



RESIDENCES AT EVERGREEN WALK

APPLICANT: EVERGREEN WALK, LLC

NOVEMBER 30, 2021



RESIDENCES AT EVERGREEN WALK

ATTY. CHRISTOPHER SMITH

RESIDENCES AT EVERGREEN WALK



Three Applications:

1. Zone Text Amendments - Buckland Road Gateway Development Zone (“GD”): (a) increase cap on number of multifamily units in GD from 200 to 365 units; and (b) clarify the 2:1 aggregate of residential to commercial floor area provision.
2. Amendment to General Plan of Development for Evergreen Walk.
3. Special Exception to permit a 165 unit multifamily residential community development of Unit 7C.

PRESENTERS

- **Atty. Christopher Smith, Altar & Pearson, LLC**
- **Alan F. Lamson, FLB Architecture & Planning, Planning Consultant**
- **Ron Bomengen, Fuss & O'Neill, Professional Engineer**
- **Steven Mitchell, Traffic Engineer**
- **Maura Cochran, Bartram-Cochran, Economic Consultant**
- **Michael Sarasin, Northeast Retail Leasing, Real Estate Broker**
- **Howard Rappaport, Continental Properties**
- **Atty. Christopher Smith, Altar & Pearson, LLC**

Standard of Review for Zone Text Amendment

Three part test:

1. Consistent with the comprehensive plan (zoning regulations and zone map);
2. Consistent with the goals and objectives of Section 8-2; and
3. Consistent with the “South Windsor Plan of Conservation and Development; Adopted: July 23, 2013; Effective: August 18, 2013; Amended: September 21, 2014” (“POCD”).

Standard of Review for General Plan and Special Exception:

1. General Plan:

- Section 4.2.15(D)(2), and Section 8.6.3.

2. Special Exception:

- Section 4.2.15: GD zone district - specific requirements for multifamily residential use.
- Section 4.2.15(D)(4), and Section 8.4(B) – Special Exception criteria.



RESIDENCES AT EVERGREEN WALK

ALAN F. LAMSON, FLB ARCHITECTURE & PLANNING

RESIDENCES AT EVERGREEN WALK

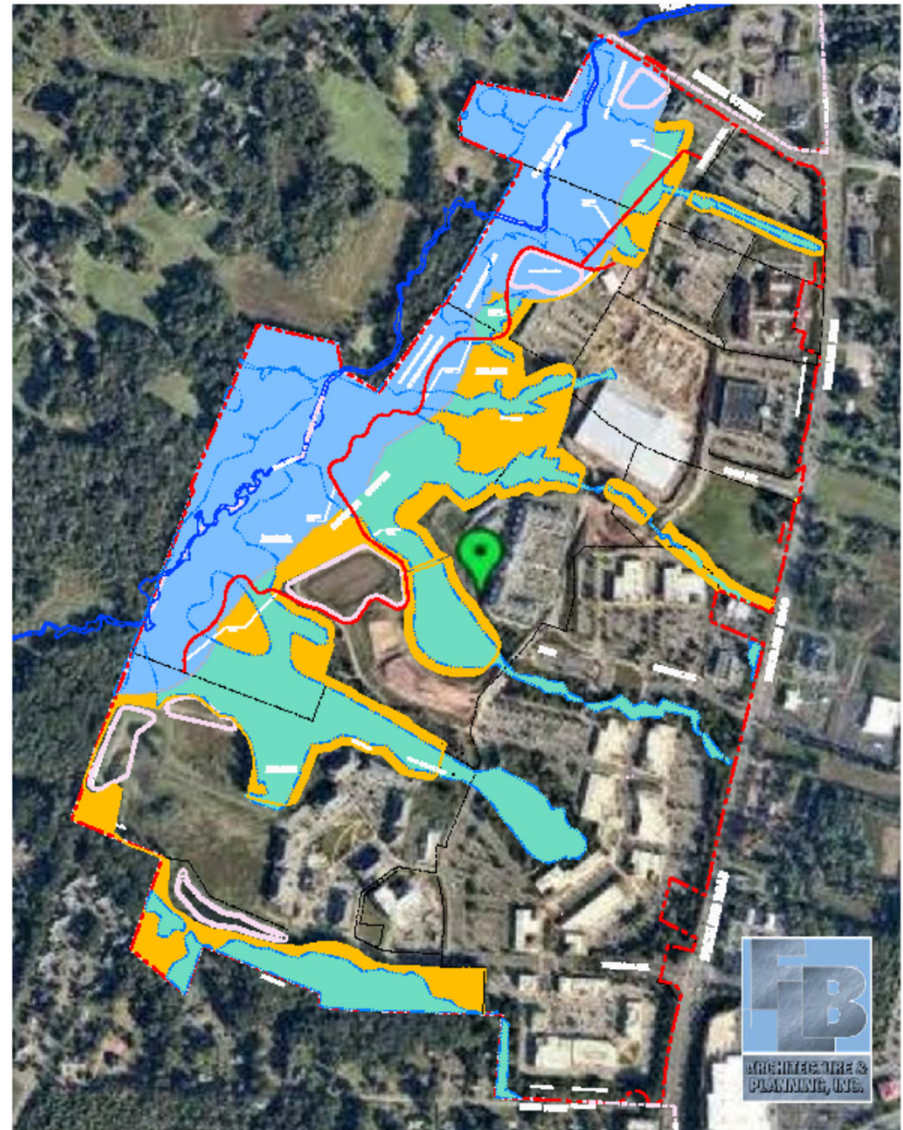


REGULATED OPEN SPACE EVERGREEN WALK

Riparian Buffer along Plum Gulley
Brook

Wetlands

DEEP Non-developable Area



SITE IMPROVEMENTS/CONDITIONS EVERGREEN WALK

Completion of Tamarack Avenue

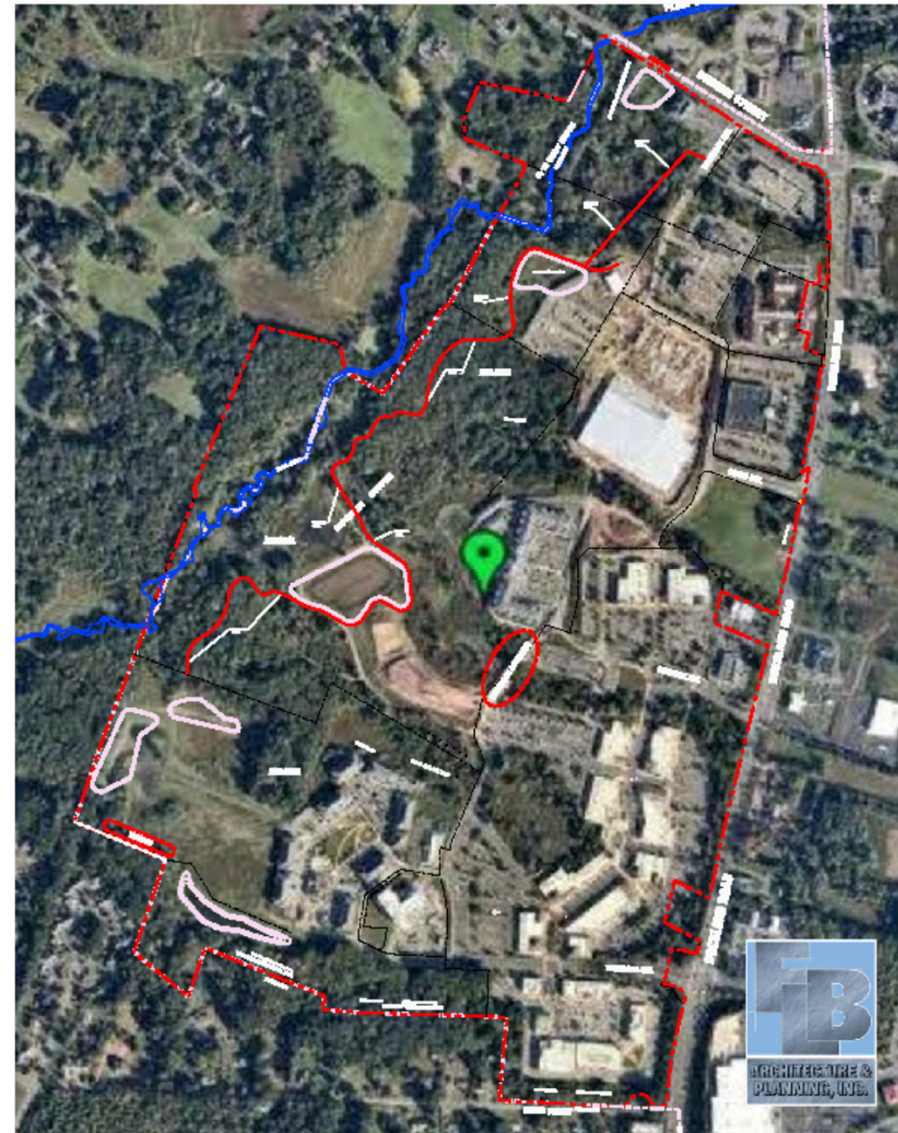
Completed November 2021

Trail

Completed September 2021

Landscaped Berm

Under construction



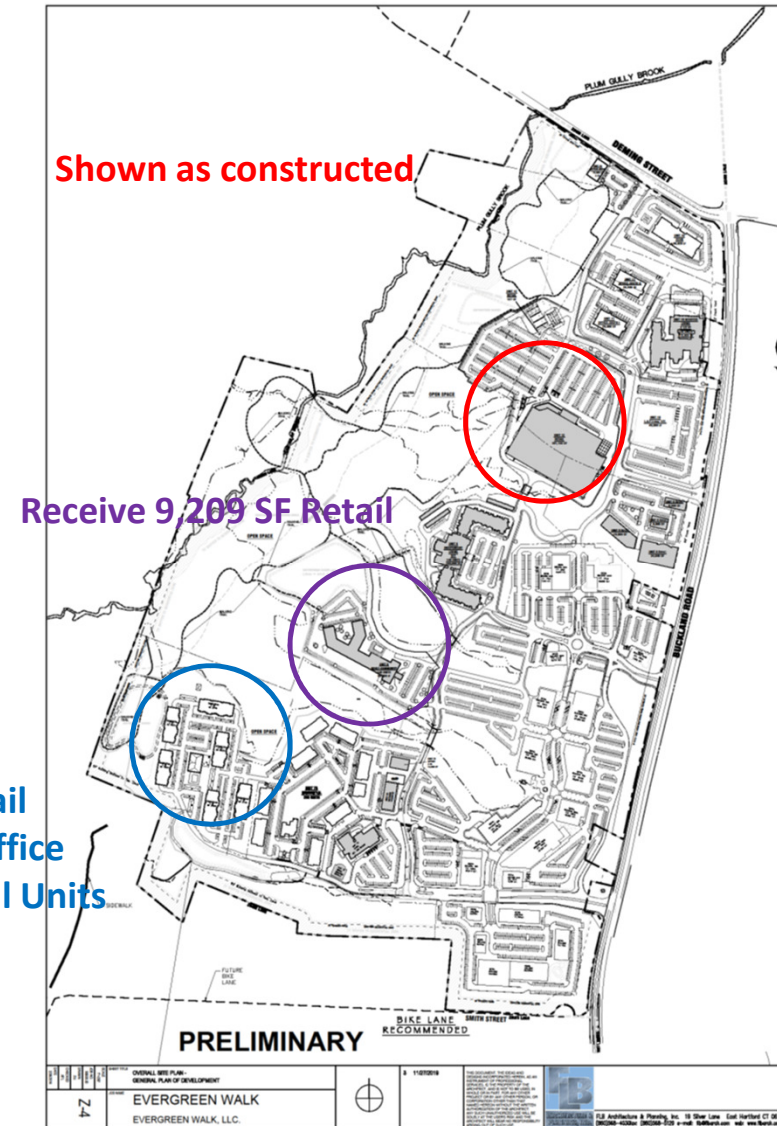
EVERGREEN WALK

LAND USE TABLE REVISIONS

LAND USE TABLE							
LAND AREA WITHIN							
THE BUCKLAND ROAD GATEWAY DEV. ZONE 229.9 AC				13.1 AC			
THE RURAL RESIDENTIAL ZONE				243.0 AC			
OVERALL PROPERTY				243.0 AC			
UNIT		EXISTING	APPD/PROP	TOTAL	PKG EXIST.	PKG U/C	PKG PROP.
BUILDINGS, RETAIL							
2	The Shops at Evergreen Walk	284,750 SF			1,709		
1	The Shops - Phase II	90,250 SF			542		
5	Wright Property (Unit 5)		50,000 SF				200
12	Unit 4/9/12/13/Parcel C (COSTCO)	161,271 SF			770		
7C	Unit 7C		0 SF				0
7F	Unit 7F		5,000 SF				25
8	Unit 8		9,209 SF				46
TOTAL		536,271 SF	64,209 SF	600,480 SF	3,021	0	271
COMMERCIAL							
7E	Daycare		10,000 SF		40		
TOTAL			10,000 SF	10,000 SF	40		
BUILDINGS, OFFICE							
1	The Shops at Evergreen Walk	3,870 SF			20		
15	ECHN Medical Center	39,820 SF			200		
11	Office - South I & II	58,800 SF			296		
14	Office - Unit 14	15,000 SF			61		
7D	Office - Unit 7D		12,000 SF				59
5	Unit 5		60,000 SF				290
7C	Unit 7C		0 SF				0
TOTAL		117,490 SF	72,000 SF	189,490 SF	577		349
BUILDINGS, RECREATION							
10	LA Fitness at Evergreen Walk	45,000 SF			310		
TOTAL		45,000 SF		45,000 SF	310		
BUILDINGS, HOTEL							
7A	Hotel - Town Square (approved)	108 Rooms			116		
TOTAL		108 Rooms		108 Rooms	116		
BUILDINGS, RESIDENTIAL							
7B	Tempo I	200 Units			350		
7C	Residences at Evergreen Walk		165 Units				313
TOTAL		200 Units	165 Units	365 Units	350		313
BUILDINGS, INSTITUTIONAL							
16	Unit 16 - Assisted Living/Memory Care		120 Units		84		
			115,000 SF				
3	Unit 3/4 - Independent Living		140 Units		163		
			185,000 SF				
8	Unit 8 - Independent Living		140 Units				155
			180,000 SF				
TOTAL			400 Units	400 Units	247		155
			480,000 SF	480,000 SF			

OVERALL SITE PLAN RESIDENCES AT EVERGREEN WALK

Move 9,209 SF Retail
Delete 30,950 SF Office
Add 165 Residential Units



REMAINING UNDEVELOPED PARCELS EVERGREEN WALK

Unit 5	4.3 Acres
Unit 7E	0.8 Acres
Unit 7C	12.0 Acres
Unit 8	6.4 Acres

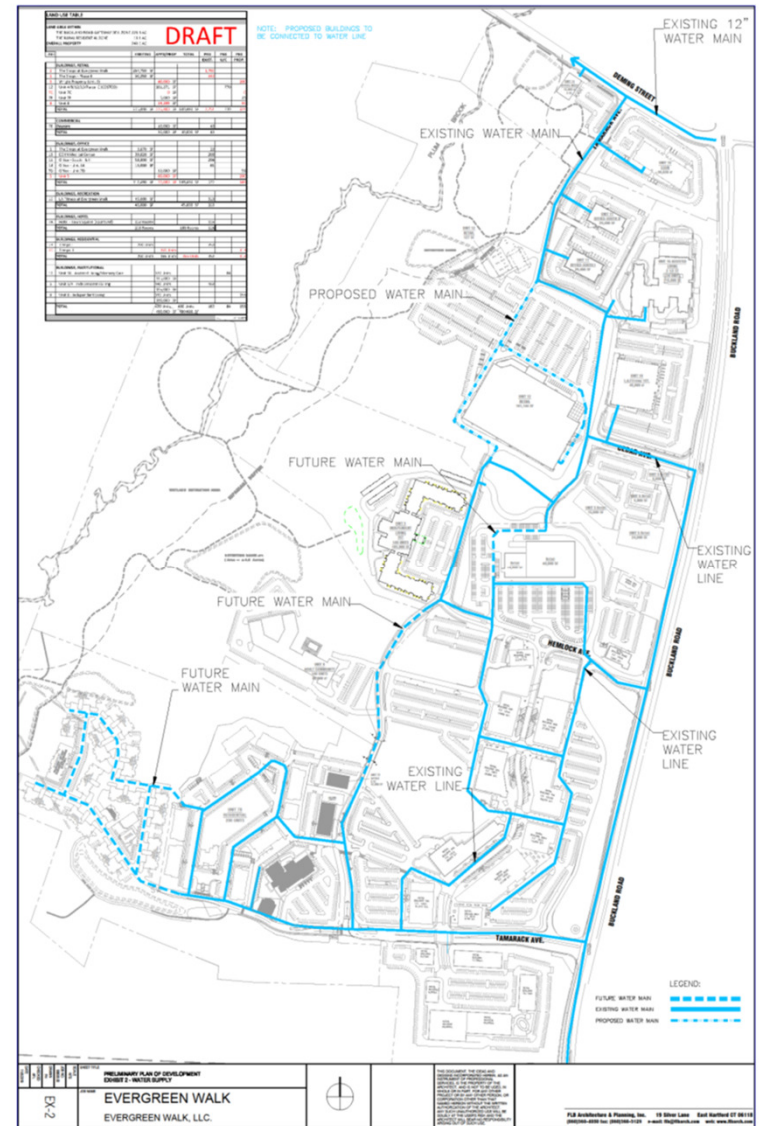




RESIDENCES AT EVERGREEN WALK

RON BOMENGEN, FUSS & O'NEILL

WATER SUPPLY - EXHIBIT





RESIDENCES AT EVERGREEN WALK

STEVEN MITCHELL, TRAFFIC ENGINEER

TRAFFIC GENERATION SUMMARY

Table 2
Trip Generation Summary

Use	Size	Daily Traffic			AM Peak Hour			PM Peak Hour			Sat Peak Hour		
		Enter	Exit	Total	Enter	Exit	Total	Enter	Exit	Total	Enter	Exit	Total
Office	30,950 SF	550	550	1100	67	19	86	30	77	107	58	44	102
Residential	165 Dwelling Units	449	449	898	15	44	59	44	29	73	37	39	76
Change in Generation		-101	-101	-202	-52	25	-27	14	-48	-34	-21	-5	-26

Note: A negative number represents a reduction in generated traffic.



RESIDENCES AT EVERGREEN WALK

MICHAEL SARASIN, NORTHEAST RETAIL LEASING



RESIDENCES AT EVERGREEN WALK

MAURA COCHRAN, BERTRAM-COCHRAN

Tempo II Evergreen Walk

South Windsor, CT

Tax Impact Study

BARTRAM & COCHRAN

All information in this report is from sources we believe to be accurate, but do not warrant.



Goal of Report

To assess the impact to the Town of South Windsor of:

- 165 new apartment units on the PK-12 school system
- This development on municipal services (water, sewer, fire, police, recreation, library, etc.)
- This development regarding taxes.

Methodology

Bartram & Cochran researched and interviewed:

Demographic data

Town of South Windsor and Board of Education staff

Local developers and real estate professionals
Realtor/ Zillow websites

Malone and Macbroom: “South Windsor Public Schools
Enrollment Projections Update” (October 2019)

Rutgers Center for Real Estate “School-Age Children in Rental
Units” (July 2018)

Goman & York report on the impact of 125 multi-family units
in South Windsor (2021)

National Association of Home Builders,
“The Economic Impact of Home Building”

US Census

Connecticut Partnership for Balanced Growth



Key Findings

Tempo I does, and Tempo II will, generate a positive cash flow to the Town.

Tempo II design, “The Big House”, will attract young professionals and those over age 55.

The majority of new school age children come from large, single-family homes, not apartments.

South Windsor is currently building a new grammar school.

Evergreen Walk contributes to the quality of life of the Town; adding residential enhances the community’s vitality

Adding more multi-family to Evergreen Walk strengthens the retail, office and industrial markets in the entire Town and region.



South Windsor Grand List

The Evergreen Walk development enhances the quality of life and subsidizes the education in South Windsor.

The Shoppes at Evergreen Walk is the #2 on the Grand List with an AV of \$31,928,600, paying \$1,208,816 in taxes annually

Evergreen Crossing Retirement is #4 on the Grand List with an AV of \$29,345,384, paying \$1,110,016.

Costco has an assumed AV of \$14,000,000 and will pay \$530,040 (after tax abatement ends) and \$212,016 (with 7-year abatement),

To date, only one development at Evergreen Walk, Tempo I, has added to the student population. The taxes they pay, even with a five- year tax abatement, covers the costs of their student population and Town Services.

After Tempo II, Evergreen Walk will have only three sites left for development: .5 acres, 8 acres (that has been approved for 140 units of over age 55 housing) and 5 acres along Buckland Street that is slated for commercial use.

Sources: Town Of South Windsor Assessor's Office and Evergreen Walk

Evergreen Walk

Enhancing
the quality
of life in
South
Windsor

- Costco
- LA Fitness
- Cambria Hotel
- Senior Housing
- Medical Offices
- Tempo I
- Apple
- L.L. Bean
- Williams Sonoma
- Munson's
- The Paper Store
- Sephora
- Soft Surroundings
- Banana Republic
- Ben & Jerry's
- Burton's Grill
- Carhartt
- Chicos
- Eddie Bauer
- New Balance
- Omaha Steaks
- Panera Bread
- Pottery Barn
- Stonewall Kitchen
- Talbot's
- Ted's Montana Grill



South Windsor Housing

Long time residents are selling homes to families with children.

The median valued of a home is \$297,000 and pays taxes of \$7,800. If there are students, then taxes do not cover the cost of education, let alone other municipal expenses.

Multi-family developments, such as Tempo I and Tempo II (when built), contribute to the Grand List, as well as the vitality of the Town.

South Windsor Residential

Bedrooms	Estimate	Percent	Tempo II	Adjusted	Adjusted
Studio	82	1%	0	82	1%
1 bedroom	791	8%	83	874	9%
2 bedroom	2,098	22%	82	2,180	23%
3 bedroom	4,238	45%	0	4,238	45%
4 bedroom	1,456	16%	0	1,456	15%
5 or more bedrooms	<u>681</u>	7%	0	<u>681</u>	7%
Total Housing Units	9,346	100%	165	9,511	100%

**Large 3 – 5+ bedroom homes make up 67% of the residential stock
Tempo II will have a minimal impact on the inventory.**

Source: U.S. Census



School Future Enrollment

Projecting future enrollment is a complex issue to refine due to:

- Growth is not “linear”.
- A new grammar school is under construction.
- Economic impact of Covid, changing employment patterns.
- Some residents are on 2 to 4-year work visas. Many move back home as their children become teens.
- Growth in enrollment tapers off by high school.

Source: Town of South Windsor Board of Education

Board of Ed Budget 2021-2022

Budget	\$77,958,844
Number of students:	4,588
NCRP	\$16,405

The NCRP (net cost per student) does not reflect the State and other funding which reduces the total cost per student to approximately \$14,600. It also does not reflect the incremental cost per new student, as many educational costs are fixed.

To assess the incremental cost per new student, a recent Goman & York economic impact study in South Windsor calculated the actual cost per new student at \$9,718 (a 35% reduction from the \$14,600).

B&C calculated the adjusted basis per student to be approximately \$11,000, a more conservative 25% reduction.

Students/ Unit

New Development Name	Type	Units	K-12 Student/ Unit	Students
Clark Estate	Single-family	18	1.06	19
Clark Estate 2	Single-family	22	0.77	17
Evergreen Walk Tempo I (actual)	Apartments	200	0.21	42
Residences at Oakland Rd	Apartments	78	0.14	11
South Windsor Woods	Condominiums	155	0.46	38
Estates at South Windsor (Toll Bros)	Single-family	<u>44</u>	1.59	<u>43</u>
All New Developments		418	0.34	143

Apartments produce the fewest student per unit and single-family the greatest number of students

Source: Malone and Macbroom and Tempo I

Tempo I Student Population

School	# of Students	%
Orchard Hill Elementary School	24	57%
Timothy Edwards Middle School	11	26%
South Windsor High School	<u>7</u>	<u>17%</u>
	42	100%

- This reflects the trend of student population dropping by middle and high school.
- Tempo I reported that all students were new to the South Windsor School System.

Estimated Cost of Community Services

Item	Amount	Comment	Interviewed
Education	\$11,000 to \$16,000 per student	\$16,405/ student (BOE); \$11,000 (B&C)	Superintendent Dr Kate Carter
Fire	\$0	No fees, even for false alarms	Fire Chief Walter Summers
Fire Inspections	\$30 per unit	Annual inspection	Fire Chief Walter Summers
Police (EMS)	\$75	Per call (45 calls for Tempo I)	Lt Buonanducci
Water	\$0	Private: CT Water Co.	
Waste Water/Sewer	\$0	Developer pays for initial hookup and annual usage.	Phil Forzley, Fuss & O'Neil
Culture & Leisure (Library/ Parks & Rec)	\$118 per resident	\$3,054,007 budget and 25,709 population.	Town Budget

Sources: Those listed above

Financial Impact

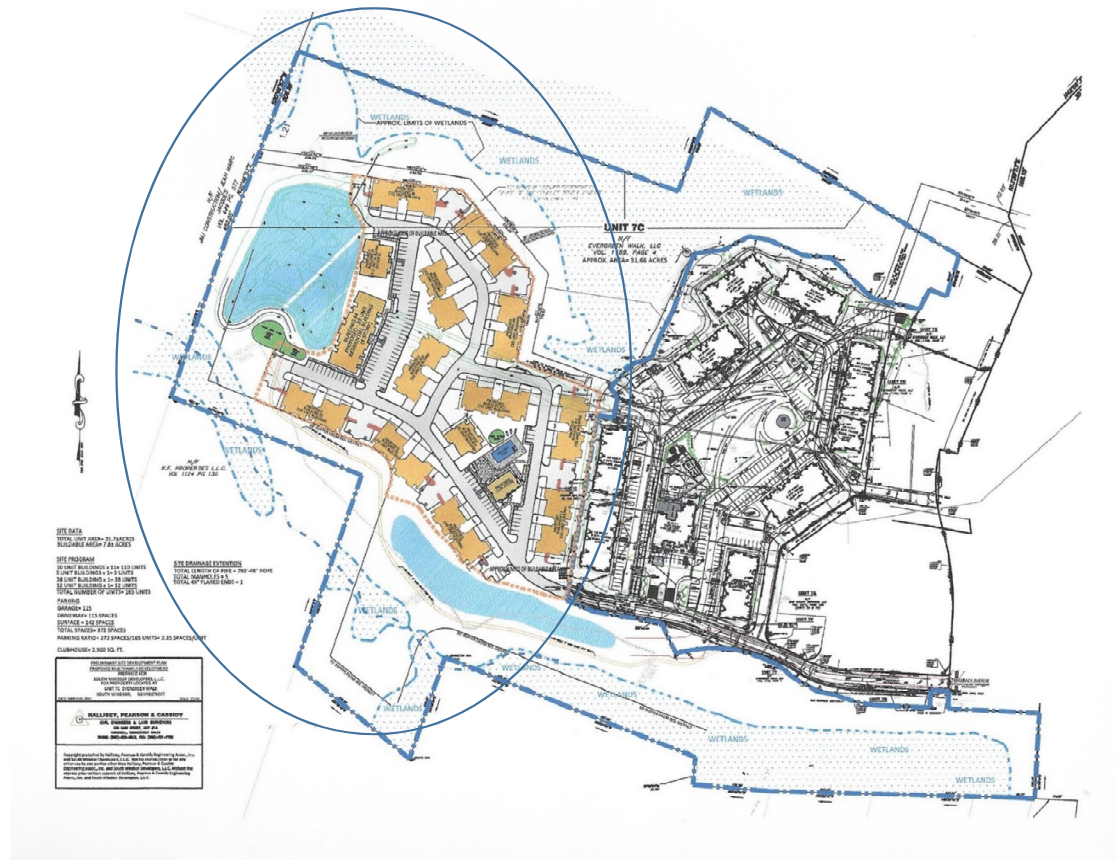
Single Family vs Multi-Family

Single Family

Toll Brothers	
Number of Homes	23
Number of Students	39
AV	\$10,345,700
Taxes (Building and Cars)	\$422,165
Expenses (Education, Culture, Misc.)	<u>\$439,041</u>
Delta	-\$16,876

Tempo I	
Number of Units	200 (50/50)
Number of Students	42
AV	\$20,368,100
Taxes (Building, PP and Cars)	\$1,006,363 (after stabilization)
Expenses (Education, Inspections, Police, Culture)	<u>\$495,125</u>
Delta	\$511,238

Site Plan





Tempo II Proposed Development

Market rate apartment community with a new-to-the market design.

31.67 acres, of which 8.5 acres is buildable

Site could hold 240+ units, Tempo II is proposing a “Big House” design with 165 units.

83 One Bedroom

82 Two bedroom

Parking ratio of 1.5 per unit,
garage units available for additional fee

Amenities:

Outdoor heated pool

Fire pit

Hammock Park

Putting Green

Clubhouse including multi-purpose room and fitness center

Source: Continental Properties

Students/165 Unit Multifamily

Market Rate/ Low Rise/ Income over \$100K

Sources:	Rutgers School Age Children	CT Partnership for Balanced Growth	Malone & Macbroom	Average
One Bedroom	2	3	3	3
Two Bedroom	<u>23</u>	<u>21</u>	<u>27</u>	<u>23</u>
Total	25	24	30	26

- B&C adjusted the Malone & Macbroom 2019 report's ratio upwards to .18 to reflect the actual numbers at Tempo I. If their original ratio of .16 was used, the estimate population would be 26 students.
- Malone & Macbroom estimated 29% of the students in the recent residential developments were new to the South Windsor school system.
- Based on the **actual** factor of .21 for Tempo I, B&C analysis projects 34 students in public schools. B&C applied no discount for those already in the school system, as all 42 students at Tempo I were new to the South Windsor schools.

Tempo II Student Population (Est)

School	# of Students	%
Orchard Hill Elementary School	19	57%
Timothy Edwards Middle School	9	26%
South Windsor High School	<u>6</u>	<u>17%</u>
	34	100%

Sources: Based on actual Tempo I

Tempo II - Estimate Tax Impact

151 Buckland St, Unit 7C

Assumptions		Value Upon Stabilization
<u>Income to Town</u>		
165 Units, with an AV of \$16,803,683		\$636,187
Personal Property and Cars		<u>\$167,315</u>
Subtotal		\$803,503
<u>Estimate Cost of Town Services</u>		<u>\$403,980</u>
Potential Increase in Tax Revenue		\$399,523

Sources: Based on actual Tempo I

Impact of 165 Units in Local Economy

	Direct and Indirect Impact of Construction Activity	Ongoing Annual Effect that occurs because units are occupied
Local Business Owners' Income	\$4,538,325	\$1,028,280
Local Wages and Salaries	<u>\$7,676,955</u>	<u>\$3,327,885</u>
Total	\$12,215,280	\$4,356,165
Local Jobs Generated	149	73

NAHB estimates the one-year impact of building 165 rental apartments in a metropolitan area is \$19.3 million in income, \$3.6 million in taxes and other revenues and 265 local jobs.

South Windsor would be a fraction of that larger number.



Buckland Gateway Economic Impact

The developments at Buckland:

- Supports Budget Increases
- Avoids Residential Impacts
(existing development = average tax savings per house of \$3,832)
- Absorbs State Revenue Losses
- Creates Employment Opportunities
- Improves general quality of life assets

Success Factors

- New design in the market that is not “cookie cutter”
- Supportive demographics
- Minimal comparable competition
- High competitor occupancy
- Rents are at competitive price point
- Amenities offered meet the market demand
- They forecast stabilization (95% occupancy) within 36 months of opening

A large vertical rectangle with a dark blue-to-light blue gradient. On the left side, there is a black, irregular shape that looks like a stylized 'C' or a folded piece of paper.

Continental Properties

Among the largest developers in the State of Connecticut

Built more than 25,000 dwelling units in past 64 years, including condominiums, apartments, townhomes and single-family communities

Diversified, integrated real estate organization, with proficiency in all facets of development from site selection through rental and sales

Developed, owns and manages over 5,100 rental apartments in dozens of communities, including “for sale” and rental housing

Source: Continental Properties



Financial Stability

Founded 64 years ago

Privately held organization with superior financial strength, demonstrated by its track record

A generational holder of the communities it develops – “build and hold”

Have developed over 23 apartment rental communities

Owns and manages over 5,100 rental units in Connecticut and New Jersey



Award Winning

Continental's commitment to developing best-in-class communities is reflected in its meticulous attention to design and aesthetics. Their developments have received numerous awards from the Connecticut Apartment association, including:

- Best Curb Appeal, 2015 Alterra, Rocky Hill
- Best Innovative Idea 2015, Alterra, Rocky Hill
- Best Curb Appeal, 2016. 2017 & 2018, The Mark, Shelton
- Best Innovative Idea 2016, The Mark, Shelton
- Green Property of the Year 2018, Tempo, South Windsor
- Best Seasonal Design 2018, Tempo, South Windsor
- Best Innovative Idea 2019, Tempo, South Windsor



RESIDENCES AT EVERGREEN WALK

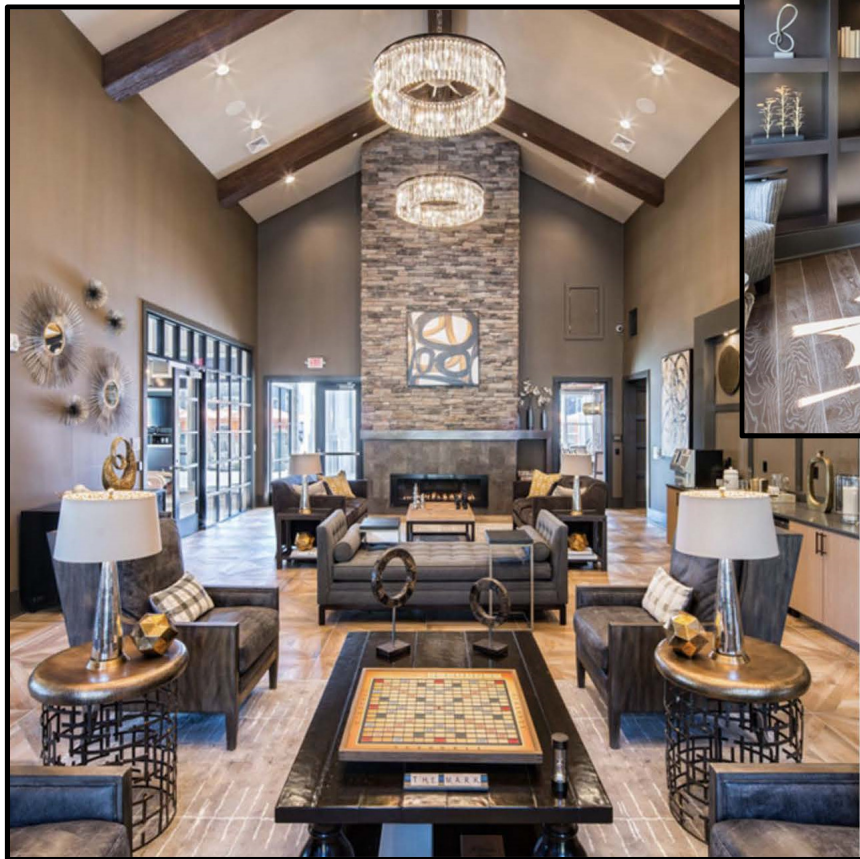
HOWARD RAPPAPORT, CONTINENTAL PROPERTIES

CONTINENTAL PROPERTIES PROJECT PHOTOS





CONTINENTAL PROPERTIES
PHOTOS
EXTERIOR COMMUNITY AMENITIES

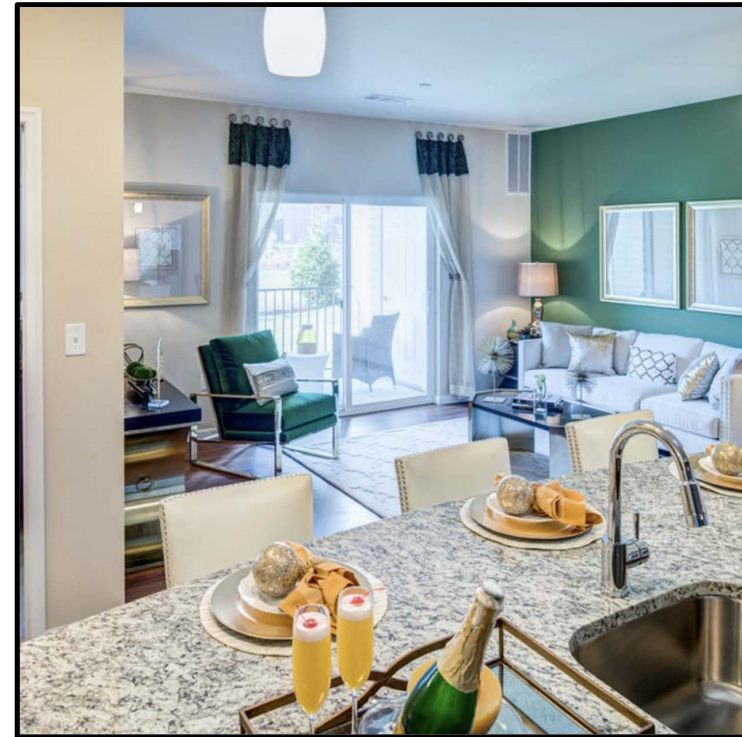


CONTINENTAL PROPERTIES PHOTOS

INTERIOR AMENITIES & COMMUNITY SPACES

CONTINENTAL PROPERTIES PHOTOS

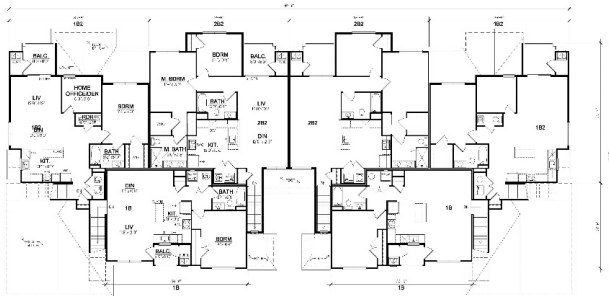
INTERIOR OF RESIDENCES





PROPOSED SITE PLAN

“Cottage Style” Floor Plans



Building Type A - 2nd Floor Plan

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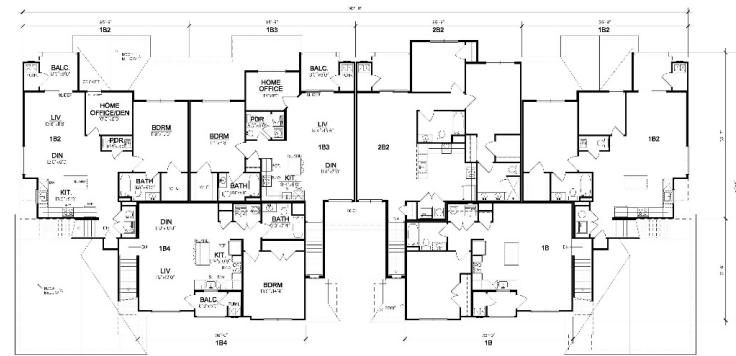


Building Type A - 1st Floor Plan

Scale: 1/8" = 1'-0"

Apartment	Area	Units
Unit 101	886 sq./ft.	2
Unit 102	1,007 sq./ft.	2
Unit 201	1,131 sq./ft.	2
Unit 202	1,228 sq./ft.	2
Unit 203	1,128 sq./ft.	2
Total Units		10
Total Garages		10

Basement



Building Type B - 2nd Floor Plan

Scale: 1/8" = 1'-0"

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Building Type B - 1st Floor Plan

Scale: 1/8" = 1'-0"

Apartment	Area	Units
Unit 101	886 sq./ft.	1
Unit 102	1,007 sq./ft.	2
Unit 103	1,007 sq./ft.	1
Unit 104	918 sq./ft.	1
Unit 201	1,131 sq./ft.	2
Unit 202	1,228 sq./ft.	1
Unit 203	1,128 sq./ft.	2
Total Units		10
Total Garages		10



Building Type A - Front Elevation

Scale 1/8"=1'-0"

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Building Type A - Typical Side Elevation

Scale 1/8"=1'-0"



Building Type A - Rear Elevation

Scale 1/8"=1'-0"

Managed By: BGL
 Drawn By:
 Checked By:
 Revisited By:
 Date:
 Issue For Permit:
 Issue For Review:
 08-02-21
 Issue For Construction:
 Revisions:



NEW MULTI-FAMILY APARTMENT PROJECT FOR
EVERGREEN AT SOUTH WINDSOR
 South Windsor, CT

Thomas J. Brennan
ARCHITECTS
 3607 Parkwood Blvd.
 Suite 100
 Plain, Rhode Island 02860
 Phone: 401-863-3948
 Fax: 401-863-8110

“Cottage” Elevations



FRONT ELEVATION

4-Story Building Elevation



Building Type A - Front Elevation

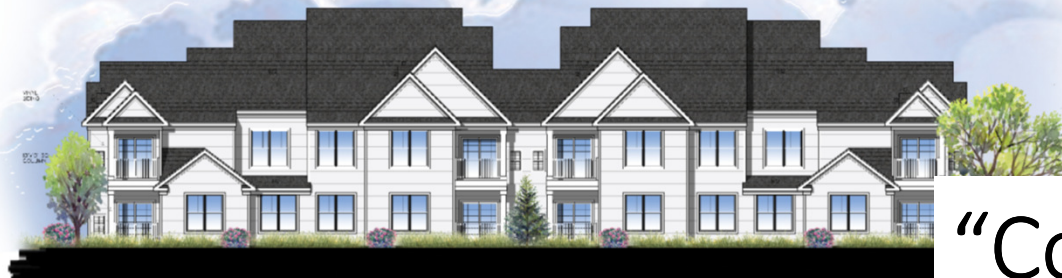
Scale: 1/8"=1'-0"

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Building Type A - Typical Side Elevation

Scale: 1/8"=1'-0"



Building Type A - Rear Elevation

Scale: 1/8"=1'-0"

Managed By: BDL
 Drawn By:
 Checked By:
 Revisited By:
 Date:
 Issue For Permit:
 Issue For Review:
 Issue For Construction:
 Revisions:

1. All drawings are prepared for the project and are not to be used for any other project without the express prior written consent of the architect and shall not be used for reproduction or any other purpose without the express prior written consent of the architect.

EVERGREEN AT SOUTH WINDSOR
 South Windsor, CT

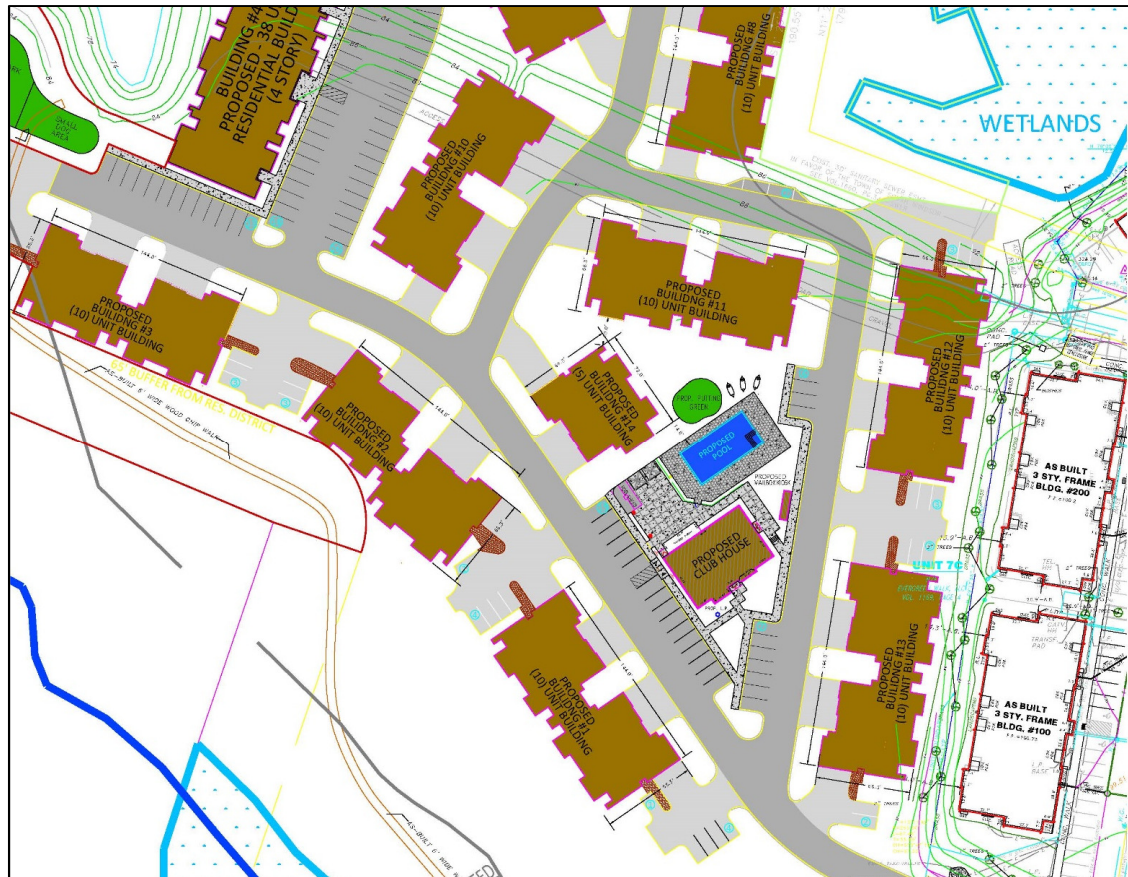
Thomas J. Brennan
 ARCHITECTS
 1001 Parkwood Blvd.
 Suite 200
 Fitch, Texas 75134
 972-467-1010
 Fax:
 972-467-1011

Architects

“Cottage” Elevations”

SCHEMATIC CLUB HOUSE IMAGES





CLUB HOUSE AMENITIES



Rendering



Rendering



Rendering



Rendering



RESIDENCES AT EVERGREEN WALK

ATTY. CHRISTOPHER SMITH



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APPLICANT: EVERGREEN WALK, LLC

NOVEMBER 30, 2021

