of land together with the improvements thereon located in the Town and County of Fairfield and State of Connecticut being shown and depicted as Lots 2-14 and Lots 21-27 on a certain Map entitled "Subdivision Map Prepared for Town of Fairfield Reef Road Fairfield, Connecticut" prepared by the Huntington Company, LLC dated March 14, 2005 and filed on the land records of the Town of Fairfield as Map No. 7075.

RECEIVED FOR RECORD

JUL - 8 2005

ST: Theranist

#### Tax Property Agent - Full Public Record

m Public Record **Public Records & Tax Report** 350 Quincy St, Fairfield, CT 06824-6635 County: Fairfield Parcel Number: 2487310 Assessor's APN: 183 116 E Census Block: 4003 Census Tract: 061500 Carrier Route: C004 Zoning: Latitude: 41.134585 Longitude: -73.249785 Property Use Type: Single Family / 1 Family Residence - Current Ownership Information -Owner(s): How Related: Lisa Headly Owner's Address: 350 Quincy St, Fairfield, CT 06824-6635 Owner Occupied: Transaction Details
Type of Sale: Recorded: Vol: 4894, Page: 176 Closing Date: Type of Deed: 11/16/2012 Sale Price: \$269,625 Nominal Sale: No Warranty Arms Length Sale: Coools

Most Recent Tax & Assessment Information Tax Amount: \$4,054.00 Base Mil Rate: 26.790

Assessed Land Value: \$111,300 N/A 26.790 Assessed Building Value: Total Assessed Value: Tax Dist. Mil Rate: \$40,040 \$151,340 Tax Year: July 2019-June 2020 Total Mil Rate: Fiscal Year: 2019 Municipal Tax District: Date of Last Update: 04/20/20

- Property Characteristics Lot & Exterior Lot Size in Acres: 0.21 Lot Size in Sq Ft: 9,249 Common Ownership %: Type of Parking: # of Parking Spaces: General Construction: # of Buildings: Type of Construction: 1 Building Style: Building Condition: Type of Roof: Ranch Year Built: 1957 Last Major Renovation: Roofing Material: Heating Fuel: Average Exterior Covering: Type of Basement: Vinyl Siding Gable Shngls&Asphalt Heating System: Forced Air Building Size Information Gross Building Sq Ft: 1,508 # of Units: First Floor Sq Ft: Unfinished Bsmt Sq Ft: Unit is on Floor #: Living Area in Sq Ft: 1,196 Attic Area in Sq Ft: # of Floors: # of Full Baths: Basement Area in Sq Ft: # of Rooms: # of Half Baths: # of Bedrooms:

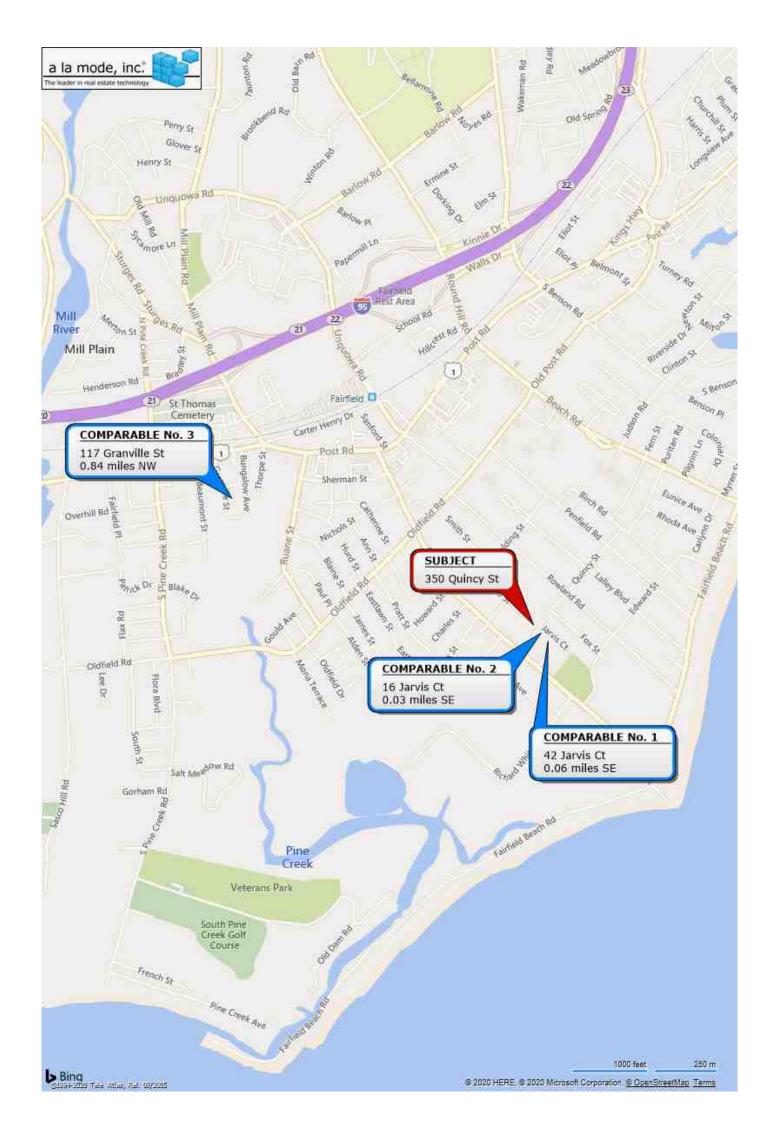
NOTICE: The public records information contained herein is provided AS IS, without any warranty or guarantee as to its accuracy. Neither the data provided nor the SMARTMLS, Inc. shall be liable for the accuracy or utilization of such data. This report was generated on 06/02/2020 10:36:16 AM

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https://smartmls.mlsmatrix.com/Matrix/Printing/PrintOptions.aspx?c=AAEAAAD\*\*\*\*\*AQ... 6/2/2020

#### **Location Map**

Borrower	Owner: Headly			
Property Address	350 Quincy St # 2			
City	Fairfield	County Fairfield	State CT	Zip Code 06824
Lender/Client	Town of Fairfield			



File No. 350 Quincy2

#### UNIFORM APPRAISAL DATASET (UAD) DEFINITIONS ADDENDUM

(Source: Fannie Mae UAD Appendix D: UAD Field-Specific Standardization Requirements)

#### Condition Ratings and Definitions

C1

The improvements have been recently constructed and have not been previously occupied. The entire structure and all components are new and the dwelling features no physical depreciation.

Note: Newly constructed improvements that feature recycled or previously used materials and/or components can be considered new dwellings provided that the dwelling is placed on a 100 percent new foundation and the recycled materials and the recycled components have been rehabilitated/remanufactured into like-new condition. Improvements that have not been previously occupied are not considered "new" if they have any significant physical depreciation (that is, newly constructed dwellings that have been vacant for an extended period of time without adequate maintenance or upkeep).

C2

The improvements feature no deferred maintenance, little or no physical depreciation, and require no repairs. Virtually all building components are new or have been recently repaired, refinished, or rehabilitated. All outdated components and finishes have been updated and/or replaced with components that meet current standards. Dwellings in this category are either almost new or have been recently completely renovated and are similar in condition to new construction.

Note: The improvements represent a relatively new property that is well maintained with no deferred maintenance and little or no physical depreciation, or an older property that has been recently completely renovated.

C3

The improvements are well maintained and feature limited physical depreciation due to normal wear and tear. Some components, but not every major building component, may be updated or recently rehabilitated. The structure has been well maintained.

Note: The improvement is in its first-cycle of replacing short-lived building components (appliances, floor coverings, HVAC, etc.) and is being well maintained. Its estimated effective age is less than its actual age. It also may reflect a property in which the majority of short-lived building components have been replaced but not to the level of a complete renovation.

C4

The improvements feature some minor deferred maintenance and physical deterioration due to normal wear and tear. The dwelling has been adequately maintained and requires only minimal repairs to building components/mechanical systems and cosmetic repairs. All major building components have been adequately maintained and are functionally adequate.

Note: The estimated effective age may be close to or equal to its actual age. It reflects a property in which some of the short-lived building components have been replaced, and some short-lived building components are at or near the end of their physical life expectancy; however, they still function adequately. Most minor repairs have been addressed on an ongoing basis resulting in an adequately maintained property.

C5

The improvements feature obvious deferred maintenance and are in need of some significant repairs. Some building components need repairs, rehabilitation, or updating. The functional utility and overall livability is somewhat diminished due to condition, but the dwelling remains useable and functional as a residence.

Note: Some significant repairs are needed to the improvements due to the lack of adequate maintenance. It reflects a property in which many of its short-lived building components are at the end of or have exceeded their physical life expectancy but remain functional.

C6

The improvements have substantial damage or deferred maintenance with deficiencies or defects that are severe enough to affect the safety, soundness, or structural integrity of the improvements. The improvements are in need of substantial repairs and rehabilitation, including many or most major components.

Note: Substantial repairs are needed to the improvements due to the lack of adequate maintenance or property damage. It reflects a property with conditions severe enough to affect the safety, soundness, or structural integrity of the improvements.

#### **Quality Ratings and Definitions**

Q1

Dwellings with this quality rating are usually unique structures that are individually designed by an architect for a specified user. Such residences typically are constructed from detailed architectural plans and specifications and feature an exceptionally high level of workmanship and exceptionally high-grade materials throughout the interior and exterior of the structure. The design features exceptionally high-quality exterior refinements and ornamentation, and exceptionally high-quality interior refinements. The workmanship, materials, and finishes throughout the dwelling are of exceptionally high quality.

Q2

Dwellings with this quality rating are often custom designed for construction on an individual property owner's site. However, dwellings in this quality grade are also found in high-quality tract developments featuring residence constructed from individual plans or from highly modified or upgraded plans. The design features detailed, high quality exterior ornamentation, high-quality interior refinements, and detail. The workmanship, materials, and finishes throughout the dwelling are generally of high or very high quality.

#### UNIFORM APPRAISAL DATASET (UAD) DEFINITIONS ADDENDUM

(Source: Fannie Mae UAD Appendix D: UAD Field-Specific Standardization Requirements)

#### Quality Ratings and Definitions (continued)

#### 0.3

Dwellings with this quality rating are residences of higher quality built from individual or readily available designer plans in above-standard residential tract developments or on an individual property owner's site. The design includes significant exterior ornamentation and interiors that are well finished. The workmanship exceeds acceptable standards and many materials and finishes throughout the dwelling have been upgraded from "stock" standards.

#### Q4

Dwellings with this quality rating meet or exceed the requirements of applicable building codes. Standard or modified standard building plans are utilized and the design includes adequate fenestration and some exterior ornamentation and interior refinements. Materials, workmanship, finish, and equipment are of stock or builder grade and may feature some upgrades.

#### 05

Dwellings with this quality rating feature economy of construction and basic functionality as main considerations. Such dwellings feature a plain design using readily available or basic floor plans featuring minimal fenestration and basic finishes with minimal exterior ornamentation and limited interior detail. These dwellings meet minimum building codes and are constructed with inexpensive, stock materials with limited refinements and upgrades.

#### $\Omega$ 6

Dwellings with this quality rating are of basic quality and lower cost; some may not be suitable for year-round occupancy. Such dwellings are often built with simple plans or without plans, often utilizing the lowest quality building materials. Such dwellings are often built or expanded by persons who are professionally unskilled or possess only minimal construction skills. Electrical, plumbing, and other mechanical systems and equipment may be minimal or non-existent. Older dwellings may feature one or more substandard or non-conforming additions to the original structure

#### Definitions of Not Updated, Updated, and Remodeled

#### Not Updated

Little or no updating or modernization. This description includes, but is not limited to, new homes.

Residential properties of fifteen years of age or less often reflect an original condition with no updating, if no major components have been replaced or updated. Those over fifteen years of age are also considered not updated if the appliances, fixtures, and finishes are predominantly dated. An area that is 'Not Updated' may still be well maintained and fully functional, and this rating does not necessarily imply deferred maintenance or physical/functional deterioration.

#### Updated

The area of the home has been modified to meet current market expectations. These modifications are limited in terms of both scope and cost.

An updated area of the home should have an improved look and feel, or functional utility. Changes that constitute updates include refurbishment and/or replacing components to meet existing market expectations. Updates do not include significant alterations to the existing structure.

#### Remodeled

Significant finish and/or structural changes have been made that increase utility and appeal through complete replacement and/or expansion.

A remodeled area reflects fundamental changes that include multiple alterations. These alterations may include some or all of the following: replacement of a major component (cabinet(s), bathtub, or bathroom tile), relocation of plumbing/gas fixtures/appliances, significant structural alterations (relocating walls, and/or the addition of) square footage). This would include a complete gutting and rebuild.

#### **Explanation of Bathroom Count**

Three-quarter baths are counted as a full bath in all cases. Quarter baths (baths that feature only a toilet) are not included in the bathroom count. The number of full and half baths is reported by separating the two values using a period, where the full bath count is represented to the left of the period and the half bath count is represented to the right of the period.

#### Example

3.2 indicates three full baths and two half baths.

## UNIFORM APPRAISAL DATASET (UAD) DEFINITIONS ADDENDUM (Source: Fannie Mae UAD Appendix D: UAD Field-Specific Standardization Requirements)

#### Abbreviations Used in Data Standardization Text

Abbreviation	Full Name	Fields Where This Abbreviation May Appear
ac	Acres	Area, Site
AdjPrk	Adjacent to Park	Location
AdjPwr	Adjacent to Power Lines	Location
A	Adverse	Location & View
ArmLth	Arms Length Sale	Sale or Financing Concessions
ba	Bathroom(s)	Basement & Finished Rooms Below Grade
br	Bedroom	Basement & Finished Rooms Below Grade
В	Beneficial	Location & View
Cash	Cash	Sale or Financing Concessions
CtySky	City View Skyline View	View
CtyStr	City Street View	View
Comm	Commercial Influence	Location
C	Contracted Date	Date of Sale/Time
Conv	Conventional	Sale or Financing Concessions
CrtOrd	Court Ordered Sale	Sale or Financing Concessions
DOM	Days On Market	Data Sources
e	Expiration Date	Date of Sale/Time
Estate	Estate Sale	Sale or Financing Concessions
FHA	Federal Housing Authority	Sale of Financing Concessions  Sale or Financing Concessions
GlfCse	Golf Course	Location
Glfvw	Golf Course View	View
Ind	Industrial	Location & View
-		Basement & Finished Rooms Below Grade
in	Interior Only Stairs	
Lndfl	Landfill	Location
LtdSght	Limited Sight	View
Listing	Listing	Sale or Financing Concessions
Mtn	Mountain View	View
N	Neutral	Location & View
NonArm	Non-Arms Length Sale	Sale or Financing Concessions
BsyRd	Busy Road	Location
0	Other	Basement & Finished Rooms Below Grade
Prk	Park View	View
Pstrl	Pastoral View	View
PwrLn	Power Lines	View
PubTrn	Public Transportation	Location
rr	Recreational (Rec) Room	Basement & Finished Rooms Below Grade
Relo	Relocation Sale	Sale or Financing Concessions
REO	REO Sale	Sale or Financing Concessions
Res	Residential	Location & View
RH	USDA - Rural Housing	Sale or Financing Concessions
S	Settlement Date	Date of Sale/Time
Short	Short Sale	Sale or Financing Concessions
sf	Square Feet	Area, Site, Basement
sqm	Square Meters	Area, Site
Unk	Unknown	Date of Sale/Time
VA	Veterans Administration	Sale or Financing Concessions
W	Withdrawn Date	Date of Sale/Time
WO	Walk Out Basement	Basement & Finished Rooms Below Grade
wu	Walk Up Basement	Basement & Finished Rooms Below Grade
WtrFr	Water Frontage	Location
Wtr	Water View	View
Woods	Woods View	View

#### Other Appraiser-Defined Abbreviations

Abbreviation	Full Name	Fields Where This Abbreviation May Appear

#### **USPAP ADDENDUM**

File No. 350 Quincy2 Borrower Owner: Headly Property Address 350 Quincy St # 2 City State CT Zip Code 06824 County Fairfield Fairfield I ender Town of Fairfield This report was prepared under the following USPAP reporting option: X Appraisal Report This report was prepared in accordance with USPAP Standards Rule 2-2(a). Restricted Appraisal Report This report was prepared in accordance with USPAP Standards Rule 2-2(b). Reasonable Exposure Time My opinion of a reasonable exposure time for the subject property at the market value stated in this report is: 30-90 days **Additional Certifications** I certify that, to the best of my knowledge and belief: I have NOT performed services, as an appraiser or in any other capacity, regarding the property that is the subject of this report within the three-year period immediately preceding acceptance of this assignment. I HAVE performed services, as an appraiser or in another capacity, regarding the property that is the subject of this report within the three-year period immediately preceding acceptance of this assignment. Those services are described in the comments below. - The statements of fact contained in this report are true and correct. - The reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions. - Unless otherwise indicated, I have no present or prospective interest in the property that is the subject of this report and no personal interest with respect to the parties - I have no bias with respect to the property that is the subject of this report or the parties involved with this assignment. - My engagement in this assignment was not contingent upon developing or reporting predetermined results. - My compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal. - My analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the Uniform Standards of Professional Appraisal Practice that were in effect at the time this report was prepared. - Unless otherwise indicated, I have made a personal inspection of the property that is the subject of this report. - Unless otherwise indicated, no one provided significant real property appraisal assistance to the person(s) signing this certification (if there are exceptions, the name of each individual providing significant real property appraisal assistance is stated elsewhere in this report). **Additional Comments** This certifies that the above referenced appraisal report was completed in compliance with the Appraiser Independence Requirements (AIR) and the USPAP standards. The undersigned appraiser(s) responsible of preparing the above referenced appraisal report hereby certify that the report was completed and the opinion of value developed in accordance with USPAP standards: and at no time did any employee, director, officer, or agent of the lender or any third party acting as joint venture partner, independent contractor, appraisal company, appraisal management company or partnering on behalf of the lender, influence or attempt to influence the development, reporting, result or review of the report. The appraiser further certifies, I am currently licensed and/or certified by the state in which the property appraised is located, and that there have been no sanctions against me for any reason that would impair my ability to perform appraisals. The undersigned certifies the appraisal report is in compliance with the Appraisal Independence provisions. The appraiser has performed services on this property for this client on 05/26/2020. This is considered anew assignment and a new appraisal report. All pertinent data has been updated accordingly. **SUPERVISORY APPRAISER: (only if required)** APPRAISER. Signature: Signature: Name: Stephanie A Gaffney Name: Date Signed: <u>09/08/2020</u> Date Signed: State Certification #: RCR.0000204 State Certification #: or State License #: or State License #: State: <u>CT</u> Expiration Date of Certification or License: 04/30/2021 Expiration Date of Certification or License: Effective Date of Appraisal: 09/04/2020 Supervisory Appraiser Inspection of Subject Property: Interior and Exterior Did Not Exterior-only from Street

#### Resale Calculation- Supplied by the Town of Fairfield

#### RESALE CALCULATION 350 QUINCY STREET SUBJECT TO VERIFICATION

350 Quincy Street

Address 350 Quincy
Owner Headly
Date of Purchase 11/16/2012
Purchase Price \$269,625
Sale Notice 4/1/2020

CPI-UC 11/12 CPI-UC 4/20

254.29 280.62

Change in CPI

26.34

% Change in CPI Unadjusted Max Resale

10.36% \$297,552

Value Homeowner Improvements:

Roof

\$4,900

Max Resale

\$302,452

Updated 5/26/2020

CPL-02 Rev 06/13

740660

#### STATE OF CONNECTICUT DEPARTMENT OF CONSUMER PROTECTION

450 Columbus Boulevard ♦ Hartford Connecticut 06103

Attached is your Real Estate Appraiser license. Such license shall be shown to any properly interested person on request and shall not be transferred to or used by any other person than the person to whom the license was issued. Please note, the address has been removed from the certificate, however, the Department of Consumer Protection must be notified of any name or address change. Changes and questions can be emailed to the License Services Division at dcp.licenseservices@ct.gov.

In an effort to be more efficient and Go Green, the department asks that you keep your email information with our office current to receive correspondence. You can access your account at www.elicense.ct.gov to verify, add or change your email address. Visit our web site to download applications, verify licensure and download rosters at www.ct.gov/dcp.

STEPHANIE GAFFNEY 57 HAWTHORNE DR MONROE, CT 06468

### STATE OF CONNECTICUT

CERTIFIED RESIDENTIAL REAL ESTATE

APPRAISER

STEPHANIE A GAFFNEY

License # RCR.0000204

Effective 05/01/2020

Expiration 04/30/2021

STATE OF CONNECTICUT + DEPARTMENT OF CONSUMER PROTECTION Be it known that

#### STEPHANIE A GAFFNEY

has been certified by the Department of Consumer Protection as a licensed

TO APPERA ON

CERTIFIED RESIDENTIAL REAL ESTATE APPRAISER

License # RCR.0000204

Effective: 05/01/2020

Expiration: 04/30/2021

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#### **MEMORANDUM**

To: RTM

Fr: H. James Haselkamp, Jr, Director of HR

Re: Voluntary Early Retirement Program (VERIP)

Dt: September 22, 2020

Cc: Brenda Kupchick, First Selectwoman

We are requesting funding and approval for the Agreements reached between the Town and AFSCME Local #1303-366 (PETA), UPSEU Local #454 (DPW) and UPSEU Local 222 (THEA) for a Voluntary Early Retirement Incentive Plan (VERIP). This VERIP is designed to ease the financial transition from full employment to retirement while providing the Town the benefit of advanced notification of the retirement intentions of such members, as well as give the Town greater flexibility in its desire to restructure and reorganize itself.

#### Background:

The Administration has an overarching objective to restructure and reorganize operations to provide greater efficiency and effectiveness. While the Pandemic delayed those efforts as the budget season approaches and department evaluations commence, the determination of the future staffing structures would likely have resulted in the need to eliminate positions. With that likelihood, there was a determination that the first step should be a voluntary process where staff who are currently eligible to retire are offered incentives to retire. This would create vacancies that will allow the operational flexibility to develop the new staffing structures.

Approximately a month ago, we approached the impacted unions to have discussions regarding this offering. We made an initial proposal and requested their feedback. As result of their input, the Town modified the proposal and it is reflected in the attached Agreements.

#### The Proposal:

First, the VERIP is limited to those employees who are currently eligible for a normal retirement or an early retirement in the THEA, PETA and DPW unions along with eligible non-union employees. Fifty five employees meet these eligibility requirements. Second, after feedback and analysis, it was determined that the incentive would be structured based on existing

features in the pension provisions and collective bargaining agreements. The challenge was to develop incentives that are sufficient to entice employees to retire but not too costly.

The program is structured where the incentives to those in the Normal Retirement group are different than those who are eligible for an Early Retirement. The three Agreements are substantially similar, with slight variations associated with differences in the union contracts.

#### Normal Retirement: (DPW Age 59.5 and 10 years) (THEA, PETA, NON, Age 62 and 10 years)

Those employees currently eligible for a normal retirement will receive additional service credits equivalent to a 6 percent adjustment to their pension calculation. In addition, in retirement they will have three years where they will not be required to make the retiree health care contributions.

#### Early Retirement: (DPW Age 55 and 15, THEA PETA and NON, Age 58 and 15)

Those who are eligible for an early retirement will receive retiree medical insurance with a required employee contribution. In addition, the Town will waive the early retirement penalties. Typically employees who retiree early are penalize 5/9 of 1% for each month they retire early. Therefore, an employee leaving one year early has their pension reduced by 6.66%. This program will waive that penalty.

#### Costs:

In the packet you will receive a financial analysis of the VERIP. In summary, there are direct costs associated with the pension enhancements, providing retiree health insurance and waiving health care contributions. There are also indirect costs associated with contractual benefits upon retirement.

#### **Direct Costs:**

Hooker and Holcombe, the Town's pension actuaries, conducted an analysis of these enhancements. (See attached) The impact on the actuarial determined employer contribution (ADEC) for FY 2021 is an increase of \$433,645, <u>assuming all eligible employees opt to take the package</u>. If fifty percent elect the VERIP, the impact is approximately \$216,882.

The incentive whereby early retirees are eligible for retiree medical insurance impacts the OPEB trust, as retiree medical costs are reflected in that fund. If all elect the package, the net increase in the liability for next FY, is approximately \$1,205,070 and if you assume 50% participation, the liability is approximately \$602,535.

Another provision related to the incentive is the waiver of retiree health care contributions for 3 years. This provision also affects the OPEB trust as contributions will not be made for the

three years. The three year impact is roughly \$141,466 or if 50% elect the package the liability is approximately \$70,733, or \$23,577 per year.

#### **Indirect Costs:**

The other major cost is the contractual obligation to payout vacation and accrued compensatory time. As part of these Agreements, the Town proposed that payments be split across two fiscal years, half in November 2020 and the other in July 2021. The liability for vacation payout is approximately \$697,320 and comp time is \$44,697, if everyone elected the package. If 50% elect, the cost is \$348,660 for vacation and \$22,349 for comp time with a payment of \$185,504 this fiscal year and the same for next fiscal year.

There are also associated costs related to replacing departing employees. New hires are not eligible for the pension plan but do participate in the Town's 401A plan. Assuming half of those eligible elect to retire and are replaced, the six month budget impact in this year is approximately \$41,629 and approximately \$83,000 in next fiscal year.

It is important to note these are the best estimates based on the data available, the ultimate determination of costs will relate to the number of people that elect the package, their salaries, health coverage and accrued time balances.

#### **Related Matters:**

In order to assist in the transition after retirement, these agreements permit retiring employees, at the Town's discretion, the ability to come back in a part time or temporary capacity. This will assist in the transition and reorganization efforts.

#### Conclusion:

We respectfully request the RTM approve the VERIP offering as we believe this is the most reasonable and fairest manner to achieve the restructuring and reorganization of Town government.

#### FINANCIAL ANALYSIS

Vacation	n Liability	
\$	140,184.00	Pro rata
\$	32,239.46	Non
\$	203,414.49	Thea
\$	141 <mark>,923</mark> .92	DPW
\$	179,558.91	Peta
\$	557,136.79	
\$	697,320.79	Total
\$	348,660.39	Per FY
\$	174,330.20	50% Elect
	Comp Time	
\$	<mark>44,697.47</mark>	
\$	22,348.74	Per FY
\$	11,174.37	50% Elect

		FY 2020/21					
New Hires 401A					6 months	27 Elect Offe	
	Peta	\$	56,331.95	\$	28,165.97	\$ 14,082.99	
	Thea		\$51,751	\$	25,875.50	\$ 12,937.75	
	DPW	\$	48,300.02	\$	24,150.01	\$ 12,075.00	
	Non	\$	10,134.79	\$	5,067.40	\$ 2,533.70	
		\$	166,517.76	\$	83,258.88	\$ 41,629.44	

 Pension

 Baseline ADEC
 \$404,003

 Proposal 6% No Reduction
 \$837,648

 Net Increase in ADEC 2021
 \$433,645

 50% Elect
 \$216,822.50

OPEB T	rust Impact	202	1
<u>Health</u>	Care		
Cost			
\$	62,218.00	Non	
\$	450,887.00		
\$	431,456.00		
\$	333,881.00		
\$	1,278,442.00	Total	
3	Contributions		
\$	31,056.00	DPW	
\$	19,765.00	THEA	
\$	22,551.00	Peta	
\$	73,372.00	Total	
\$	1,205,070.00	Net	Overall
\$	602,535.00	50% Elect	Additional Liability

```
Cost of Employee HC Waiver 3 Years

$26,793 Peta
$55,729 Thea
$48,227 DPW
$10,717 Non
$141,466 Three Years Total If All Elect
$70,733 50% Elect
$35,366.50 1 Year 50% Elect Reflects Contributions Not Made to OPEB Trust
$23,577.67 50% Elect Impact per Year
```

Town of Fairfield 2020 Early Retirement Incentive Analysis

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	Bass	Baseline	Scenario 4: No Multiplier, No Retirement Reduction	Scenario 4: No Multiplier, No Early Retirement Reduction	Scena	rio 5: No Multiplier, 50% of
	Early Retirement	Normal Retirement	Early Retirement	Normal Retirement	Early	Normal Retirement
Actuarial Accrued Liability Active Liability Inactive Liability	20,225,204	10,750,417	26,201,807	14,322,637	23,929,626	14,322,467
Market Value of Assets Actuarial Value of Assets	20,225,204	10,750,417	26,201,807	14,322,637	23,529,626	14,327/637
Change in Actuarial Accrued Liability			5,976,603	3,572,220	3,304,422	£,572,220
Gross Normal Cost Estimated employee contributions Estimated administrative expenses	325,116 (115,369)	263,295 (76,769)	K - K - S 40	ž i iš:		
City's normal cost Amortization of unfunded accrued liability	209,747	186,526	515,490	308,109	285,041	308,109
Contribution before adjustment as of the valuation date	209,747	186,526	515,490	308,109	The state of the s	308,109
Fiscal year ending Adjustment for interest Actuarially determined employer contribution	2022 3,578 213,325	2022 3,182 189,708	2022 8,793 524,283	2022 5,256 313,365	2022 4,862 289,873	2023 5,256 313,365
	の行序	\$ 8 9 5 0 H B	849LE8B	849	5/18%	
Retirement & Benefit Assumptions	No Change	No Change	Unreduced	6% unreduced	Reduced per month	6% unreduced
		434615		Increase	+ +	ADEC
		\$217307		20 1 Cleci	Č	

### Town of Fairfield

#### and

#### The United Public Service Employees Union Unit #222 (THEA)

The Town of Fairfield ("Town") and the United Public Service Employees Union ("Union") hereby agree to the following voluntary early retirement incentive plan ("VERIP") for eligible bargaining unit members, as defined herein. The Parties agree that this VERIP is designed to ease the financial transition from full employment to retirement while providing the Town the benefit of advanced notification of the retirement intentions of such members as well as allow the Town to reorganize and restructure.

#### **Eligibility Requirements:**

Any members of the union may avail himself/herself of the VERIP provided herein upon meeting the following eligibility requirements:

I. The applicant must be an active full time employee of the Town of Fairfield on the date of his/her application.

The applicant must be currently (as of November 1, 2020) eligible for a normal retirement or early retirement as summarized in the attached document.

The applicant must submit to the Director of Human, no later than 4:00 p.m. on October 15, 2020, a signed "Election and Retirement Notice," attached hereto. Resignation shall be irrevocable upon receipt by the Director of Human Resources.

#### Benefits:

Eligible members that voluntarily elect the VERIP as provided herein

#### A. Normal Retirement: age 62 and 10 (as of 11/8/2020)

- 1. Each eligible employee shall receive a pension adjustment equivalent to three years of service at 2% per year (Six (6%) percent pension adjustment to multiplier).
- 2. Each eligible employee age 65 or older retiring will not be required to make the employee health care contributions for three (3) years from the date of retirement, as currently required by contract. Employees under 65 shall, once they reach age 65, not be required to make employee/retiree health care contributions for three (3) years from the date of retirement, as currently required by contract.

#### B. Early Retirement: age 58 and 15 (As of 11/1/2020):

- 1. Each eligible employee shall have the actuarial reduction factors (early retirement penalties) for retirement waived and will receive an unreduced pension.
- 2. Employees shall be eligible for the retiree health care as outlined in the current contract and as may change from time to time.
- 3. Eligible employees shall contribute half the cost as active employees pay for health insurance until age 62, the percentage being frozen at time of retirement until they reach age 62. At age 65 and older, employees shall contribute the cost for health insurance as contained in the contract, expiring June 30, 2020.
- 4. Employees electing retire early shall have the option to elect survivorship options as outlined in pension plan document

#### **General Conditions:**

- 1. The window to elect the VERIP is October 6, 2020 October 15, 2020 (4 p.m).
- 2. The effective date of retirement will be November 1, 2020.
- 3. This VERIP is subject to approval of the RTM and is **not** subject to negotiations under the Municipal Employees Relations Act (MERA).
- 4. This plan and the benefits hereunder may be withdrawn and rejected by the Town if fewer than two (2) qualified members elect participation in the VERIP by October 15, 2020. However, the Town may waive the minimum number of participants in its sole discretion.
- 5. Any Town decision under this VERIP is final and is not subject to grievance or arbitration process.
- 6. Any employee electing the VERIP may leave earlier than the November 1, 2020 retirement with a minimum of two weeks' notice.
- 7. Notwithstanding any restriction to the contrary, employees/retirees may be reemployed in a part time or temporary status, in any capacity, provided they are working less than twenty (20) hours on average.
- 8. The VERIP is a one-time offer and may not be extended or implemented in future years unless the Town and the Union are in mutual agreement to reinstate such a plan. This plan shall not establish any precedent or be used to indicate a past practice by either party in the future. This plan does not in any way alter, add to or delete from the current collective bargaining agreement between parties, except as specifically stated herein for

- those qualified applicants who meet the eligibility criteria and elect participation in this plan.
- 9. Severance payments for vacation and compensatory time off, if applicable, shall be paid in two equal installments, one in November 2020 and the second in July 2021. The payout amount shall be determined by the union contract or past practice.

For Town	For Union
Dated:	Dated:

# TOWN OF FAIRFIELD VOLUNTARY EARLY RETIREMENT INCENTIVE PLAN ELECTION AND RETIREMENT NOTICE

#### **ELECTION FORM**

I,	hereby elect to parti	cipate in the Tov	n of Fairfield
Voluntary Early Retirement Incenti	ve Plan ("VERIP"). I u	understand that thi	s form must be
received by the Human Resources of			
terms of the VERIP, I understand that			
election to retire, effective Novembe	r 1, 2020 will be IRRE	VOCABLE.	
Signature			
Date			

## Town of Fairfield and Fairfield Professional and Technical Employees (PETA)

The Town of Fairfield ("Town") and the Fairfield Professional and Technical Employees Union ("Union") hereby agree to the following voluntary early retirement incentive plan ("VERIP") for eligible bargaining unit members, as defined herein. The Parties agree that this VERIP is designed to ease the financial transition from full employment to retirement while providing the Town the benefit of advanced notification of the retirement intentions of such members as well as allow the Town to reorganize and restructure.

#### **Eligibility Requirements:**

Any members of the union may avail himself/herself of the VERIP provided herein upon meeting the following eligibility requirements:

I. The applicant must be an active full time employee of the Town of Fairfield on the date of his/her application.

The applicant must be currently (as of November 1, 2020) eligible for a normal retirement or early retirement as summarized in the attached document.

The applicant must submit to the Director of Human, no later than 4:00 p.m. on October 15, 2020, a signed "Election and Retirement Notice," attached hereto. Resignation shall be irrevocable upon receipt by the Director of Human Resources.

#### **Benefits:**

Eligible members that voluntarily elect the VERIP as provided herein

#### A. Normal Retirement: age 62 and 10 (as of 11/1/2020)

- 1. Each eligible employee shall receive a pension adjustment equivalent to three years of service at 2% per year (Six (6%) percent pension adjustment to multiplier).
- 2. Each eligible employee age 65 or older will not be required to make the employee health care contributions for three (3) years from the date of retirement. Employees under 65 shall not be required to make employee/retiree health care contributions for three (3) years from the time they reach age 65.

#### B. Early Retirement: age 58 and 15 (As of 11/1/2020):

- 1. Each eligible employee shall have the actuarial reduction factors (early retirement penalties) for retirement waived and will receive an unreduced pension.
- 2. Eligible employees shall be eligible for the retiree health care as outlined in the current contract and as may change from time to time.
- 3. Eligible employees shall contribute half the cost as active employees pay or 8% for health insurance, the percentage being frozen at time of retirement until the retiree reaches age 65. At age 65 and older, employees shall contribute the cost for health insurance as contained in the union contract expiring June 30, 2020.
- 4. Employees electing retire early shall have the option to elect survivorship options as outlined in pension plan document

#### **General Conditions:**

- 1. The window to elect the VERIP is October 6, 2020 October 15, 2020 (4 p.m).
- 2. The effective date of retirement will be November 1, 2020.
- 3. This VERIP is subject to approval of the RTM and is **not** subject to negotiations under the Municipal Employees Relations Act (MERA).
- 4. This plan and the benefits hereunder may be withdrawn and rejected by the Town if fewer than two (2) qualified members elect participation in the VERIP by October 15, 2020. However, the Town may waive the minimum number of participants in its sole discretion.
- 5. Any Town decision under this VERIP is final and is not subject to the grievance or arbitration process.
- 6. Any employee electing the VERIP may leave earlier than the November 1, 2020 retirement with a minimum of two weeks' notice.
- 7. Notwithstanding any restriction to the contrary, employees/retirees may be reemployed in a part time or temporary status, in any capacity, provided they are working less than twenty (20) hours on average.
- 8. The VERIP is a one-time offer and may not be extended or implemented in future years unless the Town and the Union are in mutual agreement to reinstate such a plan. This plan shall not establish any precedent or be used to indicate a past practice by either party in the future. This plan does not in any way alter, add to or delete from the current collective bargaining agreement between parties, except as specifically stated herein for those qualified applicants who meet the eligibility criteria and elect participation in this

plan.

Severance payments for vacation and compensatory time off, if applicable, shall be paid
in two equal installments, one in November 2020 and the second in July 2021. The
payout amount shall be determined by the union contract or past practice.

For Town	For Union
Dated:	Dated:

#### TOWN OF FAIRFIELD VOLUNTARY EARLY RETIREMENT INCENTIVE PLAN ELECTION AND RETIREMENT NOTICE

#### **ELECTION FORM**

I,	hereby	elect to	particip	ate in the	e Town o	of Fairfield
Voluntary Early Retirement Incenti						
received by the Human Resources						
terms of the VERIP, I understand the						
election to retire, effective November						
Signature						
Date						

## Town of Fairfield and United Pubic Service Employees Union (DPW)

The Town of Fairfield ("Town") and the United Public Service Employees Union #454 ("DPW Union") hereby agree to the following voluntary early retirement incentive plan ("VERIP") for eligible bargaining unit members, as defined herein. The Parties agree that this VERIP is designed to ease the financial transition from full employment to retirement while providing the Town the benefit of advanced notification of the retirement intentions of such members as well as allow the Town to reorganize and restructure.

#### **Eligibility Requirements:**

Any members of the union may avail himself/herself of the VERIP provided herein upon meeting the following eligibility requirements:

I. The applicant must be an active full time employee of the Town of Fairfield on the date of his/her application.

The applicant must be currently (as of November 1, 2020) eligible for a normal retirement or early retirement as summarized in the attached document.

The applicant must submit to the Director of Human, no later than 4:00 p.m. on October 15, 2020, a signed "Election and Retirement Notice," attached hereto. Resignation shall be irrevocable upon receipt by the Director of Human Resources.

#### **Benefits:**

Eligible members that voluntarily elect the VERIP as provided herein

#### A. Normal Retirement: age 59.5 and 10 (as of 11/1/2020)

- 1. Each eligible employee shall receive a pension adjustment equivalent to three years of service at 2% per year (Six (6%) percent pension adjustment to multiplier).
- 2. For three years from retirement, employees will not be required to pay the employee/retiree cost share toward health care, thereafter retirees shall contribute as required by the union contract.

#### B. Early Retirement: age 55 and 15 (As of 11/1/2020):

- 1. Each eligible employee shall have the actuarial reduction factors (early retirement penalties) for retirement waived and will receive an unreduced pension.
- 2. Eligible employees shall be eligible for the retiree health care as outlined in the current contract and as may change from time to time.
- 3. Eligible employees shall contribute half the cost as current active employees pay toward healthcare or 7.5%, the percentage being frozen at time of retirement until they reach age 65. At age 65 or older, employees shall contribute the cost for health insurance as outlined in the union contract expiring June 30, 2020.
- 4. Employees electing retire early shall have the ability to elect survivorship options as outlined in pension plan document

#### **General Conditions:**

- 1. The window to elect the VERIP is October 6, 2020 October 15, 2020 (4 p.m).
- 2. The effective date of retirement will be November 1, 2020.
- 3. This VERIP is subject to approval of the RTM and is **not** subject to negotiations under the Municipal Employees Relations Act (MERA).
- 4. This plan and the benefits hereunder may be withdrawn and rejected by the Town if fewer than two (2) qualified members elect participation in the VERIP by October 15, 2020. However, the Town may waive the minimum number of participants in its sole discretion.
- 5. Any Town decision under this VERIP is final and is not subject to the grievance or arbitration process.
- 6. Any employee electing the VERIP may leave earlier than the November 1, 2020 retirement with a minimum of two weeks' notice.
- 7. Notwithstanding any restriction to the contrary, employees/retirees may be reemployed in a part time or temporary status, in any capacity, provided they are working less than twenty (20) hours per week on average.
- 8. The VERIP is a one-time offer and may not be extended or implemented in future years unless the Town and the Union are in mutual agreement to reinstate such a plan. This plan shall not establish any precedent or be used to indicate a past practice by either party in the future. This plan does not in any way alter, add to or delete from the current collective bargaining agreement between parties, except as specifically stated herein for those qualified applicants who meet the eligibility criteria and elect participation in this

plan.

9. Severance payments for vacation and compensatory time off, if applicable, shall be paid in two equal installments, one in November 2020 and the second in July 2021. The payout amount shall be determined by the union contract or past practice.

For Town	For Union
Dated:	Dated:

#### TOWN OF FAIRFIELD VOLUNTARY EARLY RETIREMENT INCENTIVE PLAN ELECTION AND RETIREMENT NOTICE

#### **ELECTION FORM**

I,	hereby	elect to pa	articipate	in the	Town of	f Fairfield
Voluntary Early Retirement Incentive	Plan (	"VERIP").	I unders	tand tha	t this for	m must be
received by the Human Resources off	ice by	4:00 p.m. o	n Octobe	er 15, 20	20. Purs	suant to the
terms of the VERIP, I understand that i	upon re	ceipt of this	form by	the HR	office, m	y voluntary
election to retire, effective November	1, 2020	will be IRF	REVOCA	ABLE.		
21						
Signature						
Date						



INDEPENDENCE HALL 725 OLD POST ROAD FAIRFIELD, CT 06824

(203) 256-3057 (203) 256-3061

October 1, 2020

**RE: Financial Analysis** 

Dear Karen,

Please find the financial analysis requested. Also, please find a listing of job titles in each union. Appendix G is DPW, Appendix A is PETA and Appendix E is THEA. This is a just a listing of the jobs in that union category, this is not reflective of who within the union is eligible. To identify those titles directly would be inappropriate from a personnel standpoint, however, we wanted to give a clearer picture of whom each union encompasses.

If any members have follow up questions, please feel free to forward them and I will try to respond as soon as possible. Thanks for your help in this regard.

Yours truly

H. James Haselkamp

Director of HR.

Shiphalepolitical and Assess	VEI	RIP FINANG	VERIP FINANCIAL SUMMARY		
			1 1 2 2 2 1 1 2 1 1		
	202	2020/21 IMPACT 20/21	2020/21 IMPACT 20/21	2021/22 IMPACT 21/22	2021/22 IMPACT 21/22
	L	All Elect	50% Elect	ALL	50% Elect
Vacation/Comp Time Payout	\$	371,009,13	\$ 185,504.56	\$ 371,009.13	\$ 185,504.56
401 A 5% for Replacements (FY 20/21 6 Months)	↔	99,035.00	\$ 49,517.50	\$ 198,070.00	\$ 99,035.00
Pension Increase*		\$0	\$0	\$ 433,645.00	\$ 216,822.50
OPEB Trust Impact **		\$0	\$0	\$ 587,094.00	\$ 293,547.00
Waiver of Retiree Health Care Contribution**8		\$0	\$0	\$ 47,154.00	\$ 23,577.00
Total Costs	\$	470,044.13	\$ 235,022.06	\$ 1,636,972.13	\$ 818,486.06
Savings	\$	316,947.00	\$ 158,473.50	\$ 633,894.00	\$ 316,947.00
Net Cost	\$	153,097.13	\$ 76,548.56	\$ 1,003,078.13	\$ 501,539.06
* Annual Contribution required to cover liability of ***********************************	\$9,548	3,823 amortized 5.974 amoritzed	*\$9,548,823 amortized (paid back) over 21 years f \$9.745,974 amoritzed (paid back) over 21 vears	ars	
*** Contribution Not Made to OPEB Trust		24 SE SE SE			

202	Saving Est 12 Months
100,877.50 \$	201,755.00
116,626.00 \$	233,252.00
85,930.00 \$	171,860.00
13,513.50 \$	
THE REAL PROPERTY.	
316,947.00 \$	633,894.00
	316,947.00 \$

\*\*\*\*Represents Salary Savings by Hiring New Employees at Lower Salary Analysis reflects all 55 eligible employees retire

## APPENDIX G 2010-2014 TOWN OF FAIRFIELD CLASSIFICATION PLAN OF PUBLIC WORKS POSITIONS

Foreman II	91-H
Conservation Crew Chief	
Wastewater Plant Operator	
VI namise Repairman IV	
Auto. Equipment Operator IV	
III oinshoelvi	
Foreman I	91-H
Wastewater Maintenance Repairman III	
Il oinsdoəM	
Auto. Equipment Operator III	
Maintenance Repairman III	⊅l-H
Wastewater Maintenance Mechanic I	
<b>Greenskeeper</b>	
Auto Equipment Operator II	61-H
Lab Assistant	
Conservation Crewman II	
Wastewater Repairman II	
Maintenance Repairman II	
Wastewater Laboratory Assistant	
Auto Equipment Operator I	
Mechanic I	21-H
Conservation Crewman I	
Assistant Greenskeeper	
Wastewater Laborer IV	
Laborer IV	01-H
Automotive Serviceman	
Maintenance Repairman I	60-H
Conservation Crewman Trainee	3011
Greenskeeper Trainee	
Wastewater Laborer III	
raporer III	80-H
Laborer II	20-H
Laborer I	90-H
JOB CLASSIFICATION	GRADE
IOP OF ACCIETORY	GDVDE

Plumber/Welder

VI namitenance Repairman IV

VI oinshoeM

H-17 Foreman III

Chief Mechanic

Master Mechanic-Police

H-18 Foreman IV Wastewater Operations Foreman

Wastewater Electrical/Instrument Technician Wastewater Collections System Foreman

## $\frac{\mathsf{APPENDIX}\,\mathsf{A}}{\mathsf{SALARY}\,\mathsf{GRADE/CLASSIFICATION}}$

Technical Services Librarian			
Technical Services			
L.			
Maintenance			
Supervisor of Street			
, ,0,1			
Communications Ctr.			
Supv. Emergency			
Young Francis			
Minimoson ( mino			
Staff Accountant			
Senior Internal Auditor			
Senior Civil Engineer			
1			
Librarian			
Reference Services	Officer	Teen Librarian	
	Zoning Enforcement	–	
Programmer/Analyst		Supervisor	
	Officer	Technical Support	
Oben Space Manager	Wetlands Compliance	heart 2 lesindes	
,, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	3 2 2 3 1 2 3 3 5 5 5 6 5 6 5 6 6 6 6 6 6 6 6 6 6 6	Solid Waste Mgr.	
Larks	PC Programmer	10M etseVV bilo2	
General Supervisor of	DC Programmer	famon i	
General Supervisor of	IONDON ( IDNI ON I	Facility	
loous lodge of since	Internal Auditor	Maintenance Mgr. WPC	
Garage Supervisor			
Jacobson Lune L Courte -	, səərT	Librarian	
Deputy Tax Assessor	General Foreperson-	Information Tech.	
Contracts Manager	Deputy Tax Collector	Director of Recycling	
		. –	
Librarian	Construction Supvr.	Enforcement Off.	
Children's Services	,	gninoZ f'ssA	
	Recreation	. <u>~</u> 11 V	
Cad Specialist	Assistant Director of	Animat Control Officer	Help Desk Technician
6 98	SG 8	7 DS	
000	6 03	2 03	9 9 9 9 9 9

		General Supv Streets & Highways	Supervisor of Nurses
		_	Conservation Adm.
		Engineering Manager	Supervisor
	Tax Collector	Deputy Town Librarian	Building Maintenance
_	Facility (Operations) (Administration)	Building Official	Branch Librarian
	Superintendent of WPC	Budget Director	Ass't Director of Health
	Manager	Morks	Planing & Painns
Controller	Information Systems	Ass't Director of Public	nwoT .Town
21 9S	11 9S	11 9S	OF 58

#### "3" xibneqqA

#### **A**3HT

2-HT

#### Mailroom Service Worker Engineering Aide/Drafter Custodian 1-HT POSITION TITLE GRADE

obit vacadi l	
Secretary "C"	
Accounting Clerk	E-HT

Cashier School Health Aide Account/Payroll Clerk Data Entry Clerk LIDTATY AIGE

Clerk-Typist

Clerk Typist

Community & Economic Develop. Specialist

Instrument Operator/Drafter Library Aide **7-HT** 

Voter Registration Administrative Secretary Computer Operator

Conservation Administrative Secretary Senior Accounting Clerk

Secretary "B" 2-HT

Fire Marshal Administrative Secretary Accounting Clerk - Public Works

Marina Coordinator

Platform Scale Operator

Parts Clerk Planner-Drafter

Junior Buyer Delinquent Tax Collector

Voter Registration Administrative Secretary

Secretary "A" 9-HT

Administrative Assistant - Purchasing

Dental Hygienist Junior Buyer

Payroll Clerk

Housing Inspector

Library Associate

Catalog Reference Assistant Recycling Coordinator

Library Technical Assistant

WPCA Administrative Secretary

Engineering Drafter

Coordinator Circulation Library WPCA Inspector Assistant Director-Purchasing Planner-Town Planning & Zoning Coordinator Circulation Library Building Inspector "B" Coordinator Accounting Services Parks and Recreation Service coordinator Grant Coordinator Coordinator Circulation Library Assistant Animal Control Officer Assistant Survey Crew Reference Librarian Youth and Recreation Coordinator Inspector-Town Planning & Zoning Sanitarian "B" Building Inspector Caseworker - Social Services 7-HT

WPCA Inspector
Coordinator Circulation Libra
Reference Librarian
Associate Analyst
Chemist-WPCA
Senior Assessor
Building Inspector "A"
TH-11

Health Educator
Branch Reference Librarian
Municipal Web Librarian
Branch Children's Librarian
Branch Children's Librarian

21-HT

6-HT

8-HT

Assistant Building Official

"A" naitatina2

Survey Crew Chief