

LYNDON PAUL LORUSSO CHARITABLE FOUNDATION
OF 2002

July 24, 2025

VIA HAND DELIVERY

Mr. William A. Jones, III, Chair
Prudential Committee
Barnstable Fire District
1841 Phinney's Lane
Barnstable, MA 02630

Re: Water Department Lease

Dear Mr. Jones:

On behalf of the Lyndon Paul Lorusso Charitable Foundation of 2002, we are pleased to submit our proposal in response to the Barnstable Fire District's Request for Proposals regarding the lease-to-purchase real estate for use by the water department (the "Proposal").

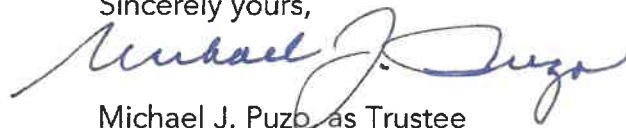
Enclosed please find one (1) original and five (5) copies the following documents:

- Proposal;
- Price Summary;
- Certificate of Non-Collusion and Tax Compliance Certificate;
- Disclosure of Beneficial Interest;
- Certificate of Authority; and
- List of References.

We look forward to working with the Barnstable Fire District and contributing to the smooth transition to a new office space. Please contact Paul Lorusso at (774) 994-1569 or paul@lhequip.com if you have any questions or want to schedule a meeting.

Thank you for considering our proposal.

Sincerely yours,

A handwritten signature in blue ink, appearing to read "Michael J. Puzo".

Michael J. Puzo as Trustee

**Lyndon Paul Lorusso Charitable
Foundation of 2002**

RFP Proposal

For Lease-to-Purchase – Water Department Use

TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	2
SECTION I: PROPERTY OVERVIEW.....	2
SECTION II: SITE INFORMATION	3
SECTION III: PROPOSED LEASE TERMS	3
SECTION IV. DOCUMENTS THAT ACCOMPANY THIS PROPOSAL.....	4
■ A List of Three References	
■ Disclosure of Beneficial Interest Form	
■ Certificate of Non-Collusion and Tax Compliance	
■ Certificate of Authority (<i>Not applicable, the Foundation is not a Corporation</i>)	

Executive Summary

The Lyndon Paul Lorusso Charitable Foundation of 2002, a Massachusetts charitable trust (the "Foundation") is pleased to submit this proposal in response to the Barnstable Fire District's (the "District") Request for Proposal for a lease-to-purchase agreement for administrative office space. Our proposed property meets and exceeds the District's requirements, offering an immediate, functional, and expandable solution for the Water Department's (the "Department") immediate relocation and long-term needs.

SECTION I: PROPERTY OVERVIEW

The Foundation's property site is located at 255 Breed's Hill Road, Barnstable (Hyannis), Barnstable County, Massachusetts 02601 and contains approximately 2.06 acres of land (the "Property"). The Property includes one single-story 1,904 sq. ft. office building, with 1,776 sq. ft. of usable office space (the "Building"). The size of the Property provides potential expansion opportunities for the Building to accommodate the Department's future growth.

The Property currently has six (6) parking spaces in front of the Building and provides ample space to accommodate additional parking, if needed. The property includes a large adjacent, uncovered gravel lot perfect for additional parking and the storage of the Department's service vehicles and additional equipment. The Property is located approximately ¼ mile from the Barnstable Fire District Well Site 2 and less than ½ mile from Well Site 5. Please see Exhibit A attached to this proposal for location views showing the distance from the Property and Well Sites 2 and 5.

SECTION II: SITE INFORMATION

General Requirements.

Proximity to Barnstable Fire District well site(s)	<ul style="list-style-type: none"> • .25 miles from Well Site #2 (402000-02G). • .37 miles from Well Site #5 (4020000-05G).
Lot Size and Conditions	<ul style="list-style-type: none"> • Lot Size: 2.06 Acres. The size of the lot provides the Town with space for potential expansion of the building and garage. • Building: Single-story, 1,904 sq. ft. office building, with 1,776 sq. ft. of usable office space. • Garage. Single-story garage containing approximately 500 sq. ft. • Lot Conditions. The Property features minimal vegetation, with limited shrubbery, and includes a large gravel lot.
Number of Offices	<ul style="list-style-type: none"> • Four (4) dedicated offices with one conference room that can accommodate up to 15 people. • Reception area with working space for two (2) employees and a visitor waiting area which includes a full length couch and chairs
Main Floor Bathrooms	Two (2) bathrooms located on the ground floor of the Building.
Parking	Six (6) parking spaces directly in front of the Building. The large gravel lot on the Property offers the ability for additional parking.
Leasehold Improvements	The Foundation will allow leasehold improvements at the Town's expense.

SECTION III: PROPOSED LEASE TERMS

- Description of Lease Terms. Two-year lease term, with one (1) 12-month extension option. The Department will be responsible for payment of all real estate taxes and operating costs for the property, in addition to the annual rent in accordance with the Price Summary form. The Department may purchase the Property at any time during the lease term, with all prior rent payments credited toward the final purchase price.
- If this proposal is accepted, the Foundation agrees to deliver possession of the Property, in "as is" condition, within 30 days after execution of a mutually accepted lease agreement.

SECTION IV. DOCUMENTS THAT ACCOMPANY THIS PROPOSAL

- **A List of Three References**
- **Disclosure of Beneficial Interest Form**
- **Certificate of Non-Collusion and Tax Compliance**
- **Certificate of Authority (*Not applicable, the Foundation is not a Corporation*)**

EXHIBIT A

Massachusetts Well Location Viewer Web Map



7/22/2025

Well Location Viewer Data 4 26 23

Monitoring

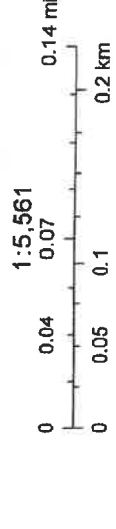
Groundwater - Open Loop

Public Water Supply Source: MassGIS - MWDGP PT MassGIS_Lever_Parish_20250521 MassGIS_Summary

Base Stress with Labels

Community Groundwater Well

MassGIS_BaseMap_Top_Detailed_L3_20250704



Massachusetts Well Location Viewer Web Map



7/22/2025

Well Location Viewer Data 14 26 23

- Monitoring
- Geothermal - Open Loop

Public Water Supply Source: MassGIS - PWASDEP PT

- Community Groundwater Well
- Base, Street, Veto, Labels

MassGIS - Elevation, Topo, Detailed, L3, 20250704

- Red: Band_1
- Green: Band_2
- Blue: Band_3
- Red: Band_1
- Green: Band_2
- Blue: Band_3

1:5,561

0 0.04 0.07 0.1 0.14 mi
0 0.05 0.1 0.2 km

MassGIS

LIST OF REFERENCES

- 1) Hemenway & Barnes, LLP**
John J. Siciliano, Esq.
75 State Street, Suite 1600
Boston, MA 02109
Telephone: (617) 557-9729
Email: jsiciliano@hembar.com

- 2) First Property Management**
Devin Witter
167 Lovell's Ln
Marstons Mills MA 02648
Telephone: (508) 776-0244
Email: Devin@fpmcapecod.com

- 3) Cape Cod Hospital**
Mike Bastianich
88 Lewis Bay Road
Hyannis, MA 02601
(Telephone) 774-487-6290
Email: mbastianich@capecodhealth.org

DISCLOSURE OF BENEFICIAL INTEREST FORM

INSTRUCTION SHEET

NOTE: The Division of Capital Asset Management and Maintenance (DCAMM) shall have no responsibility for insuring that the Disclosure Statement has been properly completed as required by law. Acceptance by DCAMM of a Disclosure Statement for filing does not constitute DCAMM's approval of this Disclosure Statement or the information contained therein. Please carefully read M.G.L. c. 7C, s. 38 which is reprinted in Section 8 of this Disclosure Statement.

Section (1): Identify the real property, including its street address, and city or town. If there is no street address then identify the property in some other manner such as the nearest cross street and its tax assessors' parcel number.

Section (2): Identify the type of transaction to which this Disclosure Statement pertains --such as a sale, purchase, lease, etc.

Section (3): Insert the exact legal name of the Public Agency participating in this Transaction with the Disclosing Party. The Public Agency may be a Department of the Commonwealth of Massachusetts, or some other public entity. Please do not abbreviate.

Section (4): Insert the exact legal name of the Disclosing Party. Indicate whether the Disclosing Party is an individual, tenants in common, tenants by the entirety, corporation, general partnership, limited partnership, LLC, or other entity. If the Disclosing Party is the trustees of a trust then identify the trustees by name, indicate that they are trustees, and add the name of the trust.

Section (5): Indicate the role of the Disclosing Party in the transaction by checking one of the blanks. If the Disclosing Party's role in the transaction is not covered by one of the listed roles then describe the role in words.

Section (6): List the names and addresses of every legal entity and every natural person that has or will have a direct or indirect beneficial interest in the real property. The only exceptions are those stated in the first paragraph of the statute that is reprinted in Section 8 of this Disclosure Statement. If the Disclosing Party is another public entity such as a city or town, insert "inhabitants of the (name of public entity)." If the Disclosing Party is a non-profit with no individual persons having any beneficial interest then indicate the purpose or type of the non-profit entity. If additional space is needed, please attach a separate sheet and incorporate it by reference into Section 6.

Section (7): Check "NONE" in the box if none of the persons mentioned in Section 6 is employed by DCAMM or an official elected to public office in the Commonwealth of Massachusetts. Otherwise list any parties disclosed in Section 6 that are employees of DCAMM or an official elected to public office.

Section (8): The individual signing this statement on behalf of the Disclosing Party acknowledges that he/she has read the included provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts.

Section (9): Make sure that this Disclosure Statement is signed by all required parties. If the Disclosing Party is a corporation, please make sure that this Disclosure Statement is signed by a duly authorized officer of the corporation as required by the statute reprinted in Section 8 of this Disclosure Statement.

DCAMM's acceptance of a statement for filing does not signify any opinion by DCAMM that the statement complies with applicable law.

This completed and signed Disclosure Statement should be mailed or otherwise delivered to:

Deputy Commissioner for Real Estate
Division of Capital Asset Management and Maintenance
One Ashburton Place, 15th Floor, Boston, MA 02108

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

- (1) REAL PROPERTY: 255 Breed's Hill Road, Barnstable (Hyannis), Massachusetts 02601
- (2) TYPE OF TRANSACTION, AGREEMENT, or DOCUMENT:
Request for Proposals for Lease-To-Purchase of Real Estate for Water Department Use
- (3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:
Barnstable Fire District and Barnstable Fire District Water Department
- (4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY:
Lyndon Paul Lorusso Charitable Foundation of 2002, a Massachusetts Charitable Trust
- (5) ROLE OF DISCLOSING PARTY (Check appropriate role):

☒ Lessor/Landlord ☐ Lessee/Tenant
☐ Seller/Grantor ☐ Buyer/Grantee
☐ Other (Please describe): _____

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

<u>NAME</u>	<u>RESIDENCE</u>
<u>Paul Lorusso</u>	<u>366 Blacksmith Shop Rd, E. Falmouth, MA 02536</u>
<u>Sam Lorusso</u>	<u>45 Vineyard St., E. Falmouth, MA 02536</u>

(See attached page for additional names)

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

☒ NONE

<u>NAME:</u>	<u>POSITION:</u>
_____	_____
_____	_____
_____	_____

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

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

writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

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

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

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

Lyndon Paul Lorusso Charitable Foundation of 2002
PRINT NAME OF DISCLOSING PARTY (from Section 4, above)

 07.23.2025
AUTHORIZED SIGNATURE of DISCLOSING PARTY DATE (MM / DD / YYYY)

Michael J. Puzo, as Trustee, and not individually
PRINT NAME & TITLE of AUTHORIZED SIGNER

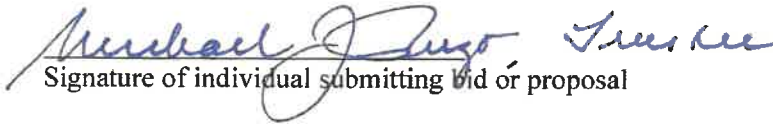
DISCLOSURE OF BENEFICIAL INTEREST FORM (Continued)

<u>NAME</u>	<u>RESIDENCE</u>
<u>Holly Harney</u>	<u>P.O. Box 961209, Boston, MA 02196</u>
<u>Julene Augusta</u>	<u>P.O. Box 961209, Boston, MA 02196</u>
<u>Michael J. Puzo</u>	<u>75 State Street, Ste 1600, Boston, MA 02109</u>

ATTACHMENT C

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.


Signature of individual submitting bid or proposal

Lyndon Paul Lorusso Charitable Foundation of 2002
Name of business

TAX COMPLIANCE CERTIFICATION

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


Signature of person submitting bid or proposal

Lyndon Paul Lorusso Charitable Foundation of 2002
Name of business

**NOT APPLICABLE, RESPONDENT IS
NOT A CORPORATION**

CERTIFICATE OF AUTHORITY

I, _____, certify that I am _____
_____ of the Corporation named as Bidder, Proposer, or
Respondent in the within Bid or Proposal Form that _____ who
signed said Bid or Proposal Form on behalf of the Bidder, Proposer, or Respondent was then _____
_____ of said Corporation; that I know his
signature hereto and that said Bid or Proposal Form was duly signed, sealed, and executed for
and on behalf of said Corporation by authority of its Board of Directors.

(Corporate Seal)

(Signature)

(Title)

This Certificate must be completed where the Bidder, Proposer, or Respondent is a Corporation, and should be so completed by its Clerk. In the event that the Clerk is the person signing the Bid or Proposal on behalf of the Corporation, this Certificate must be completed by another Officer of the Corporation.

ATTACHMENT B
PRICE SUMMARY

*** ENCLOSE IN A SEPARATE ENVELOPE MARKED "PRICE PROPOSAL" ***

RFP: Temporary Relocation of Water Department with Lease to Own Option

PRICE PROPOSAL

Lyndon Paul Lorusso Charitable Foundation of 2002
(Print Name of Proposer)

255 Breed's Hill Road, Barnstable (Hyannis), Massachusetts 02601
(Address of Proposed Site)

Size of Property: 2.06 Acres
1,904 Sq. Ft. (total)
1,776 Sq. Ft. (usable).

Price of Annual Rent for the Term (including any extension terms):

\$ 127,680 [Years 1 & 2 - \$42,000 per year
Year 3 Extension - \$43,680 per year]
Write in Numbers

One Hundred Twenty-Seven Thousand Six Hundred Eighty Dollars
Write in Words

Total Purchase Price of Property:

\$ 1,400,000
Write in Numbers

One Million Four Hundred Thousand Dollars
Write in Words

Will the Proposer allow for rent payments to be put towards the purchase price of the building?
(Please only check one)

YES ☒

NO ☐

Most Recent Appraised Value (if available): \$ 1,150,000
(as of 8/6/2021)