

April 3, 2022

Spotswood Collaborative responses to letter dated March 29, 2022

Dear Mr. Halasz,

Thank you for the opportunity to share our responses with you, your staff, the Mayor and City Councilors as you evaluate our capabilities, experience and interest in Lexington and the Spotswood development site. To assist in your evaluation and comparison of the two developer teams, we would like to reiterate the Collaborative's ability and willingness to develop this project as solely a rental community, as well as a combined ownership/rental solution, if that is the ultimate decision by Council. To date the City has not specifically required a sole apartment style project to be developed on the site, but invited creative and best use solutions regarding the 2.3 acre Spotswood site. As such we presented alternate development proposals to demonstrate our experience, creativity and interest to undertake any type of development model the City should identify as ultimately preferable. We believe our garden apartment proposal for Spotswood Green provides the best balance of density, scale and economic outcome for the City. Additionally, our development team consists of local professionals in every discipline required to ensure successful design and construction followed by exceptional, long-term management upon completion.

Response - Demonstrated experience in and capability for designing, permitting, developing and managing similar projects.

Spotswood Collaborative members have hundreds of projects in their portfolio each requiring designing, permitting, developing and managing their successful outcomes. On top of being respected local professionals their work can be seen not only in Lexington and Rockbridge but throughout the state and beyond. Each team member is a leader in their respective field and together they bring to the table well more than a hundred years of cumulative experience in designing, permitting, developing and managing projects of this type.

Response - Outcomes of comparable projects undertaken by the development team, including developments you wish to highlight.

Our team members have completed a number of comparable projects with successful outcomes and long term value in the communities they are located. To note a few:

- Penrith Subdivision, Lexington Virginia - 32 lot single family subdivision
- Pikes Place, Rockbridge Co., Virginia - 67 unit Town Home Community
- Lee Street, Lewisburg, West Virginia - 24 residential dwelling units and 22 commercial spaces
- Dutch Inn, Lexington, Virginia - 14 residential dwelling units and 3 commercial spaces
- First National Bank Building, Lexington, Virginia - 9 residential dwelling units and 2 commercial spaces
- Magnolia Square, Rockbridge Co., Virginia – 20 residential dwellings and 9 commercial spaces
- Thompson's Knoll Subdivision, Lexington, Virginia – 16 lot single family subdivision
- The Weatherburn, Lexington, Virginia – 52 lot single family subdivision
- The Pinnacle, Rockbridge Co., Virginia – 59 unit Town Home Community

Response - Experience working with environmental agencies and other similar, permitting agencies where approvals are likely to be needed.

Our team has extensive experience in designing, permitting and developing projects in close partnership with a multitude of both local and state agencies including the Virginia Department of Transportation, Army Corps of Engineers, Virginia Department of Environmental Quality, Maury Service Authority, Lexington Public Works, Utilities Processing, and Planning and Development Departments and other relevant agencies. We have successfully completed dozens of projects where specific performance bonds were required as part of the developer's performance guarantee.

Response - Property management experience for other, similar projects.

Spotswood Collaborative includes professional real estate investors and professional property managers. Our members own close to a hundred rental properties in Lexington and the surrounding area including in high density residential developments like Valley Pike and The Pinnacle. Bruce Schweizer is a partner in SWVA Property Management, LLC, the largest local property management company.

Response - Financial capacity and ability to complete the project, including securing interim financing.

Our development team has a unique capacity to successfully complete financing of this and other projects in Lexington through our engagement with local banks and other lenders. Additionally our team has expertise in working with private real estate investors to ensure availability of necessary capital. To date our team has successfully financed close to \$34 million worth of projects locally.

Response - Conformity with City Council vision.

Spotswood Collaborative is thoroughly committed to work closely with all members of Lexington's City Council and City staff in order to best conform with the Lexington City Council's vision for the Spotswood development site and any other projects.

Response – Other points that you desire to be considered.

Additional Attachments of professional qualifications included:

- ABL Architecture - Arthur Bartenstein, ASLA – ABL Landscape Architecture is principally devoted to the adaptation of historic, environmentally sensitive landscapes to contemporary needs and goals. The firm seeks to distill the essence of a site, and to respond to its innate character and context with creative, enduring design. ABL assists clients through all phases from initial concept to landscape establishment and maturation. Resume and relevant work attached.
- Lee Merrill, Architect – Principal Architect Lee Merrill works directly with each client and is responsible for, and attentive to the details of design, construction and green building practice essential to the success of the all buildings designed by his company. Cover letter and relevant work attached.
- Schweizer Associates - Heidi Schweizer, Architect – Firm's focus is progressive and mindful design. Progressive in the use of modern building materials and methods. Mindful in how these

materials and methods are utilized to create comfortable, healthy & stylish dwellings, with concerns of environmental awareness and a reverence for the local vernacular.

- Perkins & Orrison - Russ Orrison – Perkins & Orrison is a multidisciplinary firm offering Civil Engineering, Land Planning and Land Surveying services from our offices in Lexington and Forest, Virginia. With three licensed Professional Engineers and three licensed Surveyors, P&O provides services to a wide variety of institutions, residential and commercial developers, governments, businesses and homeowners.
- MaxMark Homes, LLC - Max Ivankov – At MaxMark Homes we pride ourselves on running a multidimensional business model which includes commercial construction and remodeling in our long list of capabilities. We firmly believe that our strong reliance on computer driven systems as well as extensive network of building trades professionals deliver the same results as seen in our residential projects. You can rest assured that our team can provide you and your business with highest standards of quality and value. Naturally this will translate in shorter payback periods for your commercial ventures and long term stability of your business.
- Ben Grigsby – 30+ years of material and direct investment in Lexington/Rockbridge commercial and residential properties. Examples include the ‘Seven Hills’ Inn (now ‘Abigail Inn’), the Rockbridge Building, the ‘Old Library’ building (stabilized for subsequent redevelopment), Mt Moreland Chapel, multiple residential rental properties, as well as being a lead ‘investor/donor’ for RARA’s Piovano Building.

ARTHUR A. BARTENSTEIN, ASLA

Landscape Architect

Address: ABL Landscape Architecture, LLC
104 White Street, Lexington, VA 24450
(540) 464-3736 arthur@ablscape.com

Education: Harvard University Graduate School of Design
Master of Landscape Architecture, 1981
Conway School of Landscape Design
Conway, MA, 1976
Hampshire College, Amherst, MA
Bachelor of Arts, 1976

Professional

Experience: ABL Landscape Architecture LLC, September 2008 to present. Principal.

Frazier Associates, Staunton, Virginia, July 2003 to September 2008, Senior Landscape Architect.

Hill Studio, P.C., Roanoke, Virginia, May 1999 to June 2003, Senior Landscape Architect.

Trillium Design, Lexington, VA, June 1996-May 1999, Principal.

Peter Walker William Johnson and Partners, San Francisco, CA, March 1991-May 1995, Project Architect.

The SWA Group, Alexandria, VA, June 1989-February 1991; Deerfield Beach, FL, October 1984-May, 1989; Sausalito, CA, December 1983-September 1984; Houston, TX, July 1981-November 1983, Principal.

Morgan Wheelock, Inc. Boston, MA, June 1980-December 1981, Project Architect.

City of Boston Parks and Recreation Department, April to September 1979, Construction Superintendent for three park renovation projects.

V. Michael Weinmayr Associates, Boston, MA, June 1977-August 1978, Staff Landscape Architect.

National Trust for Historic Preservation, Yellow Springs, PA, June 1976-March 1977, Student Intern.

Community Tectonics, Architects, Gatlinburg, TN, January to August, 1975, Student Intern.

Berea College Upward Bound Program, Berea, KY, Summers, 1973, 1974, Instructor, Counselor and Neighborhood Youth Corps Team Director.

Registration: Registered Landscape Architect, Commonwealth of Virginia
Registration #0406-000-402

Active Professional & Civic Affiliations:

American Society of Landscape Architects
Rockbridge Area Conservation Council
City of Lexington Architectural Review Board
City of Lexington, Virginia Tree Committee
City of Lexington, Virginia Election Official
City of Lexington, Virginia Main Street Design Committee
Historic Lexington Foundation
Friends of Natural Bridge State Park

ARTHUR A. BARTENSTEIN, ASLA

Landscape Architect

Awards:

Sunnyside Farm Conservation Master Plan, Lexington, Virginia
Rockbridge Area Conservation Council 2019 Land Conservation Award
Responsibility: Chief Landscape Architect

City of Lexington and Rockbridge County Virginia Cultural Landscape Preservation Projects
Historic Lexington Foundation (HLF) Founders Award
Responsibility: HLF Board Member and Landscape Architect

East Nelson Street Corridor Renewal Project, Lexington, Virginia
Virginia Chapter American Society of Landscape Architects 2002 Design Merit Award
Responsibility: Chief Landscape Architect

Principal Group Corporate Extension, Des Moines, Iowa
American Society of Landscape Architects 1998 Honor Award
Responsibility: Design Development Project Architect

Center for Advanced Science and Technology, Hyogo Prefecture, Japan
American Society of Landscape Architects 1998 Merit Award
Responsibility: Design Development Project Architect

Kendal at Lexington Continuing Care Retirement Community, Rockbridge County, Virginia
1999 AIA Citation
Responsibility: Chief Landscape Architect

Toyota City Museum, Toyota City, Japan, PWWJ
American Society of Landscape Architects Merit Award
Responsibility: Project Architect

Longacres Park, Phase I, The Boeing Company, Renton, Washington
American Society of Landscape Architects Honor Award
Responsibility: Project Architect

Greens Crossing Plaza and Fountain, Houston, Texas
Texas Chapter American Society of Landscape Architects Merit Award and
Houston, Texas American Institute of Architects Environmental Improvement Award
Responsibility: Project Designer

Burnett Park, Fort Worth, Texas
Boston Society of Landscape Architects Award of Excellence
Responsibility: Design Team Captain

Related Experience:

Virginia Military Institute, Lexington, Virginia. McKethan Park master plan, Renovation plans for Daniels Courtyard Memorial, North Main Street Parking Lot, Preston Library landscape, VMI Hospital landscape, and currently Letcher Avenue Streetscape at Parade Field and Memorial Garden.

Virginia Horse Center, Lexington Virginia. Led consultant team for 2018 Site Development Master Plan, design of Sterba Court and de Szinay Arena.

Ice House, Harrisonburg, Virginia. Landscape Architecture for renovation of former ice factory to apartments and James Madison University's Public Relations Office.

ARTHUR A. BARTENSTEIN, ASLA

Landscape Architect

60 West Apartments, Lexington, Virginia. Landscape Renovations Plans for entrance, development roadway, and center green space.

Edith J. Carrier Arboretum at James Madison University, Harrisonburg, Virginia. Major expansion of children's garden and learning center now under construction.

Barter Green, Abingdon, Virginia. Master plan for major expansion.

Cheatham Hall Addition, Virginia Polytechnic Institute, Blacksburg, Virginia. Landscape design for building addition.

City of Lexington Nelson and South Main Streets, Lexington, Virginia. Streetscape improvements for major landscape entrance corridors.

Gloucester Point Gateway, Gloucester Point, Virginia. Planning for historic community on the York River integrating public parks and beaches with the Virginia Institute of Marine Science campus and proposed commercial and residential districts.

Jordan's Point Park, Lexington, Virginia. Master plan of park and proposed landscape architecture for 200' pedestrian bridge crossing the Maury River.

Kendal at Lexington, Lexington, Virginia. First phase master planning and landscape design for continuing care retirement community.

Fort Lewis Inn, Bath County, Virginia. Master Plan for 1,000 acre residential development and entrance and memorial garden designs for historic inn.

Montpelier Gateway Project, Orange County, Virginia. Planning and landscape architecture for a new visitor arrival to James Madison's, Piedmont Virginia estate.

Kappa Alpha Fraternity Headquarters, Lexington, Virginia. Planning and landscape architecture for addition of administration building, entrance monument / veteran's memorial, arrival streetscape, and renovation of historic main garden.

Mountain Lake Hotel, Mountain Lake, Virginia. Landscape architecture for a new, 22-unit cottage complex on Blueberry Hill.

Radford University, Radford, Virginia. Design for conversion of Adams Street to a campus pedestrian mall.

Roanoke Visitors Center and O. Winston Link Museum, Roanoke, Virginia. Landscape architecture for the conversion of the former, Roanoke, Virginia Norfolk and Western Passenger Station to a visitor center and museum.

Stonewall Jackson Hospital, Lexington, Virginia. Landscape architecture for new building complex.

Virginia Museum of Natural History, Martinsville, Virginia. Landscape Design for new museum.

Virginia Polytechnic Institute and State University, Blacksburg, Virginia. Landscape Architect for Parking and Transportation Master Plan. Also landscape architecture for expansion of Cheatham Hall.

City of Harrisonburg, Virginia. Led consultant team for master plan and design of major new downtown park and farmer's market. Also Main Street downtown streetscape design.

Lee Wilson Merrill (Licensed Architect) has been designing Virginia and Lexington/Rockbridge County residential and commercial projects since 1976. His architecture and planning office, Lee Merrill, Architects, is located in the historic Campbell House (circa 1842). Raised in California, Virginia, Pennsylvania, Ohio, and New York, Merrill earned two degrees at Princeton University's School of Architecture and Urban Planning: B. A. (Arch.) *magna cum laude* 1970 and the Master of Architecture and Urban Planning in 1973.

From 1974-76, Merrill was the City of Annapolis Maryland's Urban Designer where he developed scores of alternate site plan studies and reviews for municipal agencies and proposed private sector projects. A major responsibility was designing and managing a diverse stakeholders Citizens Design Advisory Committee and its professional consultants in revising and reconstructing the historic downtown Annapolis City Dock area.

Residing in Rockbridge County, Va. since 1977, Merrill began his Lexington architectural career through 1979 working with Hans Schweizer, AIA, designing residences, additions, remodels and a 5200 sq. ft. passive solar Roanoke day care center. In 1980 Merrill was hired by Virginia's Energy Division in Richmond to deliver that agency's Solar Design Assistance Program. As the Virginia Passive Solar Design Consultant until 1983, Merrill created and administered the first educational programs advocating passive solar energy and efficient design for designers and builders throughout the Virginia housing industry, and addressed scores of public and private sector audiences. Merrill was also responsible for designing and computing the energy performance evaluations of all applicant plans to the Virginia Grant Program for Solar Houses, which awarded principal reduction grants totaling \$2.1 million with up to \$5000 per house for new passive solar homes for low and middle income Virginians

In 1982, Merrill established his own Lexington architectural practice (now Lee Merrill, Architects) and as of 2010 has designed 32 building projects for

institutional/commercial clients, over 100 additions/remodels and over 92 new Virginia residences, almost all passive solar oriented designs.

Merrill has served his community as a Trustee of Historic Lexington Foundation, a Board Director of Rockbridge Habitat for Humanity, originated the Lexington Tree Committee (now a Lexington City Board), and as a Director and President of the Rockbridge Area Conservation Council.

History of the Firm:

Lee Merrill's architectural practice has remained a small firm since its beginnings in 1982 as Commonwealth Design, then Commonwealth Architects after 1985, and now Lee Merrill, Architects in 2010. Principal Architect Lee Merrill works directly with each client . is responsible for, and attentive to the details of design, construction and green building practice essential to the success of the all buildings designed by his company.

Today, as over the years other talented architects and designers have worked in the firm and some have gone on to their own practices where they continue to work in sustainable design. Current associates and engineering consultants of the Firm are broadly talented and well versed in their specialized and supportive roles in providing comprehensive and effective professional architectural design services.

Firm's Approach to Ecological Design

On behalf of clients and community, our primary architectural intention is to envision, develop and see well built that insightful design which best balances and realizes the Client's fully considered program, personal aesthetic delight and budgeted resources in an artful, energy conscious, and environmentally sustainable manner.

As an experienced and continually learning environmentally conscious architect, I invite and assist every client to understand the physical and social effects their project's design has on the health of their family, institution, community and environment.

We encourage our clients to be involved in the design and building process to the greatest extent possible from initial the budgeting, programming and design phases through to the building's completion and use. Experience has shown us that clients who participate fully in every appropriate aspect of their project are more likely to be the most satisfied with the end results.

The team's design purpose is to identify, select and insightfully synthesize the complex of living pattern preferences, spatial ideas, material choices and technical systems comprising a building's design or redesign into a well suited , beautiful, affordable, and sustainable setting for our client's life purposes and enjoyment.

Balancing Solar and Energy Conservation in Design

From my earliest Lexington residential project (1976 House for Larry and Sally Mann), fully developed passive solar building designs have proven successful in realizing generously daylight rooms with open views into the green environment outside while being naturally warm in winter and comfortably cool in summer and requiring only modest purchased energy. "building homeostasis" was my early personal name for a pinnacle goal of designing buildings which needed no outside energy to maintain comfortable thermal and lighting conditions. In 2010, the leading edge of energy conscious design remains tightly sealed, highly insulated building envelopes with fully developed intrinsic solar heating and natural cooling features (passive solar), adequate thermal mass, natural ventilation, seasonally thoughtful daylighting , high performance windows, efficient electric lighting systems, and minimally sufficient mechanical systems. The remaining energy needs of such a home can then be met by the market ready renewable energy technologies of solar hot water and photovoltaics. Increasingly popular performance goals such as Net Zero Energy or even Net Positive Energy Houses are now feasible and desirable. Our clients choose when they will invest in these technologies, but we strive to design their projects to be ready for these technologies as the economics of energy continue to shift away from polluting fossil fuels to clean, on site, renewable energy sources.

Green Architecture: reduce, reuse, adapt

While energy efficiency is the foundation of environmentally sustainable new building design, other environmental effects of buildings are significant and the emergence of green architecture reflects a deepening attention by designers to strive for the most environmentally benign building patterns, materials, and practices. Our firm encourages our clients to embrace the principals of green architecture they deem appropriate to their project including the pursuit of LEED (Leadership in Energy and Environmental Design), Passive House , EarthCraft, EnergyStar, Green Globes, or any other emerging quality environmental certification standard. Whether pursuing certification or not, Lee Merrill, Architects value and utilize the relevant and cost effective practices well identified in the Green Building Rating System.

Fundamentals of environmentally sustainable home design:

Employ wholistic thinking, programming and creativity

Be efficienct with resources: Less is more, the not so small notion, biggest bang for the buck, recognize and realize cost effective solutions

Account life-cycle costs including operational, maintenance, and durability,

Minimize transportation impacts by project location, use of local materials and efficiency by design

Use non-toxic, natural, and recycled content building materials

Home design connects with the site's patterns and microclimate

Home's form harnesses solar orientation's seasonal benefits

Super airtight construction and sufficient controlled fresh air

Configures for effective natural ventilation and night cooling

Provide desired daylighting using high efficiency window glass

Provide sufficient insulation into the thermal envelope

Use efficient electrical, lighting, and hot water systems

Plan and invest in solar thermal domestic hot water

Plan and invest in solar photovoltaic or geo-heat pump systems