



62 PACKARD STREET HOUSING

THE HUDSON MUNICIPAL AFFORDABLE HOUSING TRUST

APRIL 12, 2021

REQUEST FOR PROPOSALS



CONTACT

Jennifer Van Campen

ADDRESS

Metro West Collaborative Development
79-B Chapel Street | Newton, MA 02458

E: jvc@metrowestcd.org

T: (617) 923-3505

WEBSITE

<https://metrowestcd.org/>



TABLE OF CONTENTS

1	DEVELOPMENT TEAM	5
	• Development Team Narrative	7
	• Organizational Structure of Development Team	9
	• Development Team Firm Profile	10
2	DEVELOPMENT CONCEPT	31
	• Development Description	33
	• Construction Staging Plan.....	36
	• Energy Efficiency and Sustainability.....	37
	• Project Financing Plan and Potential Financial Resources.....	40
	• Projected 10-Year Operating Budget.....	46
	• Letter Of Interest- Equity Loan	47
	• Letter Of Interest- Permenant Loan	49
	• Letter Of Interest- Construction Loan.....	51
3	CONCEPTUAL DESIGN DRAWINGS	55
4	MANAGEMENT PLAN	73
5	IMPLEMENTATION PLAN AND TIMELINE	77
6	SCORING MATRIX	81

REQUIRED PROPOSAL CONTRACT FORMS 87

• Exhibit A- Proposal Signature Page.....	89
• Certificate of Vote.....	91
• Addendum #1 Acknowledged.....	92
• Addendum #2 Acknowledged.....	95
• Exhibit B- Exceptions	97
• Summary of Comments on The Proposed P&S and LDA	98
• Exhibit C- Certificate of Non-Collusion	99
• Exhibit D- Certificate of Tax Compliance.....	100
• Exhibit E- Certificate of Authority.....	101
• Exhibit F- Debarment Disclosure From Development.....	102

APPENDIX 103

• Metro West Collaborative Development.....	105
• New Seasons Development, LLC.....	113
• Anser Advisory, LLC.....	121
• Maloney Properties, Inc.	134
• Davis Square Architects, Inc.	150
• L.D. Russo, Inc.	167
• BLW Engineers, Inc.	178
• RWM Engineering, Inc.	188
• Nitsch Engineering, Inc.	190
• RBLA Design, LLC.....	196
• New Ecology, Inc	212
• Klein Hornig, LPP	223

1

Development Team

- Development Team Narrative
- Organizational Structure of Development Team
- Development Team Firm Profile

DEVELOPMENT TEAM NARRATIVE

Metro West Collaborative Development is pleased to present this proposal for the redevelopment of Packard Street in the hopes of becoming your partner in:

- Finetuning the design with local boards and committees
- Seeking financing and permitting approvals for the project
- Long term stewardship of this important community asset

With this project, we look forward to becoming a long-term member of the neighborhood, committed to this and other future community development efforts that improve the lives of low and moderate income households in Hudson.

Our development team brings an exceptional level of experience and expertise to the Packard Street Project. Metro West Collaborative Development, founded in 1991, is a regional community development corporation and as such is always looking for opportunities to help affordable housing advocates within the 22 towns we serve to accomplish their affordable housing production goals. We meet regularly with Housing Partnerships and Trusts, other non-profit organizations, municipal planning and housing staff and community leaders to identify potential housing projects, programs or policies. Metro West CD has developed 73 units of affordable housing and has 92 units currently in our construction pipeline. In addition to real estate development, Metro West CD responds to over 3,000 calls each year from individuals and families with housing questions or crises. Metro West CD also works with private developers and municipalities throughout eastern Massachusetts in their

efforts to comply with local and state affordable housing regulations. Metro West CD is a DHCD and MassHousing approved Affordable Housing Monitor and Lottery Agent.

Metro West CD's Herring Brook Hill in Norwell is very similar to the Packard Street Project. The site was home to the Old Police Station at 40 River Street. Through a robust community engagement process, the Norwell Community Housing Trust was able to convince Town Meeting Members to provide the land and Community Preservation Act funding for the creation of 18 rental units on the site. They developed a Request for Proposals and selected Metro West CD to enter into an Option to Purchase Agreement in 2016. By December 2019, Metro West CD was leasing units. The project utilized a Comprehensive Permit and significant Dept. of Housing and Community Development subsidy sources as well as a private mortgage from Eastern Bank. Herring Brook Hill LLC, a subsidiary of Metro West CD, continues to own and operate the building.

Please see the Appendix for a brief description of all Metro West CD projects.

Additional team members include:

- New Seasons Development LLC (WBE) will serve as the development consultant and brings significant experience with the Low Income Housing Tax Credit program, DHCD funding sources and the comprehensive permit process.
- Davis Square Architects, the architects, bring wonderful



vision, significant DHCD experience and unique insights into this specific site.

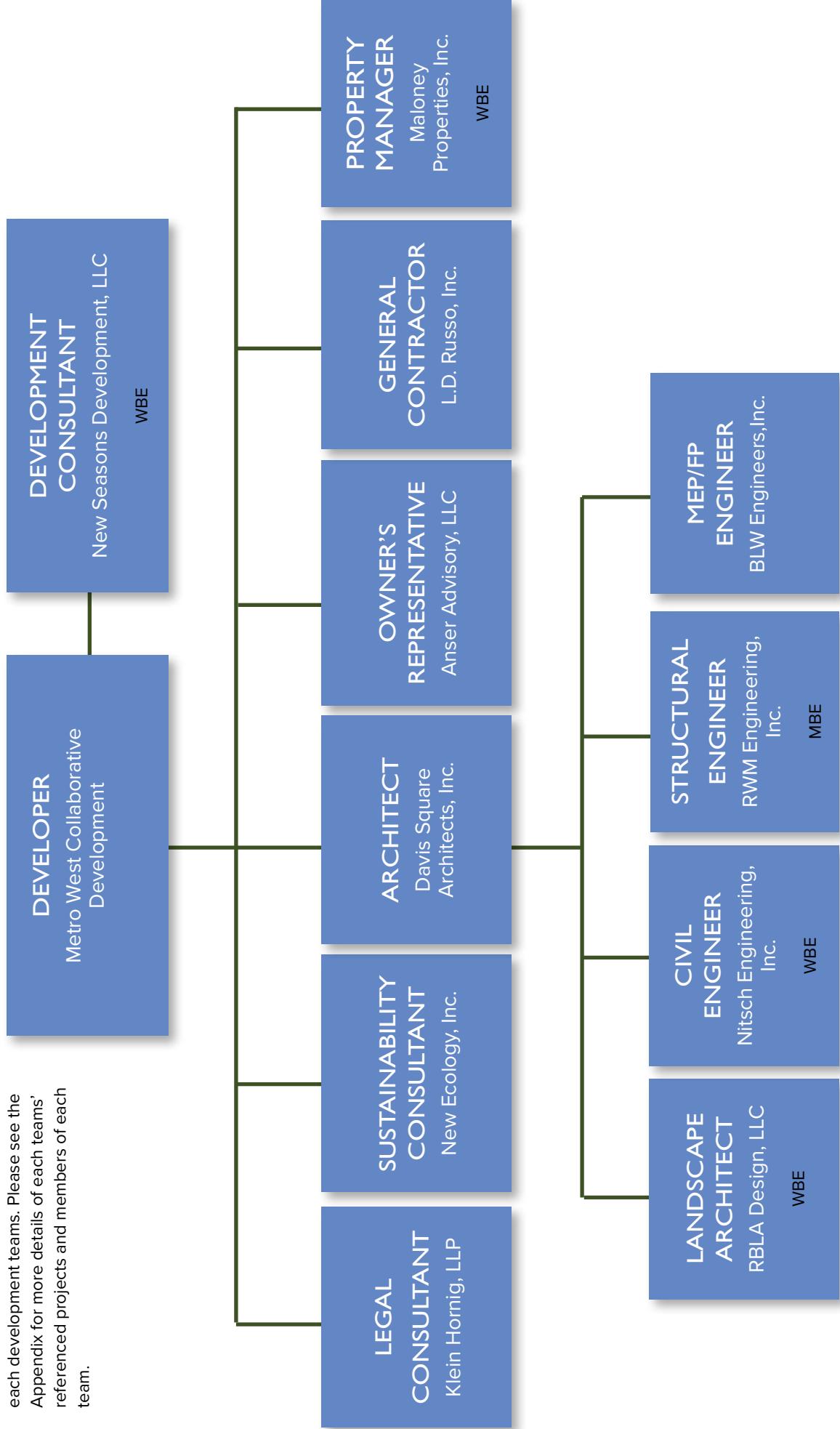
- Anser Advisory, the owner's representative, will assist in ensuring construction is seamless.
- LD Russo is a General Contractor with significant experience building affordable housing for projects funded by DHCD and recently worked with Metro West CD on its 236 Auburn St. project in Newton.
- Maloney Properties (WBE) is one of Massachusetts's leading affordable housing property managers. Their expertise in working with local nonprofits will be invaluable in the management of this project. They currently manage the majority of Metro West CD units.
- Klein Hornig is a premier affordable housing law firm that has worked with Metro West CD for more than 10 years.
- Other technical advisors will include: New Ecology performing sustainability assessments, RBLA Design (WBE) as the landscape architect, Nitsch Engineering (WBE) as the civil engineer, RWM Engineering (MBE) as the structural architect, and BLW Engineers and the MEP/FP sub consultant.

All team members are leaders in their respective fields and have worked on numerous similar projects. Furthermore, many of the team members have collaborated on prior projects together. None have any past, pending or threatened legal actions that would impact the team's ability to complete the project. None have any local, state or federal taxes due or outstanding.

We appreciate this opportunity to share our vision with you. Thank you for your consideration.

ORGANIZATIONAL STRUCTURE OF DEVELOPMENT TEAM

Diagram below is the organizational structure of the development team. The following pages are the firm profiles of each development teams. Please see the Appendix for more details of each teams' referenced projects and members of each team.



Metro West Collaborative Development

Metro West CD, formerly known as Watertown Community Housing, is a private non-profit corporation founded in 1991 to address the shrinking supply of affordable housing in Watertown and now the Metro West region of Boston. The mission of Metro West CD is to organize residents, mobilize resources, and identify ideas that improve the quality of life for residents of Metro West communities. We accomplish this mission by creating and preserving affordable homes; supporting economic development that strengthens neighborhoods, towns, and our region; and by building alliances with partners and constituencies throughout the region in order to increase awareness and build support for community development.

Metro West CD's recent accomplishments include:

- ✓ Beginning construction on Glen Brook Way Phase I in August 2020, a 48-unit family rental development. The two Glen Brook Way phases are the result of significant support from the Town of Medway which provided a comprehensive permit for a total of 92 units as well as \$2 million in local financial support (\$1 million for each phase). Phase II, GBW Senior Apartments, is seeking an allocation of Low Income Housing Tax Credits and other subsidy sources from DHCD.
- ✓ Responding to the Covid-19 crisis by providing program design and implementation services to eight public and private sources of funds to launch Emergency Rental Assistance Programs. Together over \$3.8 million has been pledged to these efforts and have served, to date, 354 households.
- ✓ Winning the competitive bid process to develop 18 units of rental housing for seniors in Norwell, which was awarded its comprehensive permit in July 2017, broke ground in April 2018, and was fully occupied by January 2020.
- ✓ Developing eight units of affordable housing in Newton on behalf of our community partners CAN-DO and the Barry Price Center. This project was complete and occupied in March 2020.
- ✓ Winning a contract to provide affordable housing services to a consortium of five municipalities in the Hudson area, which has grown to include four additional communities.
- ✓ Supporting 3,500 households participating in our Ready Renter Program, which provides regular information on waitlist openings, lottery announcements and other affordable housing opportunities.
- ✓ Providing affirmative marketing and lottery administration to projects in 20+ municipalities in Greater Boston.
- ✓ Offering 55+ and Ready to Move workshops, in partnership with area Councils on Aging, for seniors who are thinking about downsizing but don't know where to begin.



Wendy Cohen Biography

Wendy Cohen is the President and Managing Member of New Seasons Development LLC (NSD). She is a graduate of Oberlin College with a B.A. in Economics and Women's Studies and a Master of Public Policy degree from Harvard University's Kennedy School of Government.

Wendy started out in her career as a permanent lender at Massachusetts Housing Partnership Fund ("MHP"), a quasi-public state agency that funds affordable and mixed income housing projects, including Chapter 40B projects. MHP is an issuer of project eligibility letters. She was a member of MHP's lending team for over 11 years, in a progression of roles from lending assistant, to loan officer, to senior lender, and finally to Deputy Director of Lending. She is knowledgeable and experienced in all aspects of multi-family housing finance and lending.

Wendy was a developer in two periods, as a project manager at CASCAP, Inc. in Cambridge in the late 1990's after graduating from the John F. Kennedy School, and as Director of

Housing Development for the Allston Brighton CDC after leaving MHP as the Deputy Director of Lending in 2007.

In 2008, Wendy took the position of Director of the Low Income Housing Tax Credit (LIHTC) for the Commonwealth of Massachusetts' Department of Housing and Community Development (DHCD), where she was responsible for the allocation of 9% and 4% LIHTCs. She oversaw program compliance for over 40,000 tax credit units in the MA portfolio. Wendy also managed the allocation and disbursement of funds under the Tax Credit Assistance Program and the Section 1602/"Tax Credit Exchange" Program and oversaw the asset management of the 32 projects that were assisted under these American Recovery and Reinvestment Act programs. She remained in this position and underwrote and assisted hundreds of affordable housing projects in this capacity, until 2014 when she launched New Seasons.

While at DHCD, Wendy also participated as a representative of DHCD on the interagency committee in which many Chapter 40B policy matters faced by one or all of the state subsidizing agencies are discussed. She is familiar with the Chapter 40B rental housing cost certification guidelines (LIHTC and non-LIHTC) as well as the Chapter 40B Comprehensive Permit Guidelines and standards for economic feasibility. In addition to site eligibility application review, she has reviewed final approval requests and 40B cost certifications in her capacity as LIHTC Director.

Since starting New Seasons Development LLC in 2014, Wendy has focused her development consulting work on helping both non-profit and for-profit developer clients in the preservation and production of both family and elderly housing projects located in several neighborhoods of Boston, and in Arlington, Brockton, Chicopee, Lawrence, Lowell, Merrimac, Peabody, Salem, Salisbury, and Taunton, among other communities.

New Seasons Development LLC is a woman-owned business enterprise certified by the Commonwealth of Massachusetts' Supplier Diversity Office.



Anser Advisory is a national capital program and project advisory firm that offers innovative solutions tailored to our clients' needs. Our services begin with early phase strategic organizational and financial planning and continue through managing the tactical execution of each project.

We operate nationally from offices in [California](#), [Colorado](#), [Florida](#), [Massachusetts](#), [New Jersey](#), [New York](#), [Ohio](#) and [Pennsylvania](#).

Contact

Tom O'Neil
Managing Director
617.445.3555 x303
tom.oneil@anseradvisory.com



Housing Services Overview

- Program Management
- Project Management
- Development Consulting
- Financial Feasibility
- Deal Structures and Acquisitions
- Compliance Support
- Procurement Support
- Feasibility Studies
- Zoning and Permitting Coordination
- Design Programming
- Construction Management
- Project Controls
- Coordination of Mixed-use, Multi-phase Developments
- Document Control
- Technical Writing
- Legal/Regulatory Review
- CAD / BIM Services
- Draw Requests and Financial Reporting
- Permanent Loan Conversions
- Funding Applications and Closing Coordination

ANSERADVISORY.COM

ABOUT US



Maloney Properties, Inc. opened for business on May 1, 1981, to provide professional property management services to community-based housing owners who are committed to the interests and well-being of the resident population that the housing serves. Since then, Maloney Properties has emerged as a leading women-owned firm working in communities throughout New England.

Our executive staff works collaboratively with each client to achieve their goals while providing excellence in property and asset management. Our highly qualified team of professionals will work closely with you to understand your objectives and execute a plan to achieve them. In our long-term relationships with our clients these goals have grown, changed and shifted over time. What has remained constant is our commitment and our standard for excellence.

Our work in the multifamily housing business is well known and respected. We pride ourselves on the ability to think creatively, create lasting partnerships, and bring excitement to both new and existing projects.

We are proud of our diverse workforce and our work in the community. Our outreach in recruitment has ensured that our staff members represent the communities in which we work. With our workforce of over 400 employees, 52% of whom are Asian, African-American, and Latino we are able to provide management services that reduce or eliminate cultural and linguistic barriers. Maloney Properties is a certified Women Business Enterprise (WBE). In addition, 20% of the company is minority-owned.



FIRM PROFILE



We are an award-winning architectural design and planning studio with a simple mission: to create excellent design, to develop long-term relationships with clients, and to help build viable communities.

OUR CURRENT AREAS OF EXPERTISE INCLUDE:

- Multi-family housing
- Renovation and historic preservation
- Transit-oriented design
- Feasibility and needs assessment
- Commercial and corporate interiors
- Childcare centers
- Community spaces
- Learning spaces

PRINCIPALS:

- Clifford J. Boehmer, AIA
- Ross A. Speer, AIA
- Iric L. Rex, AIA, LEED AP



Founded in 1984, Davis Square Architects, Inc. is a medium-sized firm organized into project-specific teams. We maintain the same team from schematic design through construction, under the direction of a Principal. As a result of this continuity, our clients come to know and rely on individual staff members over time, seeking them out for subsequent projects.

Our best work is achieved in collaboration with demanding, involved clients. Design solutions evolve through careful consideration of our clients' needs, constraints, and dreams.

To this we add a commitment to architecture that is both beautiful and respectful of its surroundings.

Working within the design studio tradition, we have created an open collegial work environment where education is highly valued; where the exchange of ideas, informed by experience, is encouraged; and where the most advanced technology supports the design process. Our success has allowed us to contribute a portion of our profits to worthy community service organizations, in the belief that strong communities and great architecture are mutually dependent. ■

FIRM PROFILE

davissquarearchitects.com

Firm Profile

L.D. Russo, Inc. is a General Contracting and Construction Management firm based in Harvard, MA. The company was founded in 1977 by Lou Russo. Nat Coughlin, Lou's son-in-law, joined the company in 2006 and in 2020 took over as President of the company. In addition to General contracting, the company has a sitework division which performs the earthwork, utility, and other sitework services for the company's construction projects. Also, the company has been a developer of commercial and affordable housing properties.

L.D. Russo has been building affordable housing for projects funded by DHCD and LIHTC for a very long time, with over 500 affordable units built or renovated in over 20 different projects. L.D. Russo, Inc. has earned a good reputation at DHCD, and that reputation is incredibly important to us to sustain with every project.

In addition to working as a contractor, we have participated in the development of LIHTC projects in Leominster, Harvard, Newburyport, and Salisbury.

L.D. Russo, Inc. is pre qualified for bonding up to \$30 Million for a single project and a \$40 Million Aggregate.

Disclosures:

- 1) Disclosure of any legal or administrative actions past, pending or threatened. **NONE**
- 2) Confirmation that no local, state or federal taxes are due and outstanding for the development team or any constituent thereof. **CONFIRMED—NONE.**



L.D. RUSSO
General Contracting • Construction Management





COMPANY BACKGROUND

BLW Engineers, Inc.

311 Great Road
P.O. Box 1551
Littleton, MA 01460

Tel: 978.486.4301
Fax: 978.486.0067

Year Established: 1999

Year Incorporated: 1999

Years in Business: 22

OFFICERS OF THE FIRM

Kenneth R. Beck, P.E., LEED AP, MCPPO, Principal	978.486.4301 x 13
William J. Scanlon, P.E., Principal	978.486.4301 x 14
John C. Pierga, P.E., Principal	978.486.4301 x 15
Michael J. Denommee, P.E., LEED AP, Principal	978.486.4301 x 83
Erik Gath, P.E., Associate Principal	978.486.4301 x 72
Daki Koutouvides, P.E., Associate Principal	978.486.4301 x 94

SIZE OF FIRM

MECHANICAL ENGINEERS: 29 ELECTRICAL ENGINEERS: 14 CAD DESIGNERS: 4 OFFICE PERSONNEL: 4

PERSONNEL

Principals/Owners	Kenneth R. Beck, P.E., LEED AP, MCPPO, Principal William J. Scanlon, P.E., Principal John C. Pierga, P.E., Principal Michael J. Denommee, P.E., LEED AP, Principal Erik Gath, P.E., Associate Principal Daki Koutouvides, P.E., Associate Principal
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Mechanical	Kenneth R. Beck, P.E., LEED AP, MCPPO, Principal William J. Scanlon, P.E., Principal Erik Gath, P.E., Associate Principal Vincent Salemi, Engineer Wayne Forte, CAD Designer David Scibilia, Engineer Daniel Crory, Engineer John Pugh, P.E., Engineer Rebekah Drehman, Engineer Jeffrey Fleishman, Engineer Brian Bourgeois, Engineer Belinda Vuto, Engineer Christopher Wilk, Engineer Alec Nicotra, Engineer Nick Kapuscinski, Engineer John Benham, Engineer Dylan Thombs, Engineer Kyle Klahre, Engineer
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BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, MA 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



COMPANY BACKGROUND

Plumbing/Fire Protection

Michael J. Denommee, P.E., LEED AP, Principal
David Catanzaro, Senior Engineer
Christopher Gada, Engineer
Cedric Mukania, Engineer
George Baberkov, Engineer
Leo Enrico, Engineer
Keith Young, Engineer
Tyler Allen, Engineer
Joshua A. Ritchie, Engineer
Justin Keene, Engineer
Dustin White, Engineer
Paul Danyliw, Engineer

Electrical

John C. Pierga, P.E., Principal
Daki Koutouvides, P.E., Associate Principal
Michael Gagne, Senior Engineer
Scott Daigneault, Engineer
Chadwick Nelson, Revit Designer
Joseph Saint Germain, Engineer
Mark Brodeur, Engineer
David Fitzgerald, Senior Engineer
Shane Wiebe, Designer
Juandiego Gonzalez, Engineer
Joshua Pierga, Designer
Jeremy Careau, P.E., Senior Engineer
Kevin Vanderhoof, Engineer
Chuck Mace, P.E., Senior Engineer
Jeffrey Martin, Engineer
Ethan Rong, Engineer
Jorge A. Elias, Engineer

Administration

Donna Hagens, Operations/Accounting
Maria Fini, Administrative Assistant
Beth Grande, Administrative Assistant
Lauren Opie, Administrative Assistant

OUR ENGINEERING SERVICES

- Feasibility Studies
- Analysis for Existing Facilities
- Energy Conservation/Green Build
- Engineered Designs:
 - Heating, Ventilating and Air Conditioning
 - Mechanical
 - Plumbing
- Construction Administration
- Project Management

- Fire Protection	- Telecommunications
- Electrical	- Security
- Life Safety	- Fire Alarm

BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, MA 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



COMPANY BACKGROUND

HISTORY AND EXPERIENCE

BLW Engineers is a consulting engineering firm providing design related services for HVAC, Plumbing, Fire Protection and Electrical building systems. Our services include feasibility studies, energy conservation evaluations, and engineered designs; cost estimating, construction administration and project management.

BLW Engineers, Inc. was founded in 1999 and has 51 employees, including electrical, mechanical, plumbing and fire protection engineers. BLW has extensive experience working within corporate environments and understands the special needs and time frames involved when working within occupied facilities. Our project managers are registered professional engineers that work on each project to ensure a complete and fully operable system will be provided.

Principals Kenneth R. Beck, William J. Scanlon, John C. Pierga and Michael J. Denommee have experience in the design of building systems for various size and types of projects. In addition, the firm is thoroughly experienced with the preparation of bidding documents for public bidding laws, including M.G.L. c.149 and c.30.

Kenneth R. Beck, Principal, William J. Scanlon, Principal and Erik Gath, Associate Principal are mechanical engineers and project managers for several multi-disciplined projects. Responsibilities include mechanical design, quality control, construction administration, client relations and personnel management.

John C. Pierga, Principal and Daki S. Koutouvides, Associate Principal are electrical engineers and project managers responsible for electrical engineering design, project coordination, construction administration and supervision and training of junior personnel.

Michael J. Denommee, Principal is a plumbing and fire protection engineer and project manager for several multi-disciplined projects. Responsibilities include plumbing and fire protection design, quality control, construction administration, client relations and personnel management.

Our Mechanical Engineering staff has extensive experience in the mechanical, plumbing and fire protection industry. The staff that will be assigned to this project will consist of a Project Manager, Senior Mechanical Engineer and additional mechanical engineers as needed. The Project Manager, Kenneth Beck is a Principal of the company with over 30 years of experience, is a Registered Professional Engineer in Massachusetts and is LEED Certified for green build projects. Ken will oversee design and will be involved through construction right up to the final inspection.

Our Electrical Engineering staff has extensive experience in the electrical lighting and power industry and is up to date on all the latest standards, codes and guidelines for the Electrical Industry. The staff that will be assigned to this project will consist of a Senior Electrical Engineer and additional electrical engineers as needed. John Pierga, a Principal of the company and a Registered Professional Engineer in Massachusetts with over 30 years of experience will oversee the electrical design through construction right up to the final inspection.

BLW is dedicated to providing engineering services of the highest quality, innovative solutions and attention to detail for large projects to the most intricate design plans. Our firm realizes the importance of providing complete and coordinated designs that focus on the particular project requirements in a professional setting with complete client satisfaction; our reputation depends on it.

BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, MA 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



RAYMOND W. McCRARY, P.E.

President

BACKGROUND

Raymond McCrary, president and founder of RWM Engineering, Inc. is responsible for the daily operations of the firm as well as project management and structural engineering. He has over 30 years of management, project management and structural engineering experience which includes the design of office and commercial buildings; bridges; corporate headquarters; micro-electronics manufacturing plants; laboratories, production and assembly centers; medical and education facilities; recreation facilities; religious facilities; correctional facilities; municipal buildings; water and wastewater facilities; bridges; multi-unit housing and warehouse/distribution complexes.

Prior to establishing RWM Engineering Inc. in 2007, Mr. McCrary was a principal at DMC Engineering Inc. At DMC, Raymond served as a Principal of the firm and Director of Engineering and was responsible for the overall technical and contractual management of DMC's projects. His responsibilities included determining project requirements and priorities; monitoring budgets and schedules; overseeing technical quality; fulfilling contract commitments; maintaining management throughout the course of the project; and interacting with clients. In addition Mr. McCrary also served as project manager or structural engineer on numerous projects. Mr. McCrary also served as a structural engineer for the firm of Symmes, Maini & McKee Associates for several years and was responsible for the structural design of numerous projects.

PROJECT EXPERIENCE

The following are a sampling of relevant projects Mr. McCrary has been involved in:

Indigo Block Residences, Boston, MA.

RWM Engineering, Inc. provided structural engineering services for the design of a new 80 unit, 87,743 sf residential building. The building is five wood framed stories over a steel framed podium level with slab on grade first floor over conventional spread footing foundations.

Stow Road, Harvard, MA.

RWM Engineering Inc. was retained by the prime Architect to provide structural engineering services for two new residential buildings. The buildings are two story conventional wood framed, slab on grade construction. The buildings are 4,000 and 4,800 sf.

Hudson Senior Center Addition, Hudson, MA.

RWM Engineering, Inc. was structural engineer for a 10,000 square foot addition and renovations to the senior center in the Town of Hudson, MA. The addition includes a 2,300 square foot multi-purpose room with a full basement, a new entry/reception area, kitchen and a 3-story stair/elevator tower linking the addition to the existing structure.

Residences at Highland Avenue, Chelmsford, MA

RWM Engineering, Inc. provided structural engineering services to the prime Architect for a two-story, 5,000 square foot, wood framed multi-unit residential building.

719 Washington Street, Boston, MA.

RWM Engineering, Inc. provided structural design of a new 12,900 sf, 3 story multi-unit residential building. The building is conventional wood framed structure.

EDUCATION – B.S.C.E., Northeastern University

PROFESSIONAL REGISTRATION – NH #10669, MD #28598, DC #PE900837, VA #038560, MA #45390



Temple Landing
New Bedford, MA



One Canal
Boston, MA



Woodrow Wilson Court
Cambridge, MA



Orient Heights
Boston, MA

Building better communities with you

Nitsch Engineering is a multi-disciplined engineering and surveying firm offering an integrated suite of services to efficiently serve the needs of our building/site development and infrastructure clients. Our civil, transportation, and structural engineers; land surveyors; planners; and GIS specialists work collaboratively to deliver client-focused, creative, cost-effective, and sustainable project solutions. We have earned the confidence of our clients, as illustrated by the fact that 93% of our work comes from repeat clients.

For 30 years we have worked on major private development and public infrastructure projects in Massachusetts and throughout the northeast. Nitsch Engineering is the largest women-owned business enterprise (WBE) civil engineering firm in Massachusetts, and is also WBE-certified in Virginia.

Civil Engineering

Nitsch Engineering's professional engineers coordinate their efforts with architects, landscape architects, and owners to provide comprehensive solutions to site-development issues. Our proactive approach to addressing stormwater management, grading, site utility, and permitting issues allows us to identify and resolve potential problems before they become critical issues.

Transportation Engineering

Nitsch Engineering recognizes that the transportation elements of a project – including vehicle, bicycle, and pedestrian traffic – often set the tone for how a project is balanced in the surrounding environment. We perform traffic studies, prepare transportation master plans, and provide roadway design and permitting.

Structural Engineering

Bridges are an essential element of our nation's infrastructure, and Nitsch Engineering's structural engineers devise innovative, cost-effective, and sustainable solutions that keep our communities safe. Our staff are experienced in designing new bridges, rehabilitating older bridges, providing NBIS bridge inspection, and assessing bridge load rating.

Land Surveying

Nitsch Engineering works with each client to determine the appropriate scope of services and level of accuracy to meet the client's objectives, whether for a property line, topographic, title insurance, construction layout, laser scanning, or building survey.

Green Infrastructure

Using principles of biomimicry, ecohydrology, and ecological restoration, and often incorporating rainwater harvesting, Nitsch Engineering's integrated approach results in sites that more closely reflect natural ecological patterns than traditional engineering techniques, while accomplishing the program objectives.

Planning

Nitsch Engineering works with our clients to prepare feasibility studies and master plan documents that evaluate alternatives with the goal of providing the "best use" plan for the site and environmentally sound solutions. We identify potential impacts, obtain project approvals, manage public participation, and follow through with the permitting process.

GIS Services

Nitsch Engineering meets our clients' planning, engineering, and land surveying needs with Geographic Information Systems (GIS) technology. By overlaying many different site factors, GIS analysis can help simplify the planning process when complex site or land issues are involved.



Registered to practice in Massachusetts, New Hampshire, Connecticut and Rhode Island, Rebecca Bachand has been working in landscape architecture and civil engineering firms on small to large scale commercial projects since 1998. Her range of expertise encompasses feasibility studies, master planning, design, and permitting. Offering landscape architecture and permitting services to owners, municipalities, developers, architects, and civil engineers, at RBLA we personally follow projects through from inception to completion.

Our process begins with an assessment of existing site conditions to determine how the land will best be utilized, followed by a thorough analysis of the site's opportunities and constraints. Throughout the design process, we combine progressive ideas about stormwater management, water reclamation, use of native, low maintenance plants, and potential use of appropriate recycled and/or repurposed materials to maximize programming of our client's needs while engaging the site's natural features. As LEED Accredited Professionals, we work with clients to integrate LEED points and sustainable techniques into all projects.

Providing services to both public and private sector clients makes RBLA uniquely suited to projects soliciting public participation. We've completed projects with the communities of Marblehead, Beverly, Hamilton, and Stoughton, MA, redeveloping civic spaces for gathering, gardening, and play. In the City of Quincy, we developed Open Spaces overlooking the daylighted Town Brook after completion of the smelt run landscape installation. With a background in Therapeutic Landscape Design and Universal Accessibility, RBLA incorporates facets of these topics – strolling gardens with multi-season/multi-sensory plant palettes, contemplative labyrinths, semi-public gathering areas – into spaces for use by all generations and abilities.

We team with local architects, civil engineers, contractors, and allied professionals to provide development teams with an integrated design process. We believe that this partnership makes for a better project experience for all involved and streamlines the permitting and development processes. We are a Massachusetts certified Women Business Enterprise (WBE) and Disadvantaged Business Enterprise (DBE). We believe this status is a benefit to our clients, particularly in the affordable housing market.

Representative Clients

The Architectural Team: Mike Binette, mbinette@architecturaleteam.com

CICD of Boston: Donald Alexis, dalexis@cidcodboston.org

City of Boston, Parks Department: Cathy Baker-Eclipse, cathy.baker-eclipse@boston.gov

Davis Square Architects: Cliff Boehmer, CBoehmer@davissquarearchitects.com

Design Technique: Lee Sollenberger, lee@deztek.com

Development Synergies LLC: Peter Roche, pjroche1@comcast.net

Hearth, Inc.: May Shields, mshields@hearth-home.org

Joy Street Design: Sharon Gentges, sharon@joystdesign.com

JSA Architects: Jim Warner, jwarner@jsainc.com

LBC Boston: Margarita Kvacheva, margarita@lbcBoston.com

LCB Senior Living: Spencer Osborne, sosborne@lcbSeniorLiving.com

Mount Vernon Company: Eric Shinrock, eshinrock@mvernon.com

The Northbridge Companies: Wendy Nowokunski, wnowokunski@northbridgecos.com

Northland Residential: Peter Crabtree, pcrabtree@northlandresidential.com

Planning Office of Urban Affairs for the Archdiocese: Bill Grogan, whg@poua.org

Prellwitz Chilinski Architects: Dave Snell, dsnell@prellchil.com

PVI Site Design, LLC: Tim Power, P.E., tpower@pvisitedesign.com

Southborough, Town of, Recreation Department: Matt Cauchon, mcauchon@stoughton-ma.gov

Stoughton, Town of, Recreation Department: Tim Davis, tdavis@southboroughma.com

Traggorth Companies LLC: Dave Traggorth, dave@traggorthcompanies.com

WaypointKLA: Jim Mitrano, jamesmitrano@waypointKLA.com

Firm Profile

NEW ECOLOGY

WHO WE ARE

Founded in 1999, New Ecology, Inc. (NEI) is an innovative, nationally-recognized Green Building and Sustainable Design non-profit consulting firm. We work with our clients to develop and implement practical, cost-effective ways to reduce energy and water use, improve indoor air quality and occupant health, and make buildings more durable, resilient, and less costly to maintain.



"New Ecology has an amazing team of experts who optimize our systems by contributing to the efficient design of buildings, assisting with heating system upgrades, and applying for large energy rebate programs. We have worked with other energy consultants that are basically in the business to produce reports- New Ecology does much more than that- they are true partners in our efforts and go the extra mile to get it done right."

*~Frank Alvarez, Sr. Vice President,
Beacon Communities*

NEI has greened over 158,000 units of housing and helped owners articulate and achieve their sustainability goals in settings including schools, day care centers, health care facilities, office buildings and community centers. The common thread among these projects is that they are better buildings—for owners, for residents, for the environment—because of NEI's involvement.

WHAT WE DO

NEI's services include:

- Integrated Green Design
 - Charrette Facilitation
 - Peer Review
 - Contractor Training and Field Inspections
 - Life Cycle Cost Analysis
- Audits and Analysis
- Green Building Certification
 - HERS Rating
 - Energy Star
 - LEED
 - Enterprise Green Communities
 - Passive House
 - NGBS Green Verifier
- Renewable Energy
- Energy Modeling
- Remote Monitoring and Optimization
- Rebates and Incentives
- Operations and Maintenance Planning and Training
- Owners Representative Services



Bristol Commons

A demolition and 160-unit new construction of a residential development comprised of townhomes, duplex, apartment units and community center.

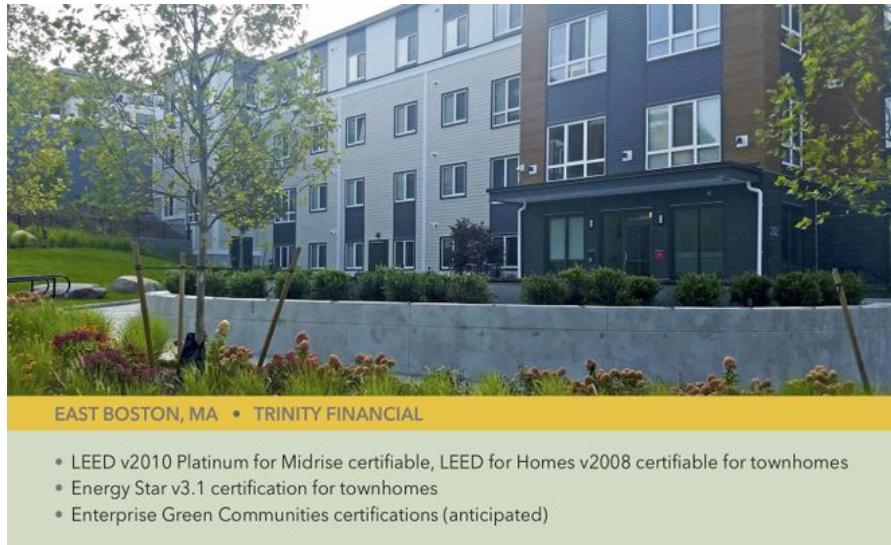
- 78% reduced utility costs vs. similar LEED Gold townhomes
- Near Passive House standards of air infiltration (0.84 ACH 50)
- Recipient of a \$22 million HUD Hope VI grant



Orient Heights

Phase 1 of the Orient Heights public housing site redevelopment includes an 88-unit midrise and four 8-unit townhomes.

- 32% projected total energy savings over ASHRAE baseline (midrise)
- 16,000 BTU/SF reduction in energy projected (midrise)
- Over \$215,000 in efficiency rebates



HOW WE GET RESULTS

NEI works as an integrated part of the project team, providing the technical expertise and capacity to ensure that the project achieves its sustainability and energy-efficiency goals in the most cost-effective and complementary way possible. We are constantly refining our knowledge and approach based on what we learn and the results we measure and achieve. We are not merely advisors; we do the actual work of ensuring that the team's green and sustainability goals are clear and well communicated, adequately documented, and built as designed. We are expert in achieving the highest certification levels attainable for a project and in qualifying for the maximum incentives and rebates. Whether the design team has chosen to build a conventional high performance building or to break new ground as an early adopter, the NEI team has a track record of delivering cost-effective results.

Introduction to Klein Hornig

Klein Hornig is one of the nation's premier firms concentrating exclusively on affordable housing and community development. The firm focuses exclusively on structuring, managing and closing affordable housing and community development projects. The attorneys at Klein Hornig have worked extensively with a wide variety of affordable housing programs and activities, including the low-income housing tax credit program, public housing and mixed-finance projects, the Choice Neighborhoods Initiative program, the Rental Assistance Demonstration (RAD) program, HOME and CDBG funding, tax-exempt mortgage revenue bonds, 501(c)(3) bonds, FHA-insured loans, Mark to Market restructurings and Section 236 IRP decoupling.

In addition to affordable housing, we are active in other community development activities, including commercial and mixed-use development using creative financing vehicles such as the New Markets Tax Credit program, historic tax credits, and renewable energy credits. We supplement our housing and community development practice with expertise in partnership and business associations, condominiums and cooperatives, nonprofit organizations and real estate law. We invite you to visit our website at www.kleinhornig.com to appreciate the range and depth of our work.

Klein Hornig has a single mission – to provide uncompromising service and unparalleled legal expertise to the affordable housing community. We know that the individuals and organizations that have dedicated themselves to developing, operating and preserving affordable housing and other community assets need lawyers as dedicated as they are—lawyers with command of every technical tool available, and with the understanding and commitment needed to apply those tools efficiently and creatively.

Klein Hornig has approximately 40 attorneys practicing locally and nationally out of offices in Washington, DC and Boston, Massachusetts. Using sophisticated technologies for communications, legal research and knowledge management, attorneys in the two offices can collaborate to provide the most efficient and effective legal services to our clients.

Massachusetts Experience

In Massachusetts, we have worked with every state and local affordable housing resource, including all of the DHCD funding programs, bond financing from MassHousing and MassDevelopment, state housing and historic tax credits, Community Preservation Act and local HOME funds, and beyond. In addition to our financing expertise, our practice focuses on the real estate matters that are essential to affordable housing development – title and conveyancing, zoning and permitting, construction contracts and

disputes, affordable cooperatives and condominiums, and purchase and sale transactions of all types. We have further experience and expertise with the specific set of rules and standards applicable to the activities of local housing authorities, their affiliates and their development partners – from the statutory requirements of Chapters 121B, 30B and 149 to the programmatic and policy activities of HUD, DHCD and other government bodies and stakeholders.

Because of our extensive work throughout Massachusetts, we are able to offer the benefits of both a national and a local practice in affordable housing and real estate. At any given moment we are at work on dozens of Massachusetts development projects involving numerous sources of financing and complex real estate development, permitting and construction matters.

Representative Transactions:

Sycamore on Main, 121 Main Street, Brockton, MA: Klein Hornig assisted our client, NeighborWorks Southern Mass (NWSOMA), close on the acquisition and construction financing of Sycamore on Main located at 121 Main Street in Brockton. Site has been permitted under Chapter 40R for 48-units of new construction rental housing and ground floor commercial space. Our client purchased the property from a tax foreclosed owned and involved negotiations with our seller and the City of Brockton to clear the tax lien case and vacate the foreclosure decree during the 1-year redemption period. Acquisition financing was provided by The LIFE Initiative and LISC. Construction financing included a taxable construction loan from Rockland Trust Company, permanent risk-share financing with MassHousing and subordinate workforce loan financing from MassHousing, assortment of MassDocs loans, 9% LIHTC and state LIHTC, and project-based Section 8 assistance.

Glen Brook Way, Medway, MA: We assisted client, Metro West Collaborative Development, close on the site assemblage in Medway, MA. Acquisition was financed by Boston Community Loan Fund (BCLF) and Community Economic Development Assistance Corporation (CEDAC). Site has been permitted under Chapter 40B for 48-units of new construction LIHTC rental project. Construction financing included a taxable construction loan from Eastern Bank, a permanent loan from Massachusetts Housing Partnership Fund Board (MHP), assortment of MassDocs loans, Town of Medway CPA and AHTF funds, 9% LIHTC and state LIHTC, and project-based Section 8, Section 811 and MRVP assistance.

Bancroft School Apartments, Auburn MA: In February 2021, KH closed on acquisition and construction financing for Bancroft School Apartments for our client, Pennrose Properties, LLC. This transaction involved the historic renovation and expansion of an old school building in Auburn, MA to create 60 affordable units for seniors.

Abby's House/52 High Street Project, Worcester MA: Klein Hornig assisted client, Abby Kelley Foster House, Inc. ("Abby's House"), close on the recapitalization and financing of the renovation of its 52 High Street project in Worcester, which upon completion, will provide safe and secure, affordable and

service-enriched housing for 55 women in the Greater Worcester area.

Abby's House partnered with existing client, Women's Institute for Housing and Economic Development ("WIHED"), with WIHED serving as its development partner. Financing included a tax-exempt bond issuance by MassDevelopment, construction bond financing from Eastern Bank, assortment of MassDocs loans (including the National Housing Trust Fund), state LIHTC and HTC loans, MHIC's equity investment in 4% LIHTC and federal historic credits, and project-based MRVP rental assistance.

St. Therese, Everett MA: In November 2020, Klein Hornig closed on construction financing for The Neighborhood Developers, Inc.'s St. Therese project. The project involves the redevelopment of a former church campus with a 77-unit senior building with approx. 7,000 SF of ground floor community service facility space which will be leased to East Boston Neighborhood Heath Center and used to provide "PACE" services to the residents and others. The senior building utilized a twinned LIHTC condo structure with delayed investor admission on both sides to preserve MA sales tax exemption. The health center space is a separate condo unit but is included in 4% basis and is collateral for the 4% senior debt, with the tax-exempt bond issued by MassDevelopment. The project also incorporates a pocket park and a 6-unit affordable homeownership townhouse component.

Coppersmith Village, East Boston MA: Klein Hornig helped Neighborhood of Affordable Housing (NOAH), close on the first phase (new construction of 56-units of mixed-income, mixed-use development) and second phase (15 mixed-income, for-sale townhomes) of the Coppersmith Village development in East Boston.

Whittier Street Redevelopment, Boston, MA: Klein Hornig assisted Preservation of Affordable Housing (POAH) on the acquisition and construction financing of Phase One of the Whittier Street Redevelopment, located in Boston, Massachusetts. Boston Housing Authority first issued this RFP in 2013, with POAH and another KH client, Madison Park Development Corporation (MPDC) being named co-developers in 2013. Klein Hornig represented POAH as primary developer counsel, helping to structure the transaction, including the CNI evidentiary process/submissions, permitting, title related matters, structuring a leasehold condominium structure with a 9% unit and 4% unit, and negotiating transaction terms with lenders, investors and other transaction participants.

Professional Team

Klein Hornig's professional team will include Wat Matsuyasu, Ross Pini and Stephanie Johnson.

Klein Hornig's professional team will be led by Senior Counsel, Wat Matsuyasu. Wat regularly assists both nonprofit and for-profit developers in the acquisition, development and refinancing of affordable housing and community development projects in Massachusetts.

Wat will be directly assisted by Boston associates Ross Pini and Stephanie Johnson. Ross and Stephanie will be the team member responsible for drafting, document control, research assistance and legal research, if required, document management and closing preparation.

In addition to our lawyers, we have highly skilled paralegals and legal assistants. While we have designated the above lawyers to be your primary contacts we understand that situations arise requiring additional support; accordingly, we are prepared to bring other attorneys to fill in or provide supplemental assistance at any time. This approach not only ensures that we are consistently providing our clients with the best service, but also protects from delays due to unexpected situations. Full resumes of each attorney listed have been included at the end of this response.

Klein Hornig maintains offices in Washington, DC and Boston, Massachusetts. Using sophisticated technologies for communications, legal research and knowledge management, attorneys in the two offices collaborate seamlessly to provide the most efficient and effective legal services to our clients. Klein Hornig has a skilled administrative staff and network for paralegal support. Klein Hornig employs detailed workload planning in order to ensure that it promptly addresses all project requirements and completes tasks ahead of schedule.

Our office locations are:

Washington, District of Columbia

1325 G Street NW, Suite 770

Washington, DC 20005

Tel: (202) 926-3400

Fax: (202) 926-3401

Boston, Massachusetts

101 Arch Street, Suite 1101

Boston, MA 02110

Tel: (617) 224-0600

Fax: (617) 224-0601

2

Development Concept

- Development Description
- Construction Staging Plan
- Energy Efficiency and Sustainability
- Project Financing Plan and Potential Financial Resources
- Projected 10-Year Operating Budget
- Letter of Interest - Equity Loan
- Letter of Interest - Permanent Loan
- Letter of Interest - Construction Loan

DEVELOPMENT DESCRIPTION

Our proposal creates 40 new units of affordable rental housing at the former Hudson police station site at 62 Packard Street. The housing will be affordable to a variety of households with incomes up to 60% of the area median income (AMI), including a set aside for households with incomes up to 30% AMI. Our proposed design is a neighborhood-scale project that balances housing and open space. It meets or exceeds all of the development objectives of the Town as outlined in the RFP.

Site and Landscape Plan Description

Situated to respond to surrounding context, the site plan was informed by planning studies conducted by DSA and the Town in 2018 and input from neighbors. The plan includes multiple buildings, one 31-unit Community Apartment building and three small scale buildings, each with three townhomes. It includes a mix of unit sizes and a variety of common spaces.

Outdoor Amenities

The larger Community Apartment building provides outdoor amenities such as gathering spaces and bicycle racks. The shared patio and usable open space just off of the community room at the Community Apartment building will provide significant outdoor amenity space for residents. With southern exposure and thoughtful landscaping, this will be the ideal space for gatherings and leisure. The patio will accommodate outdoor furniture, meandering paths create a more intimate spaces, and open lawn will welcome play. Townhouses include both two-bedroom and three-bedroom family apartments along Packard St. The front setback is similar to front yard setbacks at existing single-family houses along Packard Street and will provide space for individual gardens.

Landscape and Buffering

The plan is sensitive and responsive to neighbors. Conditions differ on each side of the site and as such, a variety of buffering strategies have been proposed. All plantings will be non-invasive, drought tolerant, native plantings.

At the front, the townhouse buildings are set back from the sidewalk 25' - 30', similar to other single-family homes along Packard St. They are clustered and offset in a way that breaks up the overall massing, adds visual interest, and is similar in scale to surrounding homes. Taking cues from our neighbors, we propose sloping roofs and the three-bedroom townhouse units will have dormers to accommodate the third bedroom.

In response to nearby homes on Shawmut Ave, we have provided a landscape buffer strip on the west property line that is wide enough to accommodate large growth trees. The entrance driveway shrinks and jogs in response to the homes situated very close to the property line.

The rear of the site faces a neighborhood on Plant Street, here the building is set back 20'. Within the setback, we intend to plant native trees and shrubs, providing a more natural buffer that is contextual with existing landscape.

On the east side, open space and plantings have been located to maximize privacy of abutting properties while taking advantage of proximity to the community room and patio. Closer to Packard Street, a privacy fence will be installed along the exit driveway to provide visual separation from the neighbor's house at 64 Packard Street.



Traffic and Parking

The project provides sufficient parking, a 1:1 ratio appropriate for the housing type and mix. The parking layout makes efficient use of the site in order to maximize open space and landscaped areas. Located between the townhouses and the Community Apartment building, the parking is hidden from view of the street, while still convenient for all residents. The drive aisle will be one-way to limit paving, provide safe internal traffic flow, and make turning into and out of the development safe. The proposed driveway will accommodate emergency vehicles by providing access to all areas of the site. We welcome the town's input and requirements for providing safe and adequate emergency access and can modify if necessary.

Site Lighting

Site lighting will be provided by a mix of building mounted lighting, pole lighting, and attractive illuminated bollards. All lighting elements will be dark sky approved to minimize light pollution and impacts to adjacent properties and residents of the development. Lighting will be used to provide enhanced visibility for security reasons along driveways, walkways, at entries, the parking lot, and the patio. As the exterior lighting design is further developed with our engineers, we will take into account views and location of windows in our own and neighboring buildings.

Description of Structures and Unit Mix

The design is respectful of neighborhood context and has a variety of massing and materials in the architectural style of the surrounding neighborhood. The buildings include common spaces and amenities to support a vibrant community. The proposed development has been designed to accommodate a variety of households and a mix of affordability levels. The property meets the DHCD requirements for family housing of having 10% 3BR units and 65% 2BR+ units.

	1BR	2BR	3BR	TOTAL
Comm Apt	13	17	1	31
Townhouse	0	5	4	9
Total	13	22	5	40
HC Units	3	1	1	5

The Community Apartment building offers shared amenity spaces and enhanced accessibility. All units are visitable and five will be fully accessible HC units (3 of which will be enhanced CBH units) which exceeds code requirements. All units in the building will be served by an elevator and will incorporate universal design strategies that support aging in place.

By contrast, the townhouse units are private and contained with direct entries and individual outdoor space. With in-unit laundry, multiple bedrooms, and generous shared spaces, the townhouse units will be perfect for families.





Buildings are limited to 2.5 stories; the top story space is within the roofline to reflect existing neighborhood architecture.

The plan includes:

Multiple buildings

The plan includes multiple buildings: one 31-unit Community Apartment building and three small scale buildings, each with three townhomes.

Landscaping

Outdoor Amenities: A common patio and usable greenspace will be available for residents' use. In addition, pedestrian friendly walkways with bench seating are scattered around the site.

Storage

The plan includes a storage room at the Community Apartment building with dedicated storage lockers for residents.

On-site Laundry

Trash and Recycling: The Community Apartment building is equipped with trash and recycling chutes for ease of disposal. To minimize impact to site and neighbors, the trash and recycling pick up is conveniently located off of the entrance drive and heavily screened from neighbors.

Community Room

The large Community Room in the Community Apartment building can accommodate gatherings and meetings. It is south-facing and opens directly onto the shared patio overlooking the open space.

Bike Storage

As biking is an increasingly popular mode of transportation and leisure, the proposal accommodates outdoor and indoor bike parking. Exterior racks are located at the entrance of the Community Apartment building. Inside, a dedicated bike room can accommodate 40 bicycles promoting healthy living.

Management Office:

The on-site property management office is located off of the entrance lobby.

Entrance Lobby

A welcoming lobby is located close to the entrance driveway and parking lot. The lobby includes a mail area and dedicated package room.

Soundproofing

Soundproofing between units is of upmost importance in family housing. As we consider finish materials and floor assemblies, the design will meet or exceed stringent code requirements for providing soundproofing between units and between floors.

Facade Materials

Our material pallet includes durable, attractive, and low maintenance fiber cement shingles and lap siding matching the aesthetic of nearby homes, as well as energy efficient fiberglass windows. We've proposed high quality exterior design and materials to blend with and complement the neighborhood. Though different styles, the Community Apartment building and the townhouse building have a similar material and color pallet contributing to the cohesive design.

CONSTRUCTION STAGING PLAN

Prior to construction of the 62 Packard St affordable Housing, L.D. Russo will present a full construction staging and management plan for review by the Town of Hudson, including submission to the Planning officer, building department, DPW and Fire departments. The purpose of the plan is to establish expectations and standards to manage the construction process with an appropriate and reasonable mitigation of disruption to the abutters and community.

New construction by its nature will create a certain amount of noise, disruption, and inconvenience. However, with proper planning, the construction process can move smoothly and in coordination to best satisfy the needs of the local community while moving to a timely completion.

A construction staging plan will include, but is not limited, to the following:

- All local provisions regarding noise control and approved construction work hours shall be adhered to.
- All reasonable action shall be taken to minimize the negative effects of construction on abutters. Advance notice shall be provided to all abutters in writing at least 72 hours prior to commencement of construction of the project.
- Drilling and blasting (if required) shall be limited to Monday-Friday between 8:00 AM until 5:00 PM. There shall be no drilling or blasting on Saturdays, Sundays, or holidays. Blasting shall be undertaken in accordance with all local and state regulations.
- Construction vehicles shall be cleaned prior to leaving the site, as necessary, to avoid leaving dirt and/or debris on surrounding roadways as they leave the site.
- All construction shall be performed in accordance with the approved plans, construction management plan, and all applicable State regulations.
- All construction vehicles left overnight at the site must be located completely on the site.
- To the extent feasible, construction crew parking will be onsite or limited to the immediate area of the worksite.
- Trash will be cleaned daily into onsite dumpsters. Construction waste shall be managed with 15 yard and 30 yard containers removed by an established construction waste vendor.
- Street closures will be minimized when possible. Any lane or street closures will be coordinated with the local DPW and police details will be hired if and as necessary.
- The construction site shall be fenced for safety and access points will be established to manage truck and personnel entry and exit.
- Dust control: The contractor shall construct a temporary stone construction entrance per plan. As required, the contractor will sweep or otherwise clean the roadway to prevent tracking of dirt on the public way. As needed, particularly in the summer, the contractor shall water the site or incorporate other appropriate dust management efforts to minimize/prevent creation of dust at the site.



ENERGY EFFICIENCY AND SUSTAINABILITY

The following describes the project's overall approach to sustainable design, construction, and operation. The sustainable approaches outlined below ensure that the project will meet LEED for Homes v4 certification at the Silver threshold level, and also pursue the potential for Passive House certification.

3.1 Regulatory Context

3.1.1 Massachusetts Stretch Energy Code

The project is located in Hudson, MA which adopted the Massachusetts Stretch Energy Code (Stretch Code) in 2019. Therefore, the project will show compliance with the applicable energy savings requirements via Home Energy Rating System (HERS) modeling and a maximum HERS score of 55.

3.2 Sustainability/Green Building Design Approach

The Project will incorporate sustainable principles into its design, construction, and continued operation activities.

3.2.1 General Sustainability Approach

The following sustainability goals for the Project design includes the following sustainable principles:

- An integrated team, members of which will collaborate throughout the design and construction process

- Enhancing the neighborhood by improving a previously underutilized site
- Environmentally friendly site design and consideration of landscaping and heat island effect to benefit both residents and the surrounding neighborhood.
- A neighborhood with a high degree of walkability and proximity to public transportation, as well as a covered bicycle storage space for each unit.
- Efficient water use that minimizes waste and maximizes available technology for both outdoor and outdoor water systems.
- Energy efficiency through a high-performance envelope, installation of high-efficiency equipment, and a right-sized system design.
- Healthy materials and finishes throughout all interior spaces, reducing health risks for residents.
- Effective ventilation and exhaust systems, designed to ensure continued health and air quality throughout the life of each building.

3.2.2 Passive House Institute US – PHIUS

The Project will conduct a feasibility study for participation in the Passive House Institute US (PHIUS) Passive House certification and the MassSave Rebate Incentive program. Passive House certification will be reviewed for feasibility and





cost-effectiveness.

3.2.3 LEED for Homes v4

The Project will meet the requirements for Silver level certification through the United States Green Building Council's (USGBC) Leadership in Energy and Environmental Design (LEED) Building Design and Construction Homes Multifamily rating system (LEED H V4). Details regarding LEED compliance are discussed below.

3.2.3.1 Integrative Process

The Project will have an integrative Project Team that will include skill sets in architecture, civil engineering, green building, and mechanical/electrical/plumbing (MEP). The integrative Project Team will meet consistently and will be involved from schematic design throughout to construction.

3.2.3.2 Location and Transportation

The Project is being constructed on land that is greater than 75% previously developed and greater than 75% of the land surrounding the project is also previously developed; the Project is not being developed on land that lies within a flood plain hazard area as identified by the Federal Emergency Management Agency (FEMA). The Project is within ½ mile walking distance of numerous community resources, open space, and public transportation options.

3.2.3.3 Sustainable Sites

The Project intends to develop plans to conform to the requirements of the EPA Construction General Permit and is designed to use no invasive plant species. Additionally, during construction, all cracks, penetrations and entry points will be appropriately sealed.

3.2.3.4 Water Efficiency

The Project is designed to incorporate high-efficiency water fixtures to reduce indoor water consumption. The Project is expected to exceed a 20% annual potable water use reduction for interior water use and sewage conveyance using low-flow/high-efficiency plumbing fixtures. Additionally, the Project will use efficient irrigation to reduce outdoor water use.

3.2.3.5 Energy & Atmosphere

Per Stretch Code requirements, the project will demonstrate a maximum HERS score of 55. In addition to the point for Annual Energy Savings, bonus LEED points will be achieved for small unit sizing via the LEED H Home Size Adjustment calculation. The Project will adhere to the requirements of the following Energy Star (ES) checklists: ES v3 Thermal Enclosure Checklist and ES v3 Water Management System Builder Checklist. The Project will strive for reductions in overall energy consumption through measures such as including an electricity meter for each apartment and a gas meter for the entire building. The Project will provide the owner with an operations and maintenance manual with all LEED/sustainability related requirements.

3.2.3.6 Materials and Resources

The Project will commit to using non-tropical woods, or when tropical woods are required, to use only FSC certified or reclaimed wood. Additionally, the Project will commit to using local and recycled products wherever possible. Local aggregate will be sourced for the foundation concrete and concrete will contain fly ash or slag. Prior to construction, a construction waste management plan will be developed to ensure that at least 75% of construction waste is diverted toward recycling for at least 4 different material types. During construction, the Project will retain the services of a 3rd party verification team to confirm that designed durability measures have been installed correctly.

The Project will commit to complying with this prerequisite to promote durability and performance of the building enclosure and its components and systems through compliance with the ES v3 Water Management System Builder Checklist, and through measures as outlined by the USGBC, including the following:

- Use of non-paper faced backer board in bath and shower areas
- Use of water-resistant flooring in kitchen and baths
- No carpet within 3-feet of exterior entry doors
- Direct exhaust of all conventional clothes dryers
- Installation of drain/drain pans, or stainless-steel braided mesh water supply lines, for all clothes washers and water heaters installed over living spaces

3.2.3.7 Indoor Environmental Quality

The Project will utilize low-emitting materials to provide a healthy indoor environment for all occupants and visitors. The Project will be designed so that all in unit spaces comply with the requirements of ASHRAE 62.2-2010 and all common area spaces comply with the requirements of ASHRAE 62.1-2010. Each unit will have a carbon monoxide detector and all gas combustion on-site will be sealed. At a minimum, MERV 8 filters will be installed at all air handling units and ventilation system(s). Low emitting products will be specified and installed for paints and coatings, flooring, adhesives and sealants, and insulation.

The Project will utilize continuous ventilation to exhaust air from bathrooms and kitchens and the system will be balanced by providing fresh air to each unit. Testing at the end of construction will ensure that ventilation rates meet the design.

The Project will be designed and constructed to minimize leakage between units. Maximum allowable leakage rate is 0.30 cfm50 per square foot of enclosure since the average unit size for the building is below 1,200 square feet (per LEED Interpretation #10465). Compartmentalization testing will be completed to verify performance at the end of construction.

Smoking will be prohibited throughout the Project, including within the living units. No smoking will be permitted within 25 feet of all entries, outdoor air intakes, and operable windows. Signage will be installed, and language will be included in rental agreements to communicate this to the potential residents.

The Project is in EPA Radon Zone 1, so it is not required to adhere to the Radon-Resistant Construction prerequisite.

3.2.3.8 Innovation Design

At a minimum, the Project will develop a preliminary checklist (LEED prerequisite) and include a LEED Accredited

Professional on the team (optional point). The Project will pursue additional Innovation Credits that are feasible and cost effective.



PROJECT FINANCING PLAN AND POTENTIAL FINANCIAL RESOURCES

The development of affordable housing in Massachusetts relies on a variety of federal, state, and local resources. Our project will create 40 affordable housing units for a variety of household sizes by creating one-, two-, and three-bedroom units in multiple housing types. We propose three townhouse style structures offering nine two- and three-bedroom units along Packard Street and, at the rear of the site, one multifamily building that offers housing visitable by households that rely on accessible housing features. Five units will be fully accessible for those with mobility disabilities and one unit will be accessible to those with sensory disabilities. This 2.5-story building with flats includes an elevator so that residents and visitors of a variety of mobility and sensory disabilities can access their homes or their family members' homes. Further, our proposed housing offers a variety of energy saving and sustainability features. While these features help to reduce costs for the residents, they do require up-front development costs, which are incorporated into our development proforma.

The development pro forma is provided in Section 2. Based upon our experience developing affordable rental housing, we have carefully crafted a development budget that maximizes federal and state funding programs that support the type of housing outlined in the RFP. Proposed equity sources are Federal and State Low Income Housing Tax Credits (LIHTC), which are allocated to owners of projects creating affordable rental housing for households earning up to 60% AMI. Based upon per unit caps set by DHCD, the maximum 9% Federal LIHTC credit available to the project is \$900,000. The maximum annual State LIHTC for which we can apply is \$480,000, which is the lesser of \$12,000 per unit and \$700,000 per project of this size. We have solicited interest from equity investors and include a Letter of Interest in Section 2 from Stratford Capital Group for the purchase of the Federal and State LIHTC.

Projected "soft debt sources" (meaning loans that are deferred and require no repayment as long as the affordable restrictions are in place) include the following State program resources: Affordable Housing Trust Fund (AHTF), HOME, Housing Stabilization Fund (HSF), Housing Innovation Fund (HIF), and Community Based Housing (CBH). Each of the funding programs include unique project requirements.

HIF Funds are allocated to developments in which at least 25% of the apartments are affordable to households with incomes below 30% AMI. We are able to meet this requirement by including operating subsidies for 10 units.

The sponsor will include the request for these operating subsidies in its application to DHCD. There will also be three subsidized units for households with incomes at or below 30% AMI that are "CBH" units, per the paragraph below.

CBH funds help to support the creation of housing for persons with disabilities who are institutionalized or at risk of institutionalization. We will seek project certification from the Massachusetts Rehabilitation Commission for three 1-BR Units, and operating subsidies for these units from DHCD, in addition to the 10 subsidies required to meet the HIF requirement.

The gross rents on the remaining 27 units in the operating budget are set at rents that mirror 50% AMI rents for the Boston MSA, since market rents in Hudson are closer to Worcester and Fitchburg rents than Boston rents. The income levels of the residents of the units will be up to 60% AMI for the Boston MSA to allow for a marketing window. Heat and hot water are expected to be included in rent and the utility allowances deducted from the gross rents in the pro forma reflect that assumption.



As the Commonwealth of MA requires a local match for all projects seeking state subsidy, we have included an allocation of \$325,430 of Town of Hudson Community Preservation Act Funds as a source for the project. We understand that the Town has invested significant funds to prepare the site for disposition, for such things as the environmental assessments, demolition and carrying costs, therefore we have minimized our reliance on local sources and will communicate with the Commonwealth the overall value leveraged by the Town in our application to DHCD.

An important part of our project financing is a permanent loan that can be borrowed because of the net operating income generated by the rents received. Given the above assumptions on rents and rent subsidies we are projecting a \$2,750,000 amortizing loan on the property. A Letter of Interest from the Massachusetts Housing Partnership is included in Section 2.

An Affordable Housing Restriction will be adopted for the proposed project and incorporate the requirements of each of the funding programs that are awarded. A chart summarizing the proposed financing sources and commitment status is shown below:

Metro West CD and its consultants are fully versed in the funding application process for affordable housing. Metrowest CD's recent project in Medway, Glen Brook Way Apartments, is similar to this proposed project. Not only was Glen Brook Way Apartments a friendly 40B, but it also utilizes many of the same affordable housing subsidies. The timeline in Section 5 of this proposal shows the schedule for securing these sources.



PERMANENT FINANCING SOURCES	AMOUNT	STATUS
LIHTC Equity (Federal 9%)	\$ 8,369,163	Request credits from DHCD in January 2022 application; Equity LOI from Stratford (assumes 93 cent tax credit raise)
State LIHTC Equity	\$ 1,968,000	Request credits from DHCD in January 2022 application; Equity LOI from Stratford (assumes 82 cent tax credit raise)
State: HOME	\$ 847,028	Plan to request in DHCD Funding Round Jan '22
State: HSF	\$ 1,000,000	Plan to request in DHCD Funding Round Jan '22
State: HIF	\$ 500,000	Plan to request in DHCD Funding Round Jan '22
State: CBH	\$ 652,972	Plan to request in DHCD Funding Round Jan '22
State: AHTF	\$ 1,000,000	Plan to request in DHCD Funding Round Jan '22
Town of Hudson CPA	\$ 325,430	Plan to request August 2021
Permanent Loan	\$ 2,750,000	LOI from Massachusetts Housing Partnership
Total Development Cost	\$17,412,593	
Construction Loan	\$ 9,000,000	LOI from Eastern Bank

Hudson Police Station Site

Income Analysis

Updated

3/30/2021

RESIDENTIAL INCOME							
Unit Size	Target Population	Project-Based Operating Subsidy	# of Units	Contract Rent	Utility Allowance	Gross Rent	Annual Income
1 Bedroom							
	30% AMI	Section 8	3	\$1,720	\$30	\$1,750	\$61,920
	30% AMI	Mass. Rental Voucher Program	0	\$1,440	\$0	\$1,440	\$0
	60% AMI	None	<u>10</u>	\$1,208	\$42	\$1,250	<u>\$144,960</u>
<i>Subtotal 1 Bedroom Units</i>			13				\$206,880
2 Bedroom							
	30% AMI	Section 8	4	\$2,369	\$31	\$2,400	\$113,712
	30% AMI	Mass. Rental Voucher Program	4	\$1,728	\$0	\$1,728	\$82,944
	60% AMI	None	<u>14</u>	\$1,351	\$49	\$1,400	<u>\$226,968</u>
<i>Subtotal 2 Bedroom Units</i>			22				\$423,624
3 Bedroom							
	30% AMI	Section 8	1	\$2,768	\$32	\$2,800	\$33,216
	30% AMI	Mass. Rental Voucher Program	1	\$1,995	\$0	\$1,995	\$23,940
	60% AMI	None	<u>3</u>	\$1,645	\$55	\$1,700	<u>\$59,220</u>
<i>Subtotal 3 Bedroom Units</i>			5				\$116,376
			40			Residential Income	\$746,880

Hudson Police Station Site

Development Budget

ITEM	TOTAL PROJECT COST	
ACQUISITION		
Acquisition: Land		-
Land Cost	-	
Total Acquisition Cost		-
CONSTRUCTION / REHABILITATION		
<i>Direct Construction Budget</i>		11,719,820
Residential	11,619,820	
Landscaping	100,000	
<i>Construction Contingency</i>		585,991
Total Const. / Rehab. Costs		12,305,811
ARCHITECTURE AND ENGINEERING		
<i>Architecture</i>		908,600
<i>Engineering</i>		151,000
Civil	131,000	
Geotechnical	20,000	
Total Architecture & Engineering		1,059,600
SURVEY & PERMITS		
<i>Survey- supplied by Town</i>		-
<i>Permit Fees</i>		167,058
<i>Utility Hook Up Fees (Specify)</i>		60,000
Total Survey & Engineering		227,058
GENERAL DEVELOPMENT COSTS		
<i>Owners Rep/Clerk of the Works</i>		105,400
<i>Environmental</i>		10,000
<i>Furniture, Fixtures & Equipment (FF&E)</i>		25,000
<i>Bond Premium</i>		123,058
<i>Legal</i>		167,000
<i>Title and Recording</i>		42,938
<i>Accounting & Cost Certification</i>		28,400
<i>Marketing</i>		25,000
<i>Real Estate Taxes</i>		40,000
<i>Insurance</i>		90,000
<i>Appraisal and Market Study Costs</i>		27,950
<i>Security (if not in const contract)</i>		
Total General Development Costs		684,746
FINANCING COSTS		
<i>Const. Loan Interest</i>		509,729
Interest charges (conventional)	509,729	
<i>Acquisition and Predevelopment Loan Interest & Fees</i>		91,800
<i>Inspecting Engineer/Lender's Inspector</i>		33,000
<i>Loan Fees (Construction and Perm)</i>		61,750
Construction Loan Origination Fee	31,500	
Perm Loan Origination Fee	27,500	
Other Fees (specify): Perm Loan Application Fee	2,750	
<i>DHCD Fees (LIHTC FEES)</i>		52,850
LIHTC Processing Fee	47,700	
One Stop Application Fees	5,150	
<i>Syndication Fees</i>		40,000
Total Financing Costs		789,129
OTHER		
<i>Construction Testing</i>		30,000
<i>Development Consultant</i>		65,000

Hudson Police Station Site***Development Budget***

ITEM	TOTAL PROJECT COST
Other Consultant (specify): Energy Modeling/Green Consultant	20,797
Soft Cost Contingency	143,822
Total Other Costs	259,619
Total Soft Costs	3,020,152
<i>Subtotal:Acq, Constr and Soft</i>	15,325,963
RESERVES	
Replacement Reserves	
Operating Reserves	327,090
Lease-up Reserve	60,000
Total Reserve Costs	387,090
DEVELOPER COSTS	
Developer Overhead	849,770
Developer Fee	849,770
Total Developer Costs	1,699,541
TOTAL DEVELOPMENT COST	17,412,593

Hudson Police Station Site

Income Analysis

Updated

3/30/2021

RESIDENTIAL INCOME

Unit Size	Target Population	# of Units	Contract Rent	Utility Allowance	Gross Rent	Annual Income
1 Bedroom						
	30% AMI - S8	3	\$1,720	\$30	\$1,750	\$61,920
	30% AMI - MRVP	0	\$1,440	\$0	\$1,440	\$0
	60% AMI	<u>10</u>	\$1,208	\$42	\$1,250	<u>\$144,960</u>
<i>Subtotal 1 Bedroom Units</i>			<i>13</i>			<i>\$206,880</i>
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<i>Subtotal 2 Bedroom Units</i>			<i>22</i>			<i>\$423,624</i>
3 Bedroom						
	30% AMI - S8	1	\$2,768	\$32	\$2,800	\$33,216
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<i>Subtotal 3 Bedroom Units</i>			<i>5</i>			<i>\$116,376</i>
			<i>40</i>		<i>Residential Income</i>	<i>\$746,880</i>

PROJECTED 10-YEAR OPERATING BUDGET

Hudson Police Station Site 10-Year Cash Flow

	1	2	3	4	5	6	7	8	9	10
REVENUE										
Rental Income	315,732	322,047	328,488	335,057	341,758	348,594	355,566	362,677	369,930	377,329
Gross Rental Income - Vouchers	431,148	439,771	448,566	457,538	466,688	476,022	485,543	495,254	505,159	515,282
Gross Rental Income - Others	(15,787)	(16,102)	(16,424)	(16,753)	(17,088)	(17,430)	(17,778)	(18,134)	(18,497)	(18,866)
Res Vacancy - MRP/P/S8	(30,180)	(30,784)	(31,400)	(32,028)	(32,668)	(33,322)	(33,988)	(34,668)	(35,361)	(36,068)
Res Vacancy - Others	7%									
TOTAL EFFECTIVE INCOME	700,913	714,931	729,230	743,815	758,691	773,865	789,342	805,129	821,231	837,656
EXPENSES										
Operating Expenses										
Management Fee	35,046	35,747	36,461	37,191	37,935	38,693	39,467	40,256	41,062	41,883
Administrative Expenses	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Operating & Maintenance Expense	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Utility Expense	69,636	71,725	73,877	76,094	78,376	80,728	83,149	85,644	88,213	90,860
Resident Services	24,000	24,720	25,462	26,225	27,012	27,823	28,657	29,517	30,402	31,315
Asset Management Fee	7,500	7,725	7,957	8,195	8,441	8,695	8,955	9,224	9,501	9,786
Property/RE Taxes	65,000	66,625	68,291	69,998	71,748	73,542	75,380	77,265	79,196	81,176
Insurance and Other Taxes	65,486	67,450	69,474	71,558	73,705	75,916	78,193	80,539	82,955	85,444
Replacement Reserves	14,000	14,420	14,853	15,298	15,757	16,230	16,717	17,218	17,735	18,267
TOTAL EXPENSES	466,809	480,138	493,852	507,961	522,478	537,414	552,782	568,594	584,863	601,602
NET OPERATING INCOME	234,104	234,733	235,378	235,853	236,213	236,450	236,560	236,535	236,369	236,054
DEBT SERVICE										
DSCR										
NET CASH FLOW	(187,370)	1.25	47,423	48,008	48,483	48,842	49,080	49,190	49,165	48,683

March 31, 2021

Ms. Jennifer Van Campen
Executive Director
Metro West Collaborative Development, Inc.
74-B Chapel Street
Newton, MA 02458

**Re: Hudson Police Station Site
Hudson, MA**

Dear Jennifer,

Stratford Capital appreciates the opportunity to arrange for the equity capitalization of a to-be-formed limited partnership or limited liability corporation (the “Property Owner”) which will develop 40 units of affordable housing at 62 Packard Street, Hudson, MA, the site of the Hudson Police Station (the “Property”). We understand that the development of the Property will be financed by a First Mortgage Loan in the presently anticipated amount of \$2,750,000, as well as other state and local funding sources totaling approximately \$4,325,430. The Property will be developed, owned and operated so that 100% of the apartment units qualify for federal and state low-income housing tax credits (the “Federal Tax Credits, and State Tax Credits, respectively”).

Based on the materials that you have delivered to us to date, and assuming the accuracy and completeness thereof, Stratford Capital will arrange to provide equity capital (“Equity Capital”) to the Property Owner in the amount of approximately \$8,369,163, equal to 93% (\$0.93 per dollar of Federal Tax Credits) of the anticipated \$9,000,000 of Federal Tax Credits which will be available for a 99.99% ownership interest in the Property Owner. In addition, Stratford Capital will arrange for the purchase of State Tax Credits in the amount of \$2,400,000 for an anticipated price of \$1,968,000, equal to \$0.82 per \$1.00 of State Tax Credits (the “State Tax Credit Purchase Price”).

We anticipate that the equity closing will occur upon Investor Closing and all other conditions to closing are satisfied (the “Initial Closing”), and that the Equity Capital will be contributed (1) 20% upon Initial Closing, (2) 10% upon 50% Completion, (3) 20% upon the Completion Date, (4) 40% upon Final Closing, and (5) 10% upon the Stabilization Date and receipt of IRS Forms 8609. The State Tax Credit Purchase Price will be paid in full between the Completion Date and Final Closing.

As you may know, the principals of Stratford Capital have arranged for the equity financing of over 300 multi-family residential properties which benefit from Federal Tax Credits, including many which also benefit from State Tax Credits. We look forward to working with you on the redevelopment of the Hudson Police Station site.

Ms. Jennifer Van Campen
March 31, 2021
Page 2

Please call me at (978) 535-5600, extension 113 if you have any questions. We look forward to working with you and closing the transaction.

Sincerely,

STRATFORD CAPITAL GROUP

By: 
Bruce R. Sorota
Senior Vice President



March 31, 2021

160 Federal Street
Boston, Massachusetts 02110
Tel: 617-330-9955
Fax: 617-330-1919

www.mhp.net

Jennifer Van Campen
Executive Director
Metro West Development Collaborative
79-B Chapel Street
Newton, MA 02458

RE: Former Hudson Police Station Site, Hudson, MA

Dear Ms. Van Campen:

This letter is to indicate the interest and support of Massachusetts Housing Partnership to provide permanent financing to Metro West Collaborative Development (Metro West CD) for the redevelopment of the former Hudson Police Station site on Packard Street, Hudson. I understand that Metro West will be responding to an RFP for the site.

Metro West CD has an experienced team that understands suburban development. They completed 18 units of newly constructed housing in Norwell last year on the former site of the Norwell Police Station. Currently they are under construction on Phase 1 of Glen Brook Way Apartments (48 units of family housing, new construction) where MHP has committed to provide permanent financing. Metro West CD is also in the current funding round for an award from DHCD on Phase Two of their Medway project, which will be 44 units of age-restricted housing. Based on their experience, Metro West CD is well positioned to redevelop the Hudson police station site into family housing with sustainability, affordability and accessibility in mind.

I understand that the proposed development will consist of the new construction of a 31 unit building and 9 townhomes on the former site of the Hudson Police Station. The project will be 100% affordable to households with incomes at or below 60% of AMI, with 13 units being affordable to households with incomes at or below 30% of AMI.

After a preliminary review of your operating projections, presented to MHP in your most recent pro forma dated, we have determined that a loan of up to \$2,750,000 at an estimated interest rate of 5.50% would be feasible. This rate quote anticipates a term of 20 years amortizing over 30 years and includes a 24 month forward rate lock.

Please understand that this outline of terms and partial conditions is not a commitment to lend, either expressed or implied.

I look forward to learning more about this development as you seek the commitments you need to move forward. Please keep me informed of your progress and best of luck with your RFP submission.

Sincerely,

Alma Balonon-Rosen

Alma Balonon-Rosen
Senior Relationship Manager

cc: Amanda Roe, MHP



March 23, 2021

Jennifer Van Campen
Executive Director
Metro West Collaborative Development, Inc
79-B Chapel St
Newton, MA 02458

Dear Jennifer,

Thank you for presenting us with the opportunity to provide this letter of interest for the proposed construction for the Hudson Police Station site's redevelopment for 40-units of affordable housing in Hudson, MA (the "Project") being undertaken by Metro West Collaborative Development, Inc.

I have attached a proposed Term Sheet that provides an overview of the terms and conditions we would provide for the construction.

Please be advised that this letter is not a commitment to lend. Any approval of the proposed financing would be subject to underwriting, further due diligence, and approval by the Bank's Credit Committee.

If you have any questions, please do not hesitate to contact me at (617) 897-1085. I look forward to working with you.

Kind Regards,


Johanna Stone
Vice President
Community Development Lending

CC: Wendy Cohen, New Seasons Development LLC.

**Eastern Bank
LOI**

Bridge Loan	
Borrower:	Borrower to-be-determined (single asset entity holding a fee simple interest in the Project)
Sponsor:	Metro West Collaborative Development, Inc
Type of Loan:	Construction
Loan Amount:	Up to \$9,000,000
Loan Purpose:	To provide construction for a proposed 40-unit income restricted housing project for the redevelopment of the Hudson Policy Station.
Loan Term:	24 months from closing.
Repayment Schedule:	Monthly interest only payments in arrears. Principal due upon maturity of grant funds, and funding of the permanent loan.
Interest Rate:	Fixed at the 2-year Federal Home Bank of Boston Classic Advance Rate plus 225 basis points (currently 2.76%).
Commitment Fee:	0.30%
Advance Rates:	The Bank will advance up to 90% of the net monetized value of public subsidies committed and allocated to the Project and up to 80% LTV based on “as complete-as stabilized” value
Collateral:	First Mortgage Lien and Collateral Assignments of Leases, Rents, and Project entitlements on the Project.
Guarantor:	Metro West Collaborative Development, Inc will provide a full completion guarantee during construction.
Appraisal:	An independent appraisal and appraisal review will be required prior to closing.
Environmental:	Borrower to provide all relevant environmental documentation, including Phase I Environmental Site Assessments on all collateral properties. Borrower must undertake prior to closing (or reserve funds for) any additional environmental cleanup requirements noted by the Phase I reports.
Financial Reporting:	-Annual audited financial statements for Borrower and Guarantor

Construction Review:	Prior to closing, the Bank will engage, at Borrower's expense, an independent construction consultant to review all construction documents and contracts, and to complete a preconstruction review to certify the validity of the contract value, contractor's ability, and development cost budget.
Construction Draws:	All construction draws will be subject to receipt of a requisition certificate and tracking spreadsheet in form and substance satisfactory to the Bank, confirmation of lien waivers, title policy endorsement, and requisition review by the Bank's construction consultant.
Expenses:	Borrower and Sponsor agree to reimburse the Lender for third-party expenses incurred in this matter whether or not the loan closes.
Insurance:	Closing of the Loan is contingent on the Bank's satisfactory review of insurance obtained for the Project, and the Bank being named as an additional insured party. At Borrower's option, the Bank will provide a free, non-binding quote for builder's risk and commercial property and liability insurance through our wholly owned subsidiary, Eastern Insurance Group.
Equity Requirements:	Terms of all tax credit investor/syndicator terms and conditions and pay-in schedules will be subject to satisfactory review by the Bank.
Reserve Requirements:	The Project must contain adequate reserves for construction interest, debt service during lease-up and prior to stabilization, capital replacements, and deficit operations.
Deposit Accounts:	All construction, operating, reserve, and security deposit accounts will be held at Eastern Bank.
Other Conditions / Pre-Closing Requirements:	<ul style="list-style-type: none"> -Closing is contingent on receipt of all necessary City/State permits and approvals. -Closing is contingent on confirmation of the availability of all public subsidy and subordinated debt needed to balance the development budget; -General Contractor will obtain a payment and performance bond with respect to its obligations to complete the Project.

3

Conceptual Design Drawings

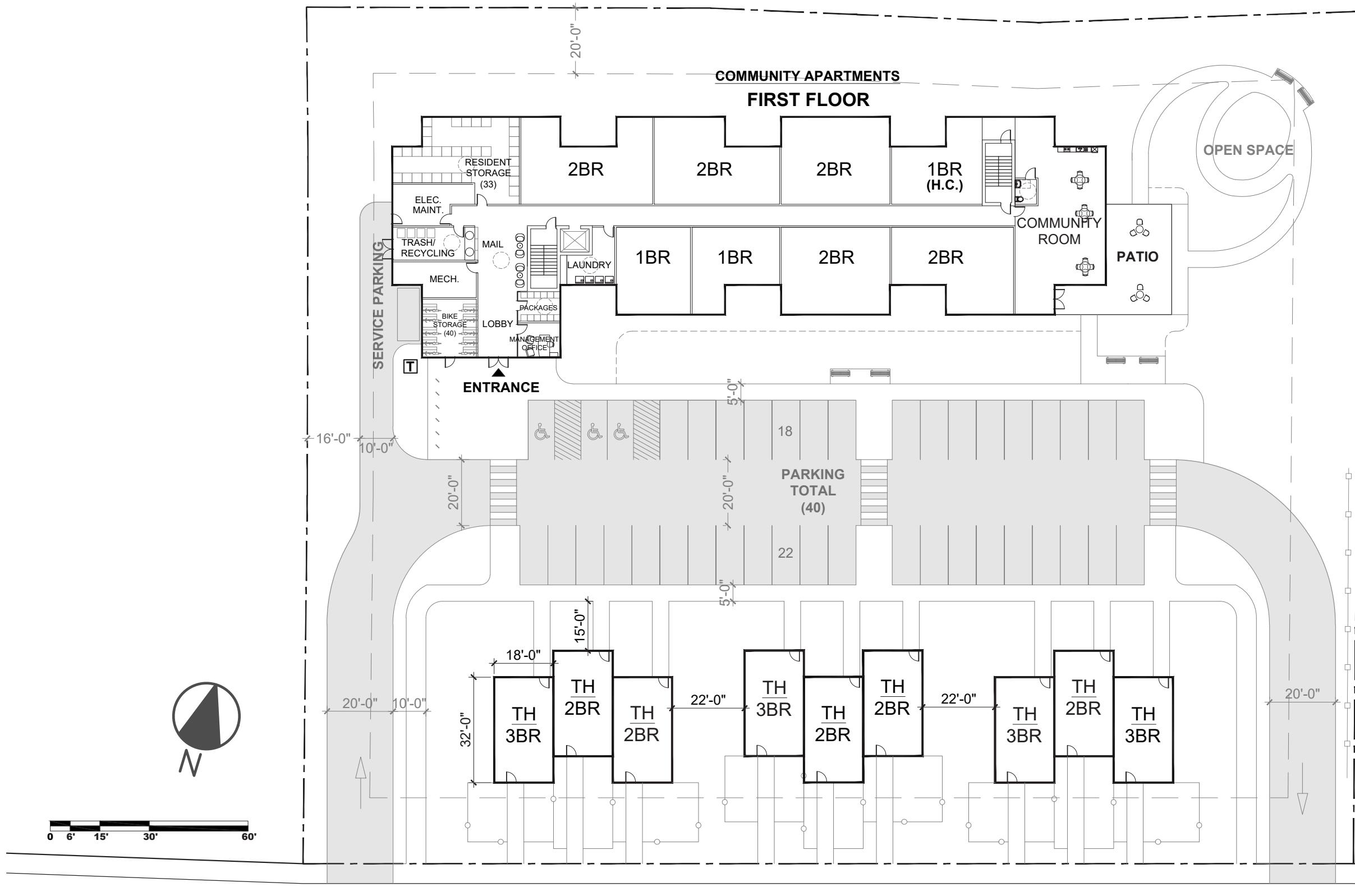




SITE AND LANDSCAPE PLAN

PACKARD STREET HOUSING | The Hudson Municipal Affordable Housing Trust | Metro West Collaborative Development

FLOOR PLANS



FIRST FLOOR PROGRAMS

- MANAGEMENT OFFICE
- MAIL & PACKAGE
- LAUNDRY ROOM
- TRASH / RECYCLING
- MAINTENANCE/ ELEC.
- MECHANICAL ROOM
- BIKE STORAGE (40)
- RESIDENT STORAGE (33)
- COMMUNITY ROOM & PATIO
- COMMON BATHROOM
- ELEVATOR

PROPERTY LINE

UNIT MIX (H.C. UNIT)				
	1BR	2BR	3BR	TOTAL
1 FLOOR	3 (1)	5	-	8 (1)
2 FLOOR	5 (1)	7 (1)	1 (1)	13 (3)
3 FLOOR	5 (1)	5	-	10 (1)
TOWNHOUSE	-	5	4	9
TOTAL	13 (3)	22 (1)	5 (1)	40(5)

TOWNHOUSES (GSF) : TOTAL 12,054 SF

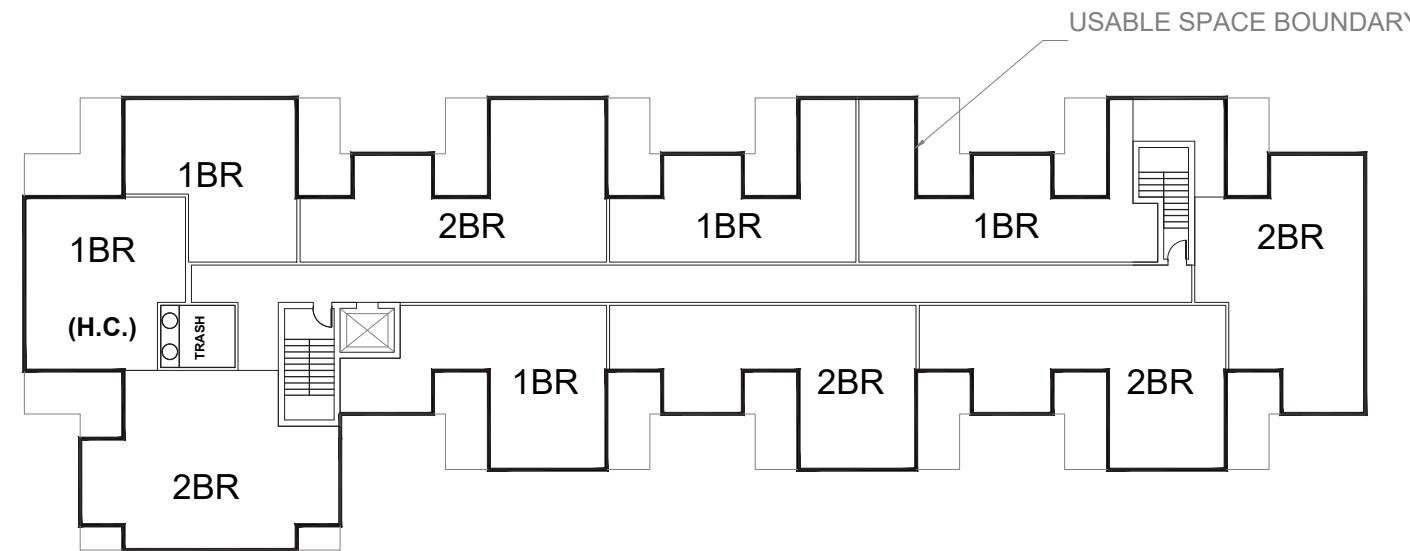
COMMUNITY APARTMENTS (GSF)

- BUILDING FOOTPRINT: 12,177 SF
- TOTAL GSF: 34,328 SF
- RESIDENTIAL AREA: 23,761 SF
- COMMON AREA: 10,567 SF



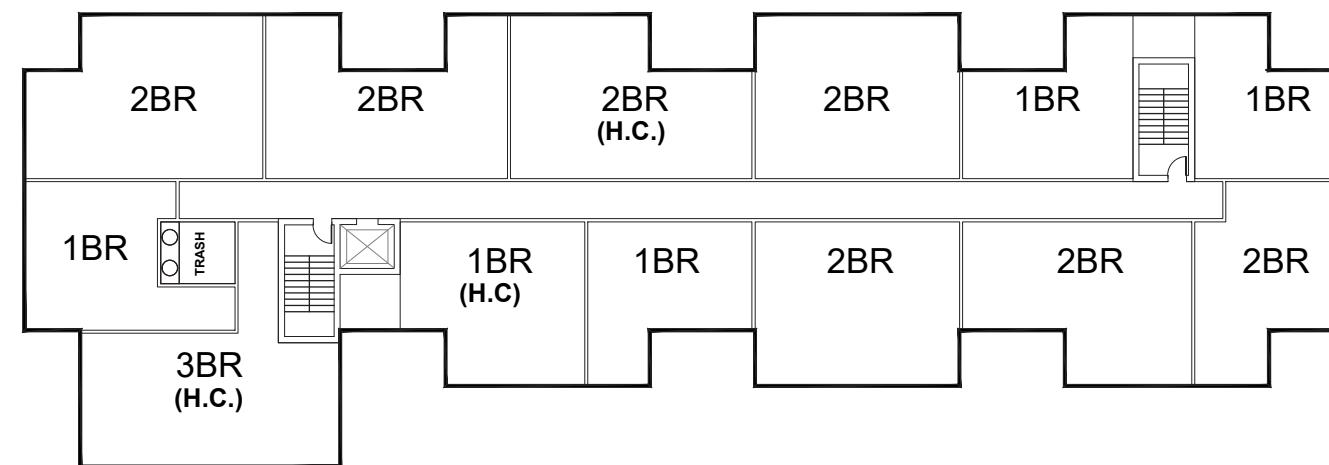
COMMUNITY APARTMENTS

THIRD FLOOR



COMMUNITY APARTMENTS

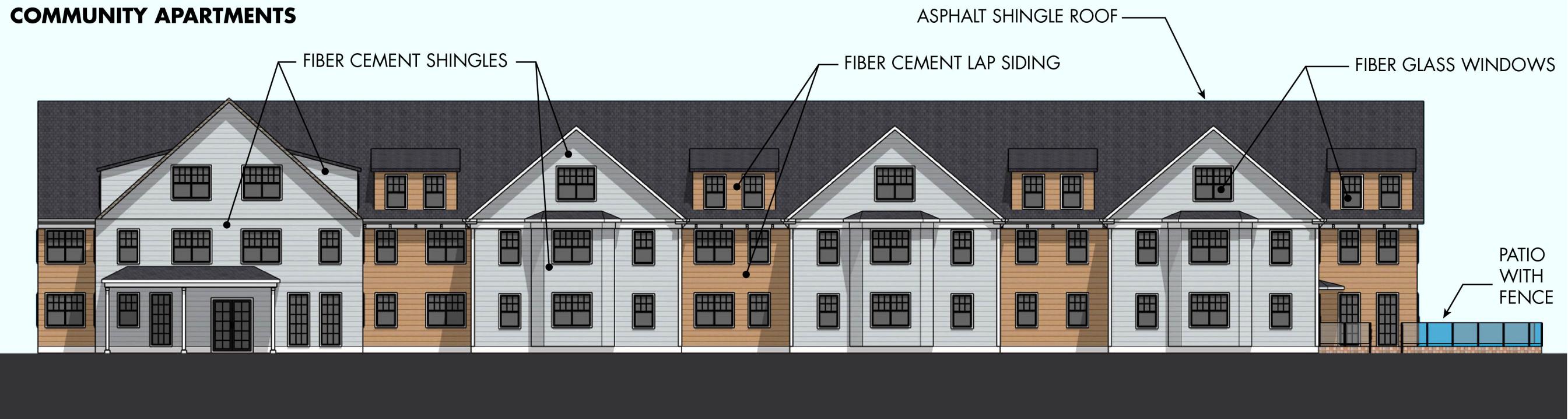
SECOND FLOOR



PACKARD STREET HOUSING | The Hudson Municipal Affordable Housing Trust | Metro West Collaborative Development

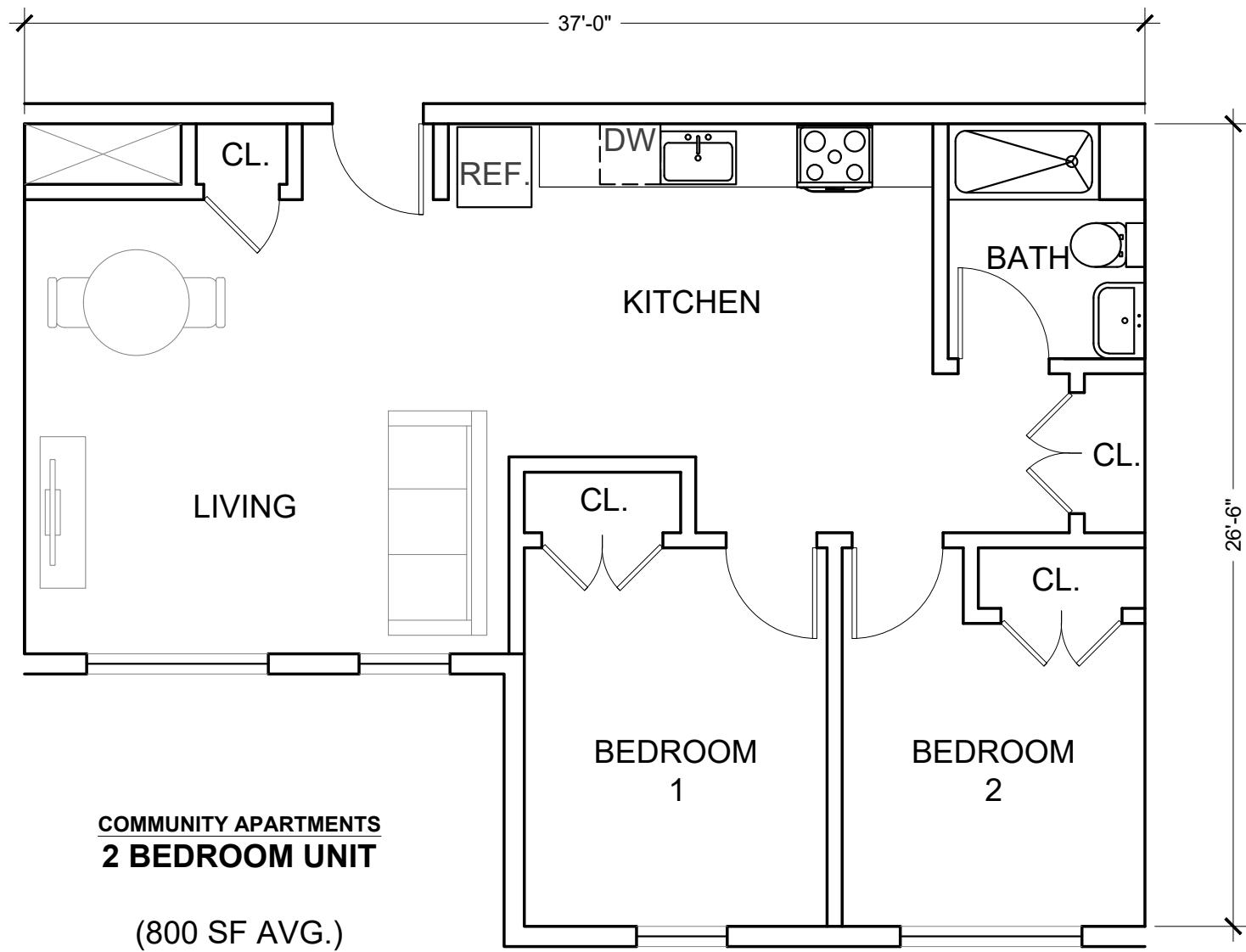
FLOOR PLANS

COMMUNITY APARTMENTS

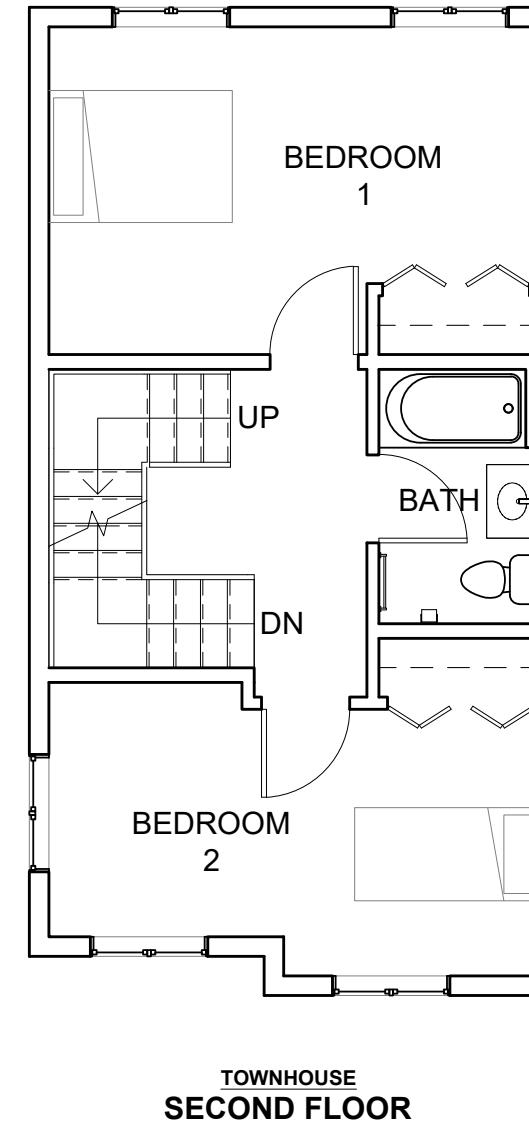
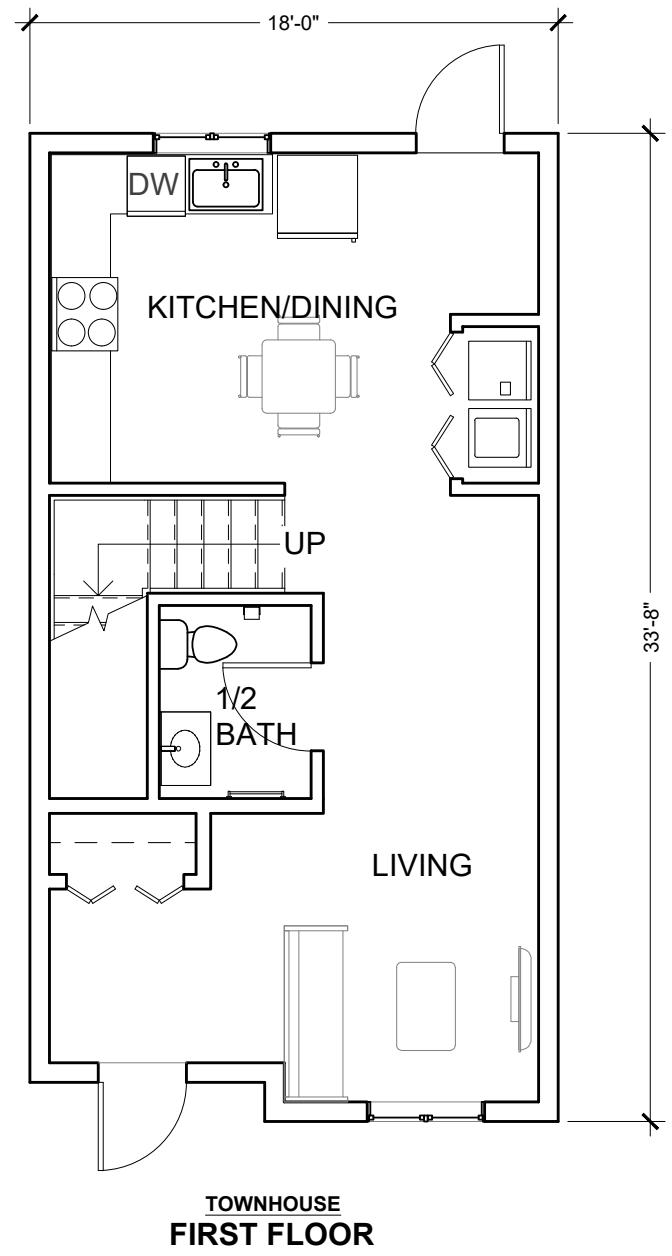


TOWNHOUSES

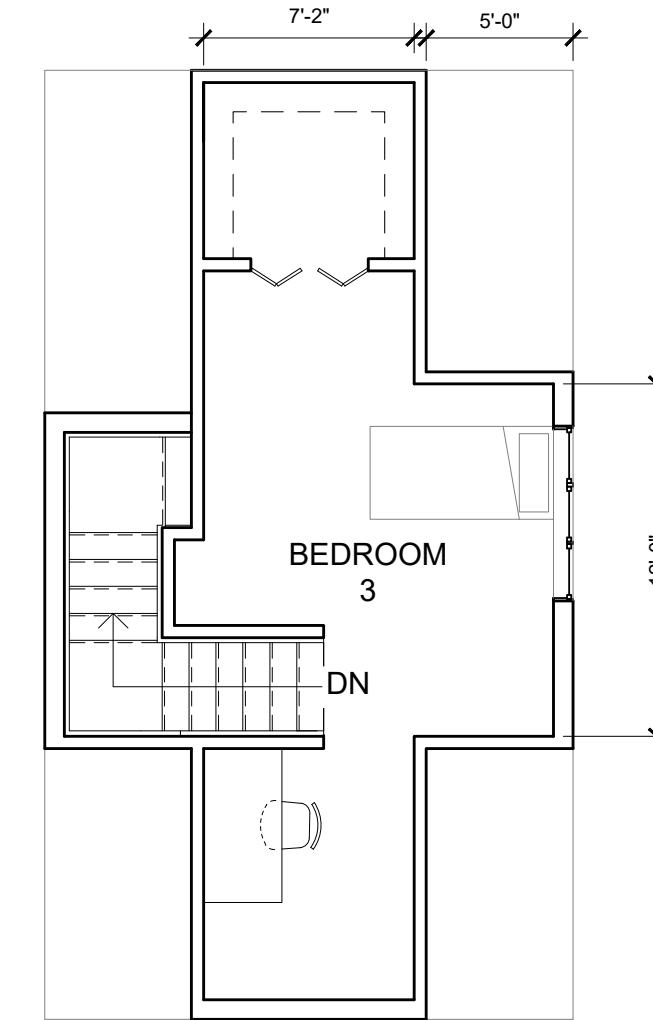




TYPICAL UNIT PLANS- COMMUNITY APARTMENTS



(2BR TOWNHOUSE 1,200 SF AVG.)



**TOWNHOUSE
THIRD FLOOR
3-BEDROOM UNIT ONLY**

(3BR TOWNHOUSE 1,530 SF AVG.)



PERSPECTIVE | VIEW FROM SITE ENTRY

PACKARD STREET HOUSING | The Hudson Municipal Affordable Housing Trust | Metro West Collaborative Development



PERSPECTIVE | VIEW FROM TOWNHOUSE

PACKARD STREET HOUSING | The Hudson Municipal Affordable Housing Trust | Metro West Collaborative Development



4

Management Plan



MANAGEMENT PLAN

Metro West CD and its management partner, Maloney Properties, Inc., have extensive experience in the lease-up and operations of affordable housing in Massachusetts. Together, we are well positioned to comply with state and federal regulations while also leasing the units quickly and maintaining robust wait lists to keep vacancies low.

Metro West CD

- Is a MassHousing approved 40B Compliance Monitor and monitors over 250 units throughout eastern Massachusetts.
- Is a DHCD approved Lottery Agent and conducts approximately a dozen lotteries annually for private developers throughout eastern Massachusetts; both affordable rental and homeownership developments. Often, these developments have a Local Preference requirement.
- Administers a “Ready Renter Program,” a DHCD approved Affirmative Fair Housing Marketing Plan for small developers who need assistance complying with affordable housing regulations. It also connects low-income households to available affordable housing opportunities. In January, 2021 the program had over 3,000 participating households.
- Has managed the lottery process and lease-up of its portfolio of 61 rental units.
- Has begun marketing for the lottery and tenant selection process at its Glen Brook Way project in Medway that will bring 48 units on line this fall.

Maloney Properties

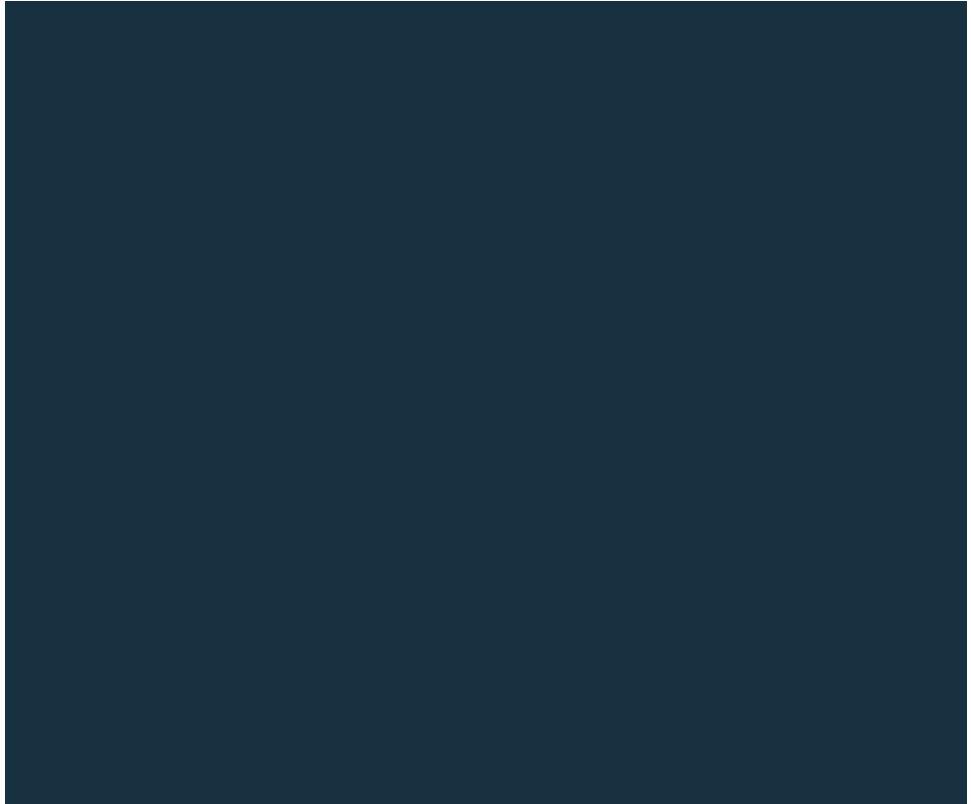
- Is a certified Women Business Enterprise.
- Manages more than 5,000 Low Income Housing Tax Credit units and has a deep familiarity with all DHCD funding programs such as Section 8, MRVP, CBH, etc. and their reporting requirements.
- Has strong financial reporting mechanisms which allows for regular capital needs planning.
- Has a strong Resident Service Coordinators program to provide support to tenants as necessary as well as programming that helps build community within the development and neighborhood.

More information on Maloney Properties attached.



5

Implementation Plan and Timeline



IMPLEMENTATION PLAN & TIMELINE

We will aim to hit the timeline shown and, if achievable, will accelerate and start as soon as possible. Throughout the process, we would maintain open communications with Town officials regarding progress on these milestones. We have never started a project that we did not finish.

Conformance to Zoning and Other Permitting Requirements

Metro West and team will work cooperatively with the town through the Friendly 40B process. We anticipate requesting relief on Parking (Proposed Ratio is 1:1) and rear setback (20' at rear is proposed, when 30' is required by base zoning).



MILESTONE	DATE
Developer selection by Town	April 2021
Purchase & Sale execution	April 2021
Architectural and engineering work commence	April 2021
Due Diligence	May 2021
Execution of Land Disposition Agreement	July 2021
Presentation of preliminary plans to town boards and department heads	July 2021
Submit request to Hudson Affordable Housing Trust	August 2021
Comprehensive permit site eligibility submission to DHCD	August 2021
Site eligibility letter received	September 2021
Submit application to Hudson ZBA for comprehensive permit	October 2021
DHCD pre-application submission	October 2021
Receive comprehensive permit approval	December 2021
Submit DHCD One Stop application (most likely twice)	January 2022 / September 2022
DHCD funding decision announced	December 2022
Final construction set of drawings and pricing. Building permit requested.	March 2023
Acquisition and construction financing closing	July 2023
Construction begins	July 2023
Marketing begins	February 2024
Construction of last building substantially complete	October 2024
Last building occupancy	January 2025



6



Scoring Matrix

SELF-SCORING ANALYSIS

The Metro West CD development team proposal meets all of the minimum criteria demonstrated by the following:

- The development team has included all of the submission requirements as outlined in Section VI of the RFP.
- Metro West CDC has more than five years of experience developing affordable housing.
- Metro West CDC and its team members have a successful track record of similar projects; Metro West CD has provided three references.
- Metro West CDC and its team have staff that are available and that have the expertise to work towards permitting within 30 days of executing the Land Disposition Agreement.
- All required forms have been completed and are included in this response.

Developer Experience: Projected Score = 15 points

DEVELOPER EXPERIENCE	COMMENTS	PROJECTED SCORE
Outcome of comparable projects	Metro West CD has successfully completed four affordable rental housing developments, housing 43 low-income elderly households and 26 family households, including housing for persons with disabilities. New Seasons Development (NSD) has served as the development consultant on three completed rental housing projects creating 153 affordable rental residential units. DSA has designed numerous high quality affordable housing developments throughout the Commonwealth.	HA- 3
Demonstrated Familiarity with 40B	Metro West CD recently completed the development of 236 Auburn Street in Newton under the 40B permitting process. It has also permitted the Glen Brook Way project in Medway as a 40B, with Phase I (48 units) currently under construction. NSD is providing or provided development consulting services on three LIHTC projects that are also Chapter 40B projects; NSD has also assisted at least three 40B non-LIHTC developers successfully apply for a Project Eligibility Letter from MassHousing. In addition, in her role as the LIHTC Director for DHCD, Wendy oversaw the review of requests for project eligibility letters and final approval, and 40B cost certifications, as well as worked on 40B policy matters. Davis Square Architects has been the project architect on numerous 40B projects.	HA- 3
Demonstrated experience financing affordable housing developments	Since beginning at Metro West CD, Jennifer Van Campen has directed the acquisition, financing and regulatory compliance of two new construction projects and two renovation projects with financing of more than \$30.6M. Since starting NSD, Wendy Cohen has served as a development consultant assisting developers with the financial structuring of their deals. Both Jennifer and Wendy have in depth experience with the regulatory requirements and application processes of federal, state and local resources.	HA- 3
Demonstrated experience in and capability for designing, permitting, developing, and constructing similar residential projects	Metro West CD and its team have extensive experience in designing, permitting, developing, and constructing similar residential projects. Project examples provided by key team members include evidence of each members' capacity to complete a residential project from project conception to full operations.	HA- 3
Past experience in hiring local and WBE and MBE-owned firms for the design and construction of affordable housing developments	Metro West CD prioritizes the inclusion of WBE and MBE firms as part of their development team. For this project, the following firms are WBE: NSD, Maloney Properties, Nitsch Engineering, and RBLA Design, LLC. RWM Engineering, Inc. is an MBE firm. Further, LD Russo has a successful track record of hiring Section 3 and M/WBE workers and contractors.	HA- 3

Affordability: Projected Score = 9 points

AFFORDABILITY	COMMENTS	PROJECTED SCORE
Provides a range of affordability for households earning at or below 60% AMI for the Boston-Cambridge-Quincy SMSA, and to the greatest extent feasible, the adjacent Worcester and Fitchburg SMSA's	Our proposal creates 40 affordable rental units for households earning up to 60% AMI for the Boston-Cambridge-Quincy SMSA. Our proposal includes 13 units affordable to households earning up to 30% AMI with financial support through project-based subsidies. The pricing for the 60% AMI units is projected at 50% AMI rents for the Boston-Cambridge-Quincy SMSA in order to reflect rents affordable in the local market.	HA- 3
Provides a clear analysis of the levels of affordability, the mix of units, and the income levels to be served	Our proposal creates 40 housing units affordable to households earning up to 60% AMI, of which, with the support of project-based subsidies, 13 will be affordable to households earning up to 30% AMI. The unit mix includes 13 one-bedroom, 22 two-bedroom, and five three-bedroom units. This unit mix meets DHCD's LIHTC requirements of 65% two-and three-bedroom units, including 10% as three-bedroom units.	HA- 3
Demonstrated experience in financing development projects with deep affordability	Metro West CD has developed 69 affordable rental units and has 92 in the construction pipeline, the majority of which are affordable to 30% AMI, 50% AMI, and 60% AMI households. NSD has assisted developers with the financial structuring of affordable housing, of which all projects have included affordability as low as 30% AMI.	HA- 3

Building Design Elements: Projected Score = 15 points

BUILDING DESIGN ELEMENTS	COMMENTS	PROJECTED SCORE
High quality exterior design to blend with and compliment the architectural style of the surrounding neighborhood.	Building design elements incorporate architectural components of the homes in the neighborhood. The rear elevator building incorporates roof lines that are found in abutting properties and provides various articulations to break down the building size. The townhouse buildings on Packard Street, are separated into three buildings with varying heights to reflect spatial expression found across the street.	HA- 3
Building design prioritizes energy efficiency elements to reduce tenants' energy, water usage and cost and limit environmental impacts and meets the LEED standard in full or partially.	New Ecology is a leader in sustainable building design. Its role is to advise the project team on sustainability methods that will reduce the carbon footprint of the building and help minimize energy costs for tenants. A project feasibility study will be completed to determine the most efficient systems for the project. Our goal is to meet Passive House standards, but we plan to at least meet LEED Silver certifiable.	HA- 3
Building materials will support durability and low maintenance for tenants.	Proposed building materials that support durability and low maintenance for the tenancies are detailed in the development narrative.	HA- 3
Building design includes amenities for residents and management including community space, office space and on-site laundry.	The elevator building includes a property manager's office, community storage space, bike storage, on site laundry, and a community room. Townhouse buildings benefit from front, rear and/or side yards, and the elevator building benefits from a large patio off the community room as well as adjacent green space for outdoor recreation.	HA- 3
Building interior design and layouts accommodate a variety of household sizes and mobility needs, and includes soundproofing methods between units, and elevators to the greatest extent feasible.	By offering a mix of unit sizes, the building can accommodate a variety of household sizes. The project will exceed minimum accessibility requirements by providing five fully accessible units, three of which will be enhanced CBH units. All units will incorporate universal design strategies and support aging in place by providing adaptable features. All of the townhouses will have visitable first floor spaces with a bathroom on that floor. Soundproofing between units is of upmost importance in family housing. As we consider finish materials and floor assemblies, the design will meet or exceed stringent code requirements for providing soundproofing between units and between floors.	HA- 3

Site Layout and Design: Projected Score = 15 points

SITE LAYOUT AND DESIGN	COMMENTS	PROJECTED SCORE
Description of how the site design and site layout generally reflect the project design guidelines	Our proposal creates multiple buildings, with varying heights of 2 and 2.5 stories. Townhouses are clustered in small groups that reflect the scale and proportions of surrounding residential homes. Both buildings incorporate roofline articulation reflective of abutting properties and a variety of setbacks to break down the scale of the site. Our design incorporates multiple landscaped areas and open space. The parking lot makes efficient use of space, incorporates traffic calming measures and buffers edges with sidewalks, landscaping and benches.	HA- 3
Description of how the site design will facilitate efficient, safe internal traffic flow and emergency access for public safety officials	Internal traffic flow is designed to maximize safety and create an efficient, one-way flow through the site. The entry and egress are located on both ends of the site to provide additional setback from abutters and to condense parking between the buildings in the rear, hidden behind the townhouse structures. Vehicle lanes are wide enough for emergency vehicles providing access to all buildings. There is designated service parking and handicapped accessible parking close to the entry of the elevator building. Landscaping is used to soften the edges of the parking area; compact parking spaces are included.	HA- 3
Description of how the site design and layout will handle exterior lighting to enhance safety and minimize light pollution and impacts to adjacent properties.	Site lighting will be provided by a mix of building mounted lighting and pole lighting and bollards. All lighting elements will be dark sky approved so as not to bother the neighbors and residents. Lighting will be used to provide enhance visibility for security reasons along driveways, walkways, at entries, the parking lot and the patio. As the exterior lighting design is further developed with our engineers, we will take into account views and location of windows in our own and neighboring buildings.	HA- 3
Description of how the landscaping plan will include native plantings and, when feasible, will buffer the development from adjacent neighbors.	Our team includes a landscape architect who will work with us to preserve as many trees as possible especially along the property line that serves as a natural buffer to neighboring properties. A further description of the site buffering strategy can be found in the design narrative.	HA- 3
Description of how the site design and layout will accommodate community amenities such as gathering spaces and bicycle racks.	The site layout allows for residents of the buildings to gather in the community room, which also spills outdoors onto a patio with an adjacent green space/play area. Benches are provided in front of the building to sit with family members and neighbors. Bike storage is available inside, as well as outside at the lobby entry. The Townhouse homes offer individual front yard spaces, reflective of other properties along Packard Street.	HA- 3

Financial Feasibility: Projected Score = 6 points

FINANCIAL FEASIBILITY	COMMENTS	PROJECTED SCORE
Pro-forma demonstrates financial feasibility of proposed development and operating budgets	The pro forma relies on a variety of public resources and debt to create a balanced budget. The project sources were carefully selected to meet per unit and per project maximums and project affordability requirements. The 10-year operating budget shows a minimum DSCR of 1.20. Letters of interest from an equity investor and construction and permanent lenders are included in our proposal.	HA- 3
Demonstrated track record of securing financing for affordable housing development, especially for those that offer deep affordability.	Metro West CD has successfully completed four affordable rental housing developments, of which three used LIHTC, and has one 48-unit 9% LIHTC project under development. The majority of these units offer deep affordability. NSD has served as the development consultant on three completed LIHTC housing projects, creating 153 affordable rental residential units, which also provide affordability tiers below 60% AMI. NSD has closed on financing for four other projects that are currently under construction, two of which use 4% LIHTC and state subsidies and two of which are using 9% and State LIHTC and state subsidies. Three more projects are in closing; all include state subsidies and one uses 9% and State LIHTC, while another uses 4% LIHTC. NSD has experience using all of the sources contemplated in the Hudson police station development budget.	HA- 3

Building Management: Projected Score = 9 points

BUILDING MANAGEMENT	COMMENTS	PROJECTED SCORE
Demonstrated long-term rental management experience or long-term relationship with a rental management company.	Maloney Properties has provided property management services for 40 years. Maloney is the property manager for 43 units owned and operated by Metro West CD and will manage the 48 in construction.	HA- 3
Demonstrated success in marketing approach, including affirmative fair housing marketing plans and lottery, meeting State requirements.	Maloney Properties has successfully prepared and carried out affirmative fair housing marketing and tenant selection in accordance with state requirements. Metro West CD is a DHCD and MassHousing approved affordable Housing Monitor and Lottery Agent.	HA- 3
Past experience in hiring local and WBE and MBE-owned firms for the management of the development.	Maloney Properties is a WBE firm with 20% minority ownership. Their staff members represent the communities in which they work. They have over 400 employees, 52% of whom are Asian, African-American, and Latino.	HA- 3



7

Required Proposal Contract Forms

- Exhibit A- Proposal Signature Page
- Certificate of Vote
- Addendum #1 Acknowledged
- Addendum #2 Acknowledged
- Exhibit B- Exceptions
- Summary of Comments on the Proposed P&S and LDA
- Exhibit C- Certificate of Non- Collusion Exhibit
- Exhibit D- Certificate of Tax Compliance
- Exhibit E- Certificate of Authority
- Exhibit F- Debarment Clause

Exhibit A

Proposal Signature Page

Town of Hudson RFP for sale of land located at 62 Packard Street, Hudson, MA.

Metro West Collaborative Development

Company Name
79-B Chapel St.
Street
Newton MA 02458
City, State, Zip
jvc@metrowestcd.org
Email

Jennifer Van Campen

Contact Person (please print)
617-923-3505
Phone
Fax

Submits the attached Proposal to the Trust, on the authority of the undersigned and as dated below. I confirm and pledge to abide by and be held to the requirements of this RFP and its resulting Purchase and Sale Agreement and Land Disposition Agreement, to perform any tasks and deliver any documents required, and to execute a Purchase and Sale Agreement with the Town of Hudson.

Bidder acknowledges receipt of the following addenda.

1. Addendum I
2. Addendum II

3. _____
4. _____

Individual or Authorized Agent of the Contractor:


Signature (blue ink please)
Jennifer Van Campen
Printed Name
Ex. Director
Title
3/19/21
Date



If a corporation, attach
certificate of vote or apply
corporate seal here)

Form must be signed by a duly authorized officer(s) eligible to sign contract documents for the firm. Consortiums, joint ventures, or teams submitting proposals will not be considered responsive unless it is established that all contractual responsibility rests solely with one contractor or one legal entity. The Proposal must indicate the responsible entity.

Contractor should be aware that joint responsibility and liability will attach to any resulting contract and failure of one party in a joint venture to perform will not relieve the other party or parties of total responsibility for performance.

** to be filled in by proposer, if addenda are issued.*

April 6, 2021

Certificate of Vote

I, Alisa Gardner-Todreas, (Assistant Clerk) of Metro West Collaborative Development, Inc. hereby certify that at a duly called meeting of the Board of Directors of Metro West Collaborative Development, Inc. on March 25, 2021, it was unanimously voted to authorize the submission of a response to the Town of Hudson's Request for Proposals for 62 Packard Street. It was also unanimously voted to authorize the Executive Director, Jennifer Van Campen, to execute any and all documents required in connection with said response with the Town of Hudson. This vote remains in full force and effect.

Alisa Gardner-Todreas

Alisa Gardner-Todreas
Clerk

ADDENDUM #1 ACKNOWLEDGED

62 Packard Street Affordable Housing Development – Addendum 1

1. Is there a scenario where single story building would be acceptable? Preliminary studies indicate less impact to site, larger landscape buffer areas, inefficiencies of building 2 elevator cores.

The Re-Use Committee considered a variety of building types and site plan configurations for the parcel, including trade-offs with regard to building efficiency, setbacks, parking, etc. The Development Guidelines provided in the RFP provide a summary of the Re-Use Committee's preferred approach for the site.

2. Environmental 21E Phase 1 & Phase 2.
 - a. Is there a reason the Town thinks that a Phase 2 will need to be completed, ie known contamination from prior uses?

The Phase 1 Environmental Assessment is complete and available at:

https://williamsonenvironmental.sharepoint.com/:b/s/ExternalSharingSite/Ed7_i1Km_5hApgHNO4Ep_00B4829jvVBjfgK_0hF2ILi0g?e=Eu6kAL

No RECs were identified; therefore, a Phase 2 Assessment is not warranted. A hazardous materials assessment will be completed for the preparation of demolition documents.

3. When will the environmental studies and any clean up/remediation work be conducted? Language in the RFP appears to conflict with language in the draft P&S as related to environmental 21E studies and assignment of responsibilities as well as cleanup (if required).

The P&S was a sample only. 21E, remediation, and demolition will be completed before the title to the property is transferred.

4. When will demolition of the existing building be conducted?

After the P&S is signed.

5. 21 day due diligence period is very short for a development of this kind, especially to be able to undertake geotechnical studies. Is there an opportunity to extend?

This can be negotiated.

6. Concerning the Town Meeting vote, the vote references a 40,000 square foot parcel (0.99 acres). This does not align with the property description in the RFP or the current assessor record that shows 83,124 square feet. Can you address this discrepancy?

The property is 1.9 acres, 83,124 square feet. We have been told by Town Counsel that the incorrect area in the warrant article, along with some other incorrect descriptive information, are scriveners errors. He is currently determining the appropriate way to correct them.

7. Does the Affordable Housing Trust anticipate a contribution of additional funds for the development as an additional "local match"?

The Trust has expressed willingness to contribute additional “local match”, however the amount available depends on the cost of demolition.

7. Can you clarify what you mean by neighborhood support?

The Town formed an ad-hoc committee that consisted largely of neighborhood residents. The residents discussed the potential project and the community needs in great detail, and became strong advocates of the idea. They are also anxious to see the deserted building demolished and the site be put to good use. The Town Meeting vote showed overwhelming support for transferring the property to the Affordable Housing Trust.

8. Will this project have to go back to Town Meeting at any point?

The project itself does not have to go back to Town Meeting. It is possible we will need Town Meeting to correct the scriveners errors (see Question 4).

9. Is there public transportation on the street?

No. There is a local shuttle service that could potentially add a stop.

10. Where is the nearest school?

Farley Elementary School is less than half a mile down the street.

11. How many schools are there in Hudson?

One high school, one middle school, and 3 elementary schools. In addition there is a regional technical high school.

12. Will the housing be targeted to any particular demographic?

No, it is open to anyone who qualifies.

13. Is Town water and sewer available?

Yes. Capacity will be determined during Design Review.

14. Are electricity and gas connections available?

Yes, the existing building is served by Hudson Light and Power and Eversource Gas.

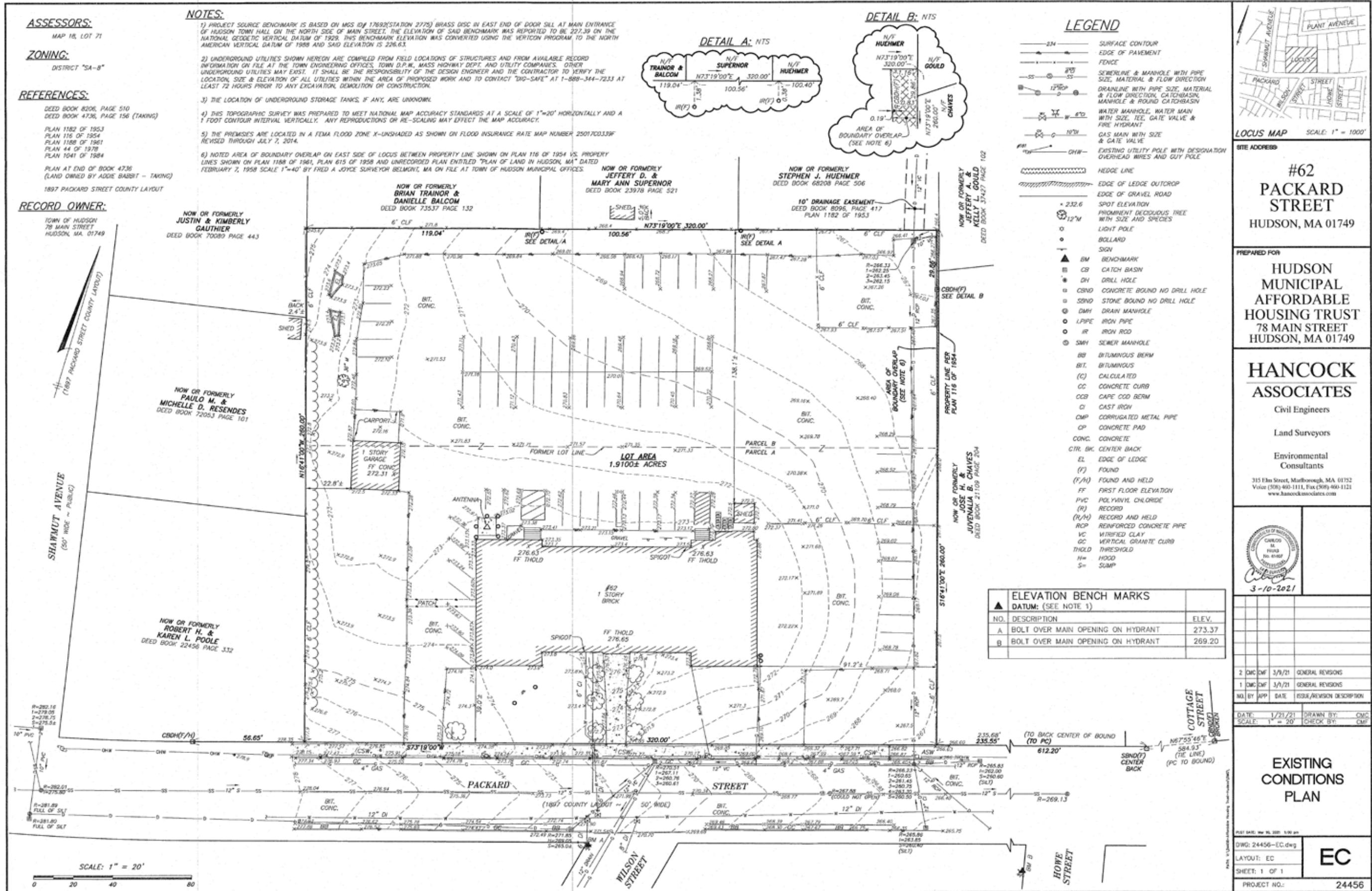


EXHIBIT B

Exceptions

Any exceptions taken to the conditions or specifications cited herein must be clearly stated below.



I have exceptions to the conditions and/or specifications noted below.

Please see attached suggested edits to the
Purchase + Sale and Land Disposition
Agreement.

Signature (blue ink please)

Jennifer Van Campen

Printed Name

Executive Director

Title

3/19/21

Date

SUMMARY OF COMMENTS ON THE PROPOSED P&S AND LDA

Comments on Purchase and Sale Agreement

We ask that the P&S document be entitled “an Option to Purchase” to avoid any choice limiting prohibition concerns that might emerge should federal Housing and Urban Development programs be utilized by the project. We do not want to make any choice limiting actions (by for example, signing a P&S agreement) which could affect our ability to use HOME funds or project-based Section 8 contract funding, before obtaining Environmental Review Release of Funds letter(s) from HUD.

- Section 11 should be amended to provide for the fact that the closing cannot occur until after the Approval Date, as defined in Section 19.
- Section 18- Termination. The due diligence contingency period of 21 days appears too short for site investigations (such as suspect asbestos containing material identification and testing, and market studies). We would suggest a longer period, such as 30-45 days.
- Section 19 should explicitly include in the definition of Approvals a) NEPA clearance b) Subsidy Layering Approval and 3) all Financing approvals.

Town will record a Certificate of Completion and the LDA will then be terminated.

Comments on the Land Disposition Agreement

Article 2

We would like the Town to commit to joining the MassDocs Affordable Housing Restriction in this section. In Article 2.2, please note that deeper affordability commitments (less than 60% of Boston SMSA) should be carefully structured and be subject to the MassDocs “financial infeasibility” language so as to avoid any future financeability issues. In Article 2.4, we will need to make clear that we cannot close until after the Approval Date, per the definition in Section 19 of the Purchase and Sale Agreement.

Article 4

Article 4.2 Please provide for extensions of certain milestones in the Project Development Schedule to accommodate delays in permitting and project funding awards, and any force majeure events.

Article 5

Article 5.1.1 should be subject to force majeure carve out.

General comment

We need a concept and agreement that once the sponsor achieves project completion (i.e., once the Town has issued a Certificate of Occupancy for the units in the development), the

Exhibit C

THE TRUST

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid 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.

ADDRESS 79-B Chapel St.
Newton MA 02458 SIGNATURE 
NAME (print) Jennifer Van Campen TITLE Executive Director

TELEPHONE: 617-923-3505 DATE 3/19/21

Exhibit D

THE TRUST
STATE TAXES CERTIFICATION CLAUSE

I certify under the penalties of perjury that, I, to my best knowledge and belief, have complied with all laws of The Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Metro West Collaborative Dev., Inc.



* Signature of individual or
Corporate Name (mandatory)

Corporate Officer
(if applicable)

22-3073668

** Social Security Number or
Federal Identification Number

* Approval of a contract or other agreement will not be granted unless this certification clause is signed by the applicant.

** Your Social Security Number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of MGL C 62c, §49A

Exhibit E

CERTIFICATE OF AUTHORITY

At a duly authorized meeting of the Board of Directors of

(Name of Corporation)

it was VOTED that Jennifer Van Campen, Executive Director
(Name and Title)

of this company is authorized to execute contracts and bonds of and on behalf of this company, and affix its corporate seal hereto; and such execution of any contract obligation in this company's name and on its behalf, said obligation to be valid and binding upon this company.

A True Copy

Attested,

Company Name

Metro West Collaborative Dev., Inc.

Address:

79-8 Chapel St. Newton MA 02458

Name & Title of Signatory:

SUNEEETH P. JOHN
PRESIDENT
03.22.2021

Date:

I hereby certify that I am the Clerk of Metro West Collaborative Dev., Inc.
(Name of Corporation)

that the above vote has not been amended or rescinded and remains in full force and effect as of the date of this contract.

Name of Clerk:

Allisa Gardner-Todreas Allisa Gardner-Todreas

(Corporate Seal)

Exhibit F

DEBARMENT DISCLOSURE FORM

PUBLIC CONTRACTS - DEBARMENT CHAPTER 550, ACTS
OF 1991

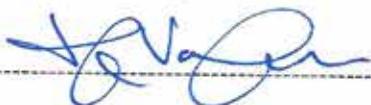
The said undersigned certifies under penalties of perjury that the said undersigned is not presently debarred from doing public construction work in the Commonwealth of Massachusetts under the provisions of Section 29F of Chapter 29 of the General Laws, or any other applicable debarment provisions of any other chapter of the General Laws, or any Rule or Regulation promulgated there under.

Date:

3/19/21

Metro West Collaborative Development

(Company)



(Signature)

Jennifer Van Campen, Executive Director

(Print Name & Title)

79-B Chapel St.

(Address)

Newton MA 02458

(City, State, Zip)

8

Appendix

- Metro West Collaborative Development
- New Seasons Development, LLC
- Anser Advisory, LLC
- Maloney Properties, Inc.
- Davis Square Architects, Inc.
- L.D. Russo, Inc.
- BLW Engineers, Inc.
- RWM Engineering, Inc.
- Nitsch Engineering, Inc.
- RBLA Design, LLC
- New Ecology, Inc
- Klein Hornig, LPP

Metro West Collaborative Development

Real Estate Development Experience

Glen Brook Way, Medway – 2017-2021

Initially conceived as a 48-unit rental development, the Town of Medway encouraged Metro West CD to expand the project and an additional 44 units were added in 2018. The project will utilize \$2 million in local Community Preservation Act funds and has applied for various Dept. of Housing and Community Development subsidy sources. The property will be affordable in perpetuity. It was permitted under Chapter 40B and helped the Town obtain a “Safe Harbor.” Construction began during the pandemic of 2020. Occupancy of Phase I is expected fall of 2021. The total development cost for all 92 units will be \$41.6 million.



236 Auburn St., Newton – 2016-2020

This circa 1868 house was relocated on the site and behind it were built two duplex units and a 5-bedroom congregate house which was sold to the Price Center. The project was awarded a Chapter 40B comprehensive permit in 2018 and secured all state and local funding to begin construction in early 2019. Total development cost for the 8-unit project was \$4.1 million.



Herring Brook Hill, Norwell – 2016-2019

This former Town owned Police Station, located in Norwell, is now home to 18 rental units for elderly households. Metro West CD won the development rights to the site through a competitive Request For Proposals process administered by the Norwell Community Housing Trust. The project utilized local Community Preservation Act funds, various Dept. of Housing and Community Development subsidy sources and a private loan from Eastern Bank for a total development cost of \$6.6 million. The property will be affordable in perpetuity. It was permitted under Chapter 40B. It was occupied in late 2019.

St. Joseph Hall, Watertown – 2014

This former Catholic School was converted into elderly apartments in the 1980s by the Dominican Sisters of Peace. After 25 years, the Sisters could not keep up with the capital repairs needed by the historic building. Also, the property had a Section 8 contract that was nearing its expiration. Metro West CD purchased the property and assembled the financing to undertake a \$5.5 million project that will keep the 25 apartments in top condition and permanently affordable.



1060 Belmont Street – 2010

This blighted 18-unit rental property was purchased by Metro West CD in 2008 for \$2.1 million. Over the next two years \$3.4 million was raised to renovate the apartments and create three handicapped accessible units. Funds used included: Low Income Housing Tax Credits, HOME Program, Federal Home Loan Bank's Affordable Housing Program, Community Based Housing Initiative and a private loan from Watertown Savings Bank.

CURRENT WORKLOAD

PROJECT & LOCATION	TYPE	STATE OF COMPLETION	DURATION	COST	CONTRACTOR CONTACT
Glen Brook Way Medway, MA	<ul style="list-style-type: none"> • New construction • 100% affordable housing • 48 unit family 	Under construction	Occupancy expected October 2021	\$21.1M	<p>Greg Inman, Project Executive Dellbrook JKS 15 Research Rd East Falmouth, MA 02536 508.889.7269 ginman@dellbrookjks.com</p>
Glen Brook Way, Phase II Medway, MA	<ul style="list-style-type: none"> • New construction • 100% affordable • 44 units senior 	Fully permitted, awaiting DHCD allocation of subsidies	Projected to break ground Spring 2022 and occupancy expected Fall 2023	\$20.5M	

REFERENCES

Reference |

Gregg McBride, Member Norwell Community Housing Trust

Community Housing Trust, Town of Norwell

781-659-8000 | ggreggmcbridenorwell@gmail.com

Project Referenced: Herring Brook Hill (18 affordable senior apartments)

Reference |

Barbara St. Andre, Director Community and Economic Development

Community and Economic Development, Town of Medway

508-321-4918 | bsaintandre@townofmedway.org

Project Referenced: Glen Brook Way (92 unit family and senior apartments)

Reference |

Amanda Berman, Director of Housing and Community Development

Department of Planning & Development, City of Newton

617-796-1147 (Direct) | aberman@newtonma.gov

Project Referenced: 236 Auburn St. (8 unit family apartments)



Jennifer Van Campen

51 Harvey St.
Cambridge, MA 02140
(781) 640-3027
jvc@metrowestcd.org

Professional Experience

Executive Director Metro West Collaborative Development, Inc. 2007 – present

- Conduct all fundraising, financial management, program reporting and management of staff.
- Primary lead on all aspects of the permitting and pre-development of three new construction rental developments totaling 152 units. 92 break ground summer 2020.
- Oversee property and asset management of 62 rental units including affirmative marketing plan, income eligibility determination and on-going maintenance.
- Oversee affirmative marketing of affordable units for municipal and private owner clients.
- Provide housing policy and advocacy support to five area Housing Partnerships.
- Oversaw acquisition, financing and regulatory compliance of :
 - \$6.6 million construction of Herring Brook Hill, 18-unit elderly rental development
 - \$4.1 million construction of 236 Auburn St., 8-unit family/disabled rental dev.
 - \$5.4 million renovation of St. Joseph Hall, a 25-unit elderly rental development
 - \$5.5 million renovation of 1060 Belmont, an 18-unit family rental development
- Led the expansion of Metro West CD services into other communities including the provision of affordable housing monitoring services and program management in over a dozen towns throughout eastern Massachusetts.

Executive Director Waltham Alliance To Create Housing (WATCH) 1998-2005

- Created and implemented an organizational plan including: 3-year strategic plans; 1-year community organizing, affordable housing development and workforce training work plans; and \$350,000 annual operating budget fundraising strategy.
- Oversaw the development of real estate development staff and programs including site acquisition, neighborhood resident involvement, financing, design and construction of 21 units of rental and homeownership housing with total development costs of over \$4 million.
- Initiated the first formal Board and leadership training process.
- Supervised staff and volunteers in the implementation of a Tenant Training Program, First Time Home Buyer Program, English for Employment and numerous community organizing campaigns involving over 400 people annually resulting in significant local and state-wide public policy achievements.
- Launched the organization's first capital campaign raising nearly \$100,000, which then leveraged an endowment campaign raising an additional \$50,000.
- Established partnerships with neighboring towns and regional organizations resulting in a new health care training initiative with two major health care providers and the construction of a four-unit condominium project outside of Waltham.

Assistant Director Bridgeport Artisan Center 1998

- Lead author of organizational restructuring including creation of in-house production and employment strategy and transition to independent non-profit status.
- Co-led the start up of in-house production facility including: site improvements, hiring strategy, materials identification, logistics and product development.

Yale Community Renaissance Fellow Housing Authority City of Pittsburgh 1997

- Was one of 20 people selected nationally to participate in this inaugural fellowship program funded by the U.S. Department of Housing and Urban Development and coordinated by Yale University to provide support to the nation's most troubled housing authorities.

- Project manager of the \$117 million Allequippa Terrace revitalization effort which involved the demolition of 1,500 public housing units; reconstruction of 1,200 public housing and market rate units; relocation of 500 families; establishment of “self-sufficiency” plans for 450 families; and creation of a general partnership between the residents and the developer.

Executive Director Citizens for Action in New Britain (CANB) 1992-1996

- Assisted in the creation of work plans for eight issue groups with a total constituency of over 1,200. Developed strategies addressing a variety of community issues including: affordable housing, economic development, Medicare/Medicaid reform, neighborhood stabilization, community reinvestment, crime prevention and tax issues.
- Planned annual leadership training process including a retreat, statewide and regional conferences, summer training series and inter-organizational planning meetings.
- Researched and initiated partnership projects with other non-profit agencies such as the New Britain Area Conference of Churches, Chamber of Commerce and Trinity College.

Community Organizer Citizens for Action in New Britain (CANB) 1990 – 1992

- Identified and trained resident leaders to develop strategies to improve their community. Responsible for building three issue groups with memberships of 30-75.
- Assisted in the creation of a home ownership initiative that created a \$7 million First Time Home Buyer Program involving five local banks and the City of New Britain.

Lecturer Connecticut Colleges 1992 - 1995

- Presented workshops on “Basics of Community Organizing” to human service and social work students at Tunxis Community College, Central CT State University and Trinity College.

Coach Track and Field 1991 – 2001, 06-07

Nonnewaug (Head), Hall, New Britain, Waltham and Watertown High Schools (Assistant)

- Developed training programs for 75 youth in all of the high school field events.

Volunteer Experience

Volunteer, VNA Care Network 2015-present

- Provide companionship to hospice patients and their families at DeRham House, Cambridge

Volunteer, First Unitarian Universalist Society of Newton

- Religious Education teacher 2013 - present

Member, Massachusetts Association of Community Development Corporations

- Board of Directors 2017 - present
- Member, Policy Committee 2009 – present
- Chair, Church-Closing Committee 2005
- Chair, Legislative Committee 2001 – 2003

Education and Certifications

Spectrum C3P Low Income Housing Tax Credit Certification 2011

National Development Council – Housing Development Finance Professional Certification 2009

Southern New Hampshire University – M.S. in Community Economic Development 1998

Trinity College, Hartford, CT – B.A. in Urban Studies 1990

CLAIRE MORTON, MBA

Boston, MA · 617.980.3773

morton.ctc@gmail.com · www.linkedin.com/in/clairemortonmba

EXPERIENCE

OCTOBER 2019 – PRESENT

SENIOR PROJECT MANAGER, METRO WEST COLLABORATIVE DEVELOPMENT; NEWTON, MA

- Oversee financing and compliance of a \$21 million, 44-unit rental community
- Prepare required construction related materials for applications for funding
- Collaborate with subcontractors, engineers, architects and key team members of the development team
- Review, recommend and approve submittals, RFIs, change orders, and pay requests
- Negotiate with external vendors on contract agreements
- Coordinate proposed changes in design with consultants while maintaining schedule and budget
- Create and maintain budgetary objectives and make adjustments to project constraints based on financial analysis

AUGUST 2018 – OCTOBER 2019

PROJECT ASSISTANT, CHAPMAN CONSTRUCTION/DESIGN; NEWTON, MA

- Collaborated with project managers and teams to maximize productivity
- Tracked and reviewed shop drawings and submittals, paying close attention to any lead-time challenges
- Ensured all documents and materials were maintained and up to date throughout project
- Maintained subcontracts, change orders, budget, RFIs, and field coordination
- Led weekly site meetings and created meeting minutes for distribution
- Obtained information to assemble close out manuals
- Consulted with executive leadership to develop, implement, and execute new workplace flexible hours policy
- Partnered with President and Vice President to develop 1-year strategic plan focused on enhancing recruitment and retention of diverse candidates

SEPTEMBER 2017 – AUGUST 2018

PERFORMANCE AND DEVELOPMENT ASSOCIATE, WOLF & COMPANY, P.C; BOSTON, MA

- Created analytical reports using Excel modeling (Linkages and Pivot Tables)
- Implemented paperless CPE tracking and reporting process using GoFileRoom software
- Coordinated calendars, monthly meetings and travel arrangements for senior level executives
- Assisted Performance and Development Senior on special projects, financial inquiries, and strategic planning
- Managed employee performance assessment process using viDesktop and BambooHR

JANUARY 2017 – JANUARY 2018

COMMUNITY RELATIONS MANAGER, HAMILTON RELAY; REMOTE/MASSACHUSETTS

- Achieved transaction completion rates of 81%
- Recorded client and product information into Oracle; 100% accuracy rate
- Monitored and allocated budget
- Communicated goals and responsibilities surrounding products and services
- Developed detailed analytical reports such as expense reports, annual report, and status reports

AUGUST 2013 – JANUARY 2017

CLIENT RELATIONS MANAGER, SIMPLY IRRESISTIBLE CUISINE; BOSTON, MA

- Decreased costs by 28% by renegotiating key account contracts
- Achieved 100% client acquisition for 6 consecutive months by effectively driving brand awareness
- Participated in on-going training and development of 8 staff members
- Evaluated market to capitalize on market opportunities; explored opportunities to expand service offerings
- Analyzed financial activities using Excel modeling (Linkages, Pivot Tables, Formulas, etc.)

MAY 2015 – JUNE 2016

DIRECTOR, YOUTH WORKERS' ALLIANCE & MISSION HILL YOUTH COLLABORATIVE; BOSTON, MA

- Led monthly meetings, trainings, workshops and seminars
- Collaborated with stakeholders to develop project plans and project risk analyses for assigned projects
- Defined key project constraints such as scope, schedule, budget, resources, and risks
- Communicated roles and expectations to team members resulting in increased team morale and efficiency
- Developed and delivered presentations i.e., agendas, annual reports, and grant proposals

EDUCATION

MBA | SIMMONS UNIVERSITY; BOSTON, MA | DECEMBER 2016

B.S., MANAGEMENT; MINOR IN ENTREPRENEURSHIP | SUFFOLK UNIVERSITY; BOSTON, MA | DECEMBER 2010

- STUDIED ABROAD IN MADRID, SPAIN.
- ACTIVE MEMBER OF ZETA PHI BETA SORORITY, INCORPORATED SINCE 2009

CERTIFICATES

PMP | PROJECT MANAGEMENT INSTITUTE | DECEMBER 2020

OSHA 10HR CERTIFICATE | CAREERSAFE | JUNE 2020

CONSTRUCTION MANAGEMENT CERTIFICATE | COLUMBIA UNIVERSITY | SEPTEMBER 2019

PROJECT MANAGER (CORE TOOLS & PROJECT MANAGEMENT) | PROCORE TECHNOLOGIES | JUNE 2019

SKILLS

COMPUTER:

- Procore
- IBM Notes
- FastTrack Schedule
- Microsoft Office Suite
- On-Screen Takeoff by On Center

LANGUAGE:

- French
- Haitian Creole

VOLUNTEER EXPERIENCE

2011 - PRESENT

CHILDREN SERVICES OF ROXBURY SHELTER

2011 - PRESENT

BOSTON CHILDREN'S HOSPITAL

New Seasons Development LLC

Selected Development Consulting Projects

CONSTRUCTION COMPLETE

O'Connor Way, South Boston: 47-unit elderly rental housing 4% LIHTC and Inclusionary Development Program project. Wendy assisted the non-profit developers with financial structuring and applications and in the closing and requisition process. The project's construction was completed in January 2021 and the property is currently leasing up.

Salisbury Square, Salisbury: 42 units of family housing on two Town-owned sites in Salisbury, involving both new construction and renovation of a former school. L.D. Russo and Greater Newburyport YWCA were the project sponsors. Project financing included 9% LIHTC and subsidies from the Commonwealth of Mass. The Town contributed AHT funds and the local HOME consortium committed HOME funds. L.D. Russo was the contractor. Construction and lease up were completed in 2019.

Congress Street Residences, Salem: 64 family rental housing units in 8 buildings, utilizing 4%/State LIHTC, Fed/State Historic Credits, preservation project. Wendy assisted a non-profit developer in forming the project structure and drafting the pro forma, writing the applications for pre-development and permanent financing, as well as in the construction closing and requisitioning process. Construction and lease-up were complete in 2017, and the project's cost certification has been approved by the Commonwealth's DHCD.

UNDER CONSTRUCTION

Sirk and Chestnut Square Re-Development, Lowell: NSD helped The Caleb Foundation refinance and renovate 87 units of existing family LIHTC housing in 13 buildings, as well as add one new 4-BR townhouse unit. NSD also spearheaded a successful application for AHP funds and assisted the developer in obtaining awards of DHCD's project-based subsidies and

a 4% LIHTC allocation to complete the financing. This project includes historic credits as a source. The project's construction closing, which NSD led, occurred in November 2020.

Glen Brook Way Apartments, Medway: NSD and Metrowest Collaborative Development are in the midst of construction on 48 units of family housing in Medway on a site with open space, using CPA funds of \$1 Million from the Town, 9% and state LIHTC, and other state subsidies. The family housing project closed on construction in August 2020; it will complete in the fall of 2021. The second phase will involve the construction of 44 units of elderly housing and is before DHCD with an application for funding. The Town has also committed a \$1 Million award of CPA funds for the second phase.

Downing Square Broadway Initiative, Arlington: NSD assisted the Housing Corporation of Arlington in developing 48 units of family housing on two sites on Broadway and Park Avenue in Arlington. The Park Avenue site involves environmental clean-up and the Broadway site will include the development of 2,500 SF of commercial space to be occupied by Arlington Eats, the local food pantry. NSD assisted in 9% credit and other soft subsidy financing applications to DHCD. Funding was awarded in February 2019, and NSD assisted in closing the transaction in winter 2020. Construction began in February 2020.

PAC 10 Lofts, Lawrence: Adaptive reuse of a historic brick mill building into 276 mixed income, family rental housing units. The first 180-unit phase of this 4% LIHTC historic project closed on its construction and equity sourcing in 2018. NSD assisted the for-profit developer with financial structuring and processing and participated in the closing process. The second phase totals 96 units. NSD prepares the funding applications to DHCD and assists in the closing process, as well as consulting to the owner through construction.

APPROACHING CONSTRUCTION CLOSING

Dracut Center School/Town Annex: Nine (9) units of 80% AMI veterans preference housing involving the adaptive reuse of a Town-owned historic school, later used as a Town Hall Annex. Coalition for a Better Acre is the sponsor. The project has an award of \$1.2

Million of CPA funding, split between the historic and community housing buckets of CPA funding, and a \$200,000 grant of Housing Choice funds from the Town of Dracut, originally made available by MassHousing to the Town. The sponsor also received awards of state historic credits and will invest the resulting equity and two foundation grants into the project. The project is expected to close on construction this month, March 2021.

The Lighthouses, Salem: This project includes 46 units on two sites, new construction Passive Haus design. Wendy assisted a non-profit developer with the program concept, design, zoning application, financial structuring and processing using 9% LIHTC, and now assists in the closing process. DHCD announced awards of 9% credits, state LIHTCs and other state subsidies for the project on March 2, 2021. Local support includes HOME and CPA funds.

Mohawk Forest, North Adams: This preservation project involves a new allocation of 4% LIHTCs and the renewal of a 128-unit Section 8 contract for 20 years. The project plans involve the refinance and renovation of a 190-unit family housing project, with an increase in the number of accessible units. The project financing will also include recommitment of some existing subordinate debt from DHCD. The project sponsor is The Caleb Foundation.

IN ZONING APPROVAL STAGE

Talbot Commons Phase II, Dorchester: As a consultant to Codman Square NDC, New Seasons is involved in the production of 42 units of family housing, using 9% credits and soft subsidies from DHCD and Boston's DND, near the Talbot Avenue MBTA stop on the MBTA's Fairmount Corridor line. The project involves the acquisition of one parcel on Talbot Avenue from the City, and the development of 19 units on that site along with 23 units of housing on New England Avenue. The Talbot Avenue site will be shared with a for-profit developer, who will develop 21 units of workforce housing. NSD assisted with the JV agreement and architectural selection process and writing the financing application to DND. NSD is also assisting with the permitting process with BPDA and ISD and in submitting pre-applications and applications to DHCD.

Chapter 40B Development Assistance

217 Kent Street, Brookline: A private developer has received NSD assistance in application submission for, and receipt of, a Project Eligibility Letter (PEL) from MassHousing to build 73 units and rehabilitate 17 units of non-age-restricted rental housing near the Longwood train station in Brookline.

Saugus Ridge, Saugus: After Toll Brothers received assistance from NSD in applying for and receiving a PEL from MassHousing, the Zoning Board of Appeals approved plans for a 300-unit apartment development off Route 1 North.

Crescent Commons, Wakefield: A private developer has received NSD assistance in applying for, and receiving, a Project Eligibility Letter (PEL) from MassHousing to build 56 units of non-age-restricted rental housing near downtown Wakefield.

Services to Municipal Entities

George Fernandes Way, Sandwich, 6-acre site in developer selection stage. Wendy aided the housing authority in the development of parameters for the RFP to potential developers of the site for 24+ units of affordable rental housing, and in reviewing the RFP responses.

Sudbury Station, Sudbury, 250-unit proposed 40B project. Wendy provided financial peer review services to the Town related to a request for a change in scope and size of the project.

Pointe at Hills Farm, Shrewsbury, 280-unit proposed 40B project. Wendy provided financial peer review services to the Town of Shrewsbury in relation to a request for a change in scope and size of the project and for mitigation payments for sewer upgrades.

Education

1995-1997	HARVARD UNIVERSITY KENNEDY SCHOOL OF GOVERNMENT Master of Public Policy, Concentration in Housing and Community Development National Conference of State Legislators Women's Network Scholarship Recipient	Cambridge, MA
1992	OBERLIN COLLEGE: B.A., Double Major in Economics and Women's Studies	Oberlin, OH

Experience

<i>President</i> June 2014- Present	NEW SEASONS DEVELOPMENT Housing development consultant and developer of affordable, mixed income and market rate housing.	Hudson, MA
<i>Director, Low Income Housing Tax Credit Programs</i> September 2008- May 2014	COMMONWEALTH OF MASSACHUSETTS, DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT Managed federal Low Income Housing Tax Credit Program with annual allocation of approximately \$15 million and Massachusetts Low Income Housing Tax Credit Program with annual allocation of \$20 million. Supervised four staff members. Managed allocation and disbursement of Tax Credit Assistance and Exchange program funding of \$170 million to 32 formerly stalled tax credit projects. Oversaw monitoring, compliance and asset management of LIHTC properties.	Boston, MA
<i>Director of Housing Development</i> May 2007-Aug. 2008	ALLSTON BRIGHTON COMMUNITY DEVELOPMENT CORP. Managed housing development department of three people in the construction and redevelopment of properties as affordable rental and homeownership housing. Oversaw the asset and property management of 500 units in nine developments.	Brighton, MA
<i>Deputy Director of Lending</i> Dec. 1998- May 2007	MASSACHUSETTS HOUSING PARTNERSHIP FUND Responsible for the origination, structuring, and approval of loans for two loan officers on the lending team to exceed \$60 million annual lending volume goal. In addition, responsible for designing and implementing with Director of Lending the team's marketing plan. Individually produced loan volume of \$16 million in last year. Worked with for-profit and non-profit developers with plans ranging from minimal to gut rehab and new construction of affordable apartments, involving multiple lenders and investors. Issued site eligibility letters for Chapter 40B developments. Designed/implemented subsidy programs to finance preservation of affordable housing, new construction of mixed income rental housing inside and outside of Boston, and production of housing for extremely low income families.	Boston, MA
<i>Project Manager</i> 1997-1998	CASCAP, INC. Managed initiative responding to rising need for affordable rental housing by low and moderate income individuals due to end of rent control. Obtained Cambridge city funding. Established objectives and criteria for properties to be developed. Negotiated control of three properties with 35 units under development. Raised \$2 million of city, state, private financing and rental subsidy contracts. Managed zoning and financing applications and approval. Hired consultants. Managed design, bidding and rehabilitation. Managed development budget and schedule.	Cambridge, MA
<i>Project Manager</i> 1996-1997	SOMERVILLE COMMUNITY CORPORATION Successfully applied for line of credit to finance the rehabilitation of one to four family homes for sale to first-time homebuyers. Identified potential properties for rehabilitation. Conducted feasibility analyses. Determined homebuyer eligibility.	Somerville, MA

<i>Intern</i> Summer 1996	NEWTON PLANNING & DEVELOPMENT DEPARTMENT Managed approval of CDBG funding for 8-unit group home for use by adults with developmental disabilities. Developed underwriting guidelines for allocation of CDBG and HOME funds. Researched inclusionary zoning laws and suggested revisions to zoning ordinance. Wrote RFPs for architectural services and new construction of affordable homes on land owned by city and housing authority.	Newton, MA
<i>Assistant Loan Officer</i> 1992-1995	MASSACHUSETTS HOUSING PARTNERSHIP FUND Financed rental housing. Managed bridge financing for tax credit projects. Implemented MIS for lending programs. Designed homeownership program database. Evaluated applications from banks for affordable housing credit.	Boston, MA

Selected Panels, Workshops, Seminars & Memberships

January 2014	National Council of Housing Finance Agencies, Panel Discussion Leader Topics: Cost Containment, Fair Housing, Year 15 Disposition and others	Washington, DC
December 2013	KPM Housing Symposium Panel Participant: "What Keeps You Up at Night?" Topics: Year 15 Disposition, RAD, Funding Availability for Affordable Housing	Boston, MA
June 2013	NCSHA Housing Credit Connect Panel Discussion Leader: Dialogue with Developers , Topics: QAP Trends, Mixed Use Financing, RAD, Cost Containment	San Francisco, CA
November 2011	National Housing and Rehab Association, State Credit Allocators Roundtable	Boston, MA
June 2011	MHP Housing Institute, Funders Roundtable	Boston, MA
October 2009	KPM Housing Symposium, Panel Participant: "Key Perspectives for an Industry in Transition Topics: TCAP, Section 1602 (TC-X) Programs	Devens, MA
Through Aug. 2009	New England Women in Real Estate, Member	Boston, MA
2008	FHLB Affordable Housing Rental Competition Presenter & Host Developer Presentation Topic: Sources of Affordable Housing Financing in Massachusetts	Boston, MA
2006-7	Greater Boston Real Estate Board Rental Housing Association, Member	Boston, MA
2006-7	Local Initiative Support Corporation Housing Committee, Member	Boston, MA
2006-7	CHAPA Section 8 Housing Committee Re: Section 8 Policy Reform, Member	Boston, MA
March 2007	Boston University Positive Assertive Management Training	Tyngsboro, MA
2004	New England Women in Real Estate , Recipient of 2004 Networking Award	Boston, MA
April 1999	Mass. Bankers Association Personal Financial Statement Analysis Workshop	Needham, MA
Mar-Apr 1999	Toastmasters Speaking for Success Adult Education Class	Marlboro, MA
March 1999	IPED "Revitalizing the HUD Inventory" Conference Re: Expiring Use Properties	Boston, MA
Summer 1998	The Community Builders Relocation and Mod Rehab Workshop	Boston, MA
Spring 1997	LISC Asset and Property Management Workshop	Pawtucket, RI
Summer 1994	Harvard University Institute for Affordable Housing	Cambridge, MA
Spring 1994	New England Banking Institute Financial Analysis Seminar	Boston, MA
Spring 1994	New England Women In Real Estate Negotiations Seminar	Boston, MA
Summer 1993	Tufts University Management and Community Development Institute	Medford, MA

Selected Volunteer Contributions

<i>Advisory Board</i> Member 2007-2008	HABITAT FOR HUMANITY NORTH CENTRAL MASSACHUSETTS Co-Chair of Hudson Local Partner Committee. Former Member of North Central Mass. Affiliate Advisory Board. Previous Chair of Site Selection Committee.	Fitchburg, MA Hudson, MA
<i>Board Member</i> 2000-2001		
<i>Board Member</i> 2003-2006	UNITARIAN CHURCH OF MARLBOROUGH AND HUDSON Former Teacher and Member of Executive Board.	Hudson, MA
<i>Clerk</i> 2004-2006		
<i>Treasurer,</i> <i>Finance Committee</i> 1991-92	OBERLIN STUDENT COOPERATIVE ASSOCIATION Managed \$32,000 budget as treasurer of one cooperative. Represented individual cooperative as member of Finance Committee of umbrella organization (OSCA).	Oberlin, OH

Summary

Highly motivated, analytical and responsible manager with varied experience in real estate development, affordable housing, public policy and marketing. Proven track record of completing complex management projects, leading and collaborating with diverse members of a team and successfully carrying out project goals.

Highlights

- Project Management
- Affordable Housing
- Proposal Writing
- Policy Development
- Report Preparation
- Marketing

Experience

New Seasons Development, LLC, Hudson, MA

March 2017 - Present

Consultant

Provide proposal writing services, project feasibility analysis, and office operational support services to President for the development of affordable and mixed-income housing.

- Prepare state and local applications for funding, including proposal writing and project budgeting.
- Assist in analysis of project feasibility for affordable housing projects ranging from \$10M to \$45M.
- Review contracts for services; prepare project requisitions; and complete regulatory documentation for the development of affordable housing.
- Provide operational and business development support, including WBE certification, invoicing and marketing.

CDW Consultants, Inc., Framingham, MA

June 2013 - Present

Assistant Project Manager

Assist Associate Principal/Finance Director in developing policies, managing project budgets and proposals, and managing portfolio of existing and prospective projects.

- Prepare proposals to public and private clients.
- Analyse and prepare reports for project budgets ranging from \$2,500 to \$800,000
- Create marketing collateral to support business development.
- Oversaw community engagement and regulatory filings for \$200,000 U.S. EPA-funded Brownfields site.

Mechanics Guild, Natick, MA

Sept. 2010 – Sept. 2012

Consultant

Managed various aspects of real estate development for commercial and residential properties.

- Worked with property manager on the marketing and lease-up of a 25-unit affordable housing development.
- Created development budgets for prospective projects.
- Coordinated with town officials and community leaders regarding existing and potential projects.

Chelsea Neighborhood Developers, Chelsea, MA

Jan. 2007 – Oct. 2009

Senior Project Manager, Asset Manager

Managed affordable housing development projects and neighborhood stabilization initiatives.

- Created an initiative to purchase distressed properties to stabilize community and build affordable housing.
- Coordinated acquisition, construction and permanent loan closings with funders, lenders and legal counsel.
- Prepared reports required by funders, investors and internal management.
- Oversaw the marketing of 16 new affordable ownership and over 100 rental housing units.
- Established benchmarks for property manager and guided their management of a 204-unit portfolio.

Planning Office for Urban Affairs, Inc., Boston, MA

Jan. 2004 – Jan. 2007

Development Officer

Managed mixed-income housing development projects and office operations, systems and procedures.

- Managed the community review process and permitting for affordable housing developments.
- Prepared applications for public funding to support low and moderate-income housing.
- Selected and coordinate the development team, including architect, contractor, civil engineer, landscape architect, and other consultants in association with the development of affordable housing developments.

Boston Redevelopment Authority (BRA), Boston, MA

Deputy Director, Community Development and Housing

Nov. 2000 – Dec. 2004

Managed a staff of 10 people to carry out the BRA's goal to promote community development and housing.

- Led team in the design and development review of residential projects of all sizes and complexities.
- Developed, wrote and implemented affordable housing policies.
- Negotiated affordable housing agreements and community benefits packages.
- Collaborated with City of Boston housing and economic development agencies to successfully plan for and promote housing development and implement Mayor Thomas M. Menino's successful *Leading The Way* strategy.

Senior Project Manager, Commercial Department

March 1999 – Nov. 2000

Managed and coordinated the regulatory review of large, complex commercial projects.

- Conducted and coordinated feasibility studies including conformity with zoning requirements, traffic studies, environmental impacts, land use and project costs.
- Facilitated community participation; negotiated project mitigation measures.
- Assisted in the development of neighborhood master plans.

Project Manager, Director's Office

Oct. 1997 – March 1999

Managed and coordinated the design and development of medium and large development projects. Participated in community meetings and neighborhood planning initiatives.

Other Experience

Natick Soccer Club, Natick, MA

July 2017 – Present

Board Member, Clerk

Natick Housing Authority, Natick, MA

February 2013 – Present

Board of Commissioners, Vice Chairman

Bicycle and Pedestrian Advisory Committee, Natick, MA

July 2011 – December 2015

Education

MA, Spanish and Latin American Studies, The American University, Washington, DC

BA, American Studies, Fordham University, Bronx, NY

Study Abroad, University of Salamanca, Salamanca Spain

Proficient in verbal and written Spanish.



Anser Advisory

HOUSING

Anser provides advisory, funding and management services to various housing types throughout the U.S. We have worked on over 6,000 units of affordable housing with every source of financing available to state and local developers.

Our projects include low and very low-income housing, shelter housing, supportive veterans housing, workforce housing, senior housing facilities, domestic violence housing and group homes. Anser's team of experts can provide a wide range of services to help you with your housing needs.

Program Management

The balance between what is needed and what is affordable is paramount in any project. We develop programs that help you plan, build, and operate the entire portfolio. We develop financial feasibility studies and capital needs assessments, logistics and phasing plans, site and building assessments, HUD obsolescence studies and community engagement strategies.

Project Management

Once the project need is determined, we manage the process from concept to closeout. We help guide the preconstruction and programming, assemble the design and engineering teams, oversee the design, manage the contractor procurement process and drive the construction process.

ANSERADVISORY.COM

Anser Advisory

HOUSING SOLUTIONS

Anser is qualified to provide a wide range of management consulting services that address every phase of the housing development process, including financing, programing, project and construction management. Whether it is securing financing, developing a program, or managing the design and construction, we have a solution for you.

We have the technical expertise and execution capabilities to provide tailored solutions and staff augmentation capabilities to support our clients changing needs. **We pride ourselves on providing the right people at the right time.**

Project/Program Management

Anser has worked with many housing authorities and community organizations to complete major projects ranging in cost from \$100,000 to \$55,000,000. Each project brings a unique set of challenges that we are able to meet head on by bringing an understanding of tight budgets, schedule constraints, and complex financing.



WHITTLESEY VILLAGE
12 NEW DUPLEX UNITS
MODULAR CONSTRUCTION
LEED GOLD



CASTLE SQUARE
500 UNIT RENOVATION
DEEP ENERGY RETROFIT
LEED PLATINUM

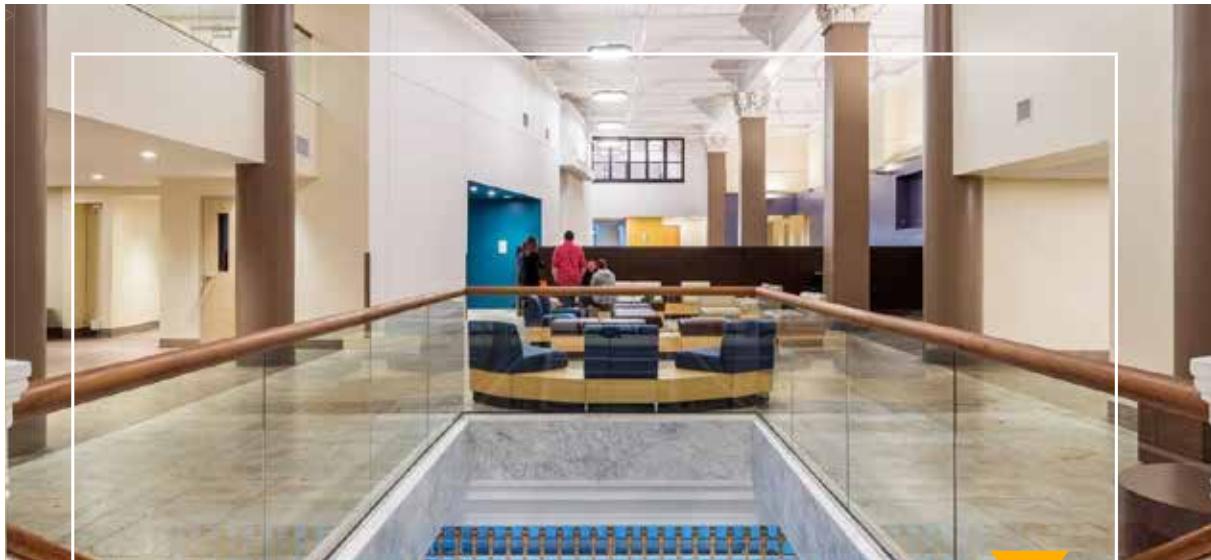


GOLDA MEIR HOUSE
200 UNIT RENOVATION
ELDERLY HOUSING
16% ACCESSIBLE UNITS

Anser will serve as your trusted advisor through every step of the affordable housing development process, from project concept through closeout.



HOUSING



Development Consulting

Identifying financial resources and coordinating funding streams are critical to a project's success. Anser provides real estate development consulting services to lead nonprofits, social service agencies, municipalities and institutions through complex housing development projects. Whether it's a new multi-family housing project or a mixed-use historic renovation, our focus is to obtain the appropriate financial package that will launch and sustain our clients' projects through completion.

By offering development consulting services, we integrate a project's planning, design, and construction phases with the right financing resources. Our development consulting team has secured financing for a diverse range of projects throughout the country.

Securing Financing

Securing financing for affordable housing projects can be a daunting task. Anser can help your organization identify, secure and manage a number of financing sources including:

- Low-Income Housing Tax Credits (federal and state)
- Tax Exempt Bonds
- Public Subsidies
- Grants and Rebates
- Historic Tax Credits (federal and state)
- Brownfields Remediation funds
- Public Subsidies (municipal, state and federal)
- Conventional Financing

NEW ENGLAND
CENTER AND HOME
FOR VETERANS

\$24M MULTI-PHASED
RENOVATION

FULLY OCCUPIED
DURING CONSTRUCTION

LOW INCOME HOUSING
TAX CREDITS

FEDERAL AND STATE
HISTORIC TAX CREDITS



HOUSING



MYSTIC WATER WORKS APARTMENTS SOMERVILLE, MA

Anser was owner's project manager for the Somerville Housing Authority and the rehabilitation of the historic and long-vacant former Water Works building. With a growing demand for housing, the City of Somerville decided to incorporate this notable yet dilapidated structure to reinvigorate a central entrance into the City. The project created 25 one-bedroom units for seniors and persons with disabilities, including five units reserved for persons earning less than 30% of the area median income. All 25 units were built within a single 24,000 SF two-story building, which included common areas and other facilities. Special attention was paid not only to historic features but sustainable elements in order to minimize the long-term energy expenses for the building.

This historic Mystic Pump Station building was constructed in three sections, which were respectively completed in 1864, 1870, and 1895. Anser coordinated the successful application for both federal and state Historic Tax Credits, reducing project costs and preserving a highly visible building which is a local landmark. Construction was delivered via 149a Construction Manager at Risk. The project was also awarded the 2018 Somerville Preservation Award.

CLIENT

Somerville Housing Authority

CONSTRUCTION COST

\$10.1 Million

PROJECT DURATION

2016 - 2018





86 DUMMER STREET APARTMENTS BROOKLINE, MA

Owner's project manager for the construction of 32 new wood-frame apartments, plus below building parking at grade, and courtyard renovation at 86 Dummer Street in Brookline. The project includes green elements, such as energy-efficient window gas-fired heat and hot water, Energy Star appliances, native landscaping and low-emission paints and materials. The new layout features an accessible courtyard that includes landscaped green space, play structures and a basketball court. The new housing development features spacious one, two and three-bedroom units for low-income families, senior citizens and people with disabilities.

Despite poor conditions that included record-breaking snowfall of greater than 110" in 2015, construction continued throughout the winter. construction of the project started in August of 2014 and was completed in November of 2015.

Value Engineering Analysis. During preconstruction Anser's value engineering analysis resulted in an adjustment of the concept and the structural system to reduce cost. The ground floor covered parking for the project was driving the structural grid and resulting in unit sizes which were larger than desired and more costly than the budget allowed. We identified the issue, recommended options, and calculated cost impacts. Based on our analysis, the architect revised the entire concept of the garage, the building was narrowed, the structural members were reduced in size, and the units became smaller – reducing the volume of the building by 15%, which resulted in significant savings.

CLIENT

Brookline Housing Authority

CONSTRUCTION COST

\$12.6 Million

PROJECT DURATION

2013 - 2015



SECTION 1 FIRM QUALIFICATIONS & EXPERIENCE

CHOICE CENTER AT NORTH VILLAGE - CHELMSFORD HOUSING AUTHORITY CHELMSFORD, MA



CONSTRUCTION \$: \$4.5M COMPLETE: 2012

The CHOICE Center is the new construction of a final building for the existing 102-unit Chelmsford Senior Campus, called the North Village. The 35,000 SF facility includes 37 age-restricted units and 4,000 sf of common area for a café and other supportive services that are available to the entire campus. Anser provided owner's project management services; we assisted with various Chapter 30b procurements, engaged maintenance and on-call professional services, and developed best practices and timelines for handling the complex procurement process.

CHOICE (Chelmsford Housing Opportunities for Intergenerational and Community Endeavors, Inc.) is a non-profit affiliate of the Chelmsford Housing Authority.

WHITTLESEY VILLAGE APARTMENTS, ACTON HOUSING AUTHORITY ACTON, MA



CONSTRUCTION \$: \$2.8M COMPLETE: 2013

Anser led the two-step contractor selection process under Chapter 30 regulations and managed the construction of 12 duplex units of affordable housing in Acton built using modular construction. Design recommendations by the team coupled with modular construction methods minimized waste through material efficiency and the project was able to achieve a LEED Gold Certification. Site work began in September 2012 and was completed on schedule in 9 months at the end of November 2013.

Summary of Housing Experience										Client	
	\$ value	# of units	New	Modular	Occupied	Reno	Historic	Senior	Veteran	Year complete	Public
86 Dummer Street	\$12,600,000	32	v			v				2015	v
Alternative House	\$2,217,867	8				v				2021	
Brighton Aiston Apartments	\$2,476,000	60			v					2014	v
35 Hanborough Affordable Housing	\$4,258,887	12	v							2019	Allston Brighton CDC
Brownstone Apartments	\$3,477,000	75	v		v					2012	Brookview House
Burbank Street Housing	\$1,522,000	36								2013	Low Cost Tenants Association
Cabot Housing	\$10,761,000	67			v					2022	Fenway CDC
Cabot Street Homes	\$4,200,000	32	v							2011	YMCA of the NorthShore
Call Carolina	\$2,800,000	8	v							2021	YMCA North Shore
Cambridge Housing Authority - Jackson Gardens	\$11,000,000	45			v					2011	JPNDC
Cambridge Housing Authority - Lincoln Way	\$26,500,000	70	v							2013	Cambridge Housing Authority
Castle Square Apartments	\$50,000,000	500		v		v				2012	Castle Square Tenants Organization
Charlame Park Homes	\$1,200,000	92		v		v				2011	Charlame Park Homes
Chinatown Tremont Village Apartments	\$2,800,000	20		v		v				2015	Asian Community Development Corporation
Commonwealth Glenville Apartments	\$15,544,000	117		v		v				2016	Allston Brighton CDC
Congress St Residence	\$13,025,000	66		v		v				2017	MSCDC
Eagle Street Homes	\$2,000,000	17	v			v				2012	
Father Bills & Mainspring / Montello II	\$3,231,736	23	v			v				2018	Father Bills & Mainspring
Father Bills & Mainspring / Randolph Veterans	\$1,796,255	10	v			v				2020	Father Bills & Mainspring
Father Bills & Mainspring / Rodeway HRC	\$2,690,000	69		v		v				2021	Father Bills & Mainspring
Father Bills & Mainspring / Quincy HRC	\$7,600,000	30	v			v				2023	Father Bills & Mainspring
Father Bills & Mainspring / Broad St Housing	\$7,600,000	30	v			v				2023	Father Bills & Mainspring
Father Bills & Mainspring / Manley St	\$4,917,300	32	v			v				2021	Father Bills & Mainspring
Franklin Highlands	\$24,000,000	270		v		v				2019	Maloney Properties
Gateway Apartments	\$29,258,900	71	v			v				2017	HUB Holdings LLC
Glen Brook Way Ph 1	\$15,620,000	48	v			v				2021	Metro West Collaborative Development
Glen Brook Way Ph 2	\$14,311,000	44	v			v				2023	Metro West Collaborative Development
Golda Meir House	\$34,995,000	200		v		v				2018	2Life Communities
Hammond Organ Reed Apartments	\$7,000,000	46		v		v				2008	Worcester Common Ground
Harborlight House	\$3,085,000	30		v		v				2016	
Haywood House	\$26,190,000	54	v			v				2023	
Heritage Apartments	\$9,200,000	176		v		v				2013	Newton Housing Authority
Holcroft Housing	\$7,600,000	58	v			v				2013	North Shore CDC/YMCA, Phase I and II
Imani House	\$1,800,000	9		v		v				2009	
Island Parkside I	\$18,000,000	41								2022	Lawrence Community works
Island Parkside II	\$18,000,000	39								2023	Lawrence Community works
Lafayette Homes	\$1,000,000	16	v			v				2016	Northshore CDC
Levland Street Housing	\$20,000,000	43	v			v				2022	
McCarthy Village	\$1,000,000	27	v			v				2013	Action Housing Authority
Monachusetts Veteran Outreach Center (MVOC)	\$20,000,000	44		v		v				2023	
Mystic Water Works Phase I	\$10,100,000	25		v		v				2017	Somerville Housing Authority
Mystic Water Works Phase II	\$10,000,000	21	v			v				2022	Somerville Housing Authority
NE Center & Home for Vets	\$38,734,000	35		v		v				2017	New England Center and Home for Veterans
Neponset Field Housing	\$7,350,000	31	v			v				2011	ETC Development Corporation
Oak Terrace Apartments	\$9,000,000	88		v		v				2018	
O'Connor Mission House	\$1,750,000	9								2016	
Pitts Portfolio	\$38,000,000	201		v		v				2021	JPNDC
Powder House Village	\$9,550,000	48	v			v				2011	YMCA North Shore
Riviera Building	\$15,604,000	75		v		v				2021	
Salem Point Housing	\$6,400,000	77		v		v				2015	
Sharon Ridge Apartments	\$4,149,105	20	v							2013	Sharon Housing Authority
St. Joseph's Community	\$7,000,000	13		v		v				2017	
Talbot Commons Phase 1	\$10,889,000	38		v		v				2021	Codman Square Neighborhood Development Corp.
Union Hill Housing	\$2,230,000	24	v			v				2019	Maloney Properties Inc
Victory Gardens Apartments	\$23,000,000	74	v			v				2013	Woman's Institute for Housing and Economic Development
Walden House	\$3,600,000	7		v		v				2013	JPNDC
Wadebridge House	\$3,700,000	22		v		v				2013	North Shore YMCA
Welanddo Homes Phase 1	\$33,500	59		v		v				2019	Codman Square Neighborhood Development Corp.
Welanddo Homes Phase 2	\$10,000,000	59		v		v				2022	Codman Square Neighborhood Development Corp.
Weston Affordable Housing	\$2,000,000	7		v		v				2016	Weston Housing Authority
Whittlessey Village Apartments	\$2,800,000	12	v			v				2013	Action Housing Authority
YWCA - Worcester	\$25,834,000	42		v		v				2020	YWCA of Central Mass



TOM O'NEIL, CSL, LEED AP, MCPPO MANAGING DIRECTOR

Mr. O'Neil is a skilled project manager with 36 years of experience in the construction industry. He has experience across numerous sectors including academic, both private and public, housing and government, each requiring special considerations with multiple stakeholders. Mr. O'Neil has extensive knowledge of pre-construction planning, contracts, procurement, project execution, financial management, and project closeout. He is particularly experienced with occupied renovation projects with many phases, conceptual estimating, master planning and pre-construction practice.

SELECT PROJECT EXPERIENCE

Haywood House Apartments, Newton MA

Project Director for the construction of 54 units of Senior Housing for the Newton Housing Authority. The project is situated in a congested residential neighborhood adjacent to the JFK A affordable apartment complex. The preconstruction effort consisted of design and construction team procurement, design oversite, budget management and funding approval. This new 4 story wood frame project will break ground for construction in April of 2021.

Mystic Water Works Apartments, Somerville, MA

Project Director for the Somerville Housing Authority and the \$10M rehabilitation of the historical and long-vacant former Water Works building. The project created 25 one-bedroom units for seniors and persons with disabilities, including five low income units, within a single two-story building and included common areas and facilities.

Castle Square, Boston, MA

Project Director for the \$46M extensive occupied renovation of this 500-unit affordable housing complex. The project included a Deep Energy Retrofit, major system replacements including building envelope (roofs, walls, & windows); HVAC upgrades; solar hot water; and renovating bathrooms and replacing kitchens in all units.

Planning and coordination on this large scale and tight schedule, in such a busy downtown environment, had never been attempted. The project received LEED Platinum certification.

New England Center and Home for Veterans, Boston, MA

Project Director for the \$23.7M multi-phased reconfiguration, improvement and repair of space within this occupied housing facility in downtown Boston to enhance and expand NECHV's services and create more permanent supportive housing. The project consolidated program/service space, offices, and building support space on the lower floors to be more accessible from the street. A 4,800 SF extension of the Mezzanine level increased the total occupied area within the building. This more effective use of the existing building created room for 35 additional efficiency apartments as well as a separate space for Women Veterans' permanent housing.

86 Dummer Street Apartments, Brookline MA

Project Director for the \$12.6M construction of 32 new wood-frame apartments for the Brookline Housing Authority, plus below building parking at grade, and courtyard renovation. 86 Dummer Street was the largest new construction of affordable housing in Brookline in over 35 years. In addition to creating greatly needed affordable housing, the project involved rebuilding the entire courtyard area between the new building and Trustman Apartments affordable housing, with which it forms the fourth 'wall' of a quadrangle.

Neponset Field Senior Housing, Dorchester MA

Project Director for new construction of 31 units of HUD 202 affordable rental housing for independent seniors along the Neponset River. The project included extensive site infrastructure work including the construction of new roadways and utilities to the site to serve current and future phases of the project. The project was built to LEED Silver standards.

Commonwealth-Glenville Apartments, Allston, Brighton, MA

Project Director for the \$15M renovation of two multi-family affordable housing developments owned by Allston-Brighton CDC. This rehabilitation project included extensive masonry repairs and installing a complete sprinkler system throughout all 17 buildings, new entry and vestibule storefront systems. Site work included the complete repaving of the shared alley way and work to reset drains and repair concrete walkways.



JENNIFER WEISS DONOVAN, AIA, CSL, LEED AP, MCPPO SENIOR PROJECT MANAGER

Ms. Donovan has over 25 years' experience both as an architect and as a project manager with an electrical construction background, giving her a unique perspective on the construction process. She specializes in contract development and is particularly adept at authoring and negotiating agreements with owners and subconsultants. In addition to being a Registered Architect, Ms. Donovan is a Licensed Construction Supervisor. She has earned several honors, has given multiple presentations in the design and construction industry, and is an active community volunteer.

SELECT PROJECT EXPERIENCE

Glen Brook Way for Metro West Collaborative Development, Medway MA

Project Manager for this 2-phase, 92-unit family and senior affordable housing complex in six unique buildings. Spread over three land parcels, the \$15.5M Phase I segment consists of 48 units in four buildings, designed to be highly energy efficient. Phase II, budgeted at \$14.3M, consists of 44 units of senior housing, flanking each side of the Phase I development; this phase of all senior units is projected to achieve "net-Zero" energy consumption.

Father Bill's & Mainspring, Housing Resource Center and Broad Street Housing, Quincy, MA

Owners Project Manager working with the development team, designer and construction manager on this \$15M, 2-phase project in Quincy, directly adjacent to the existing Father Bills Homeless Shelter. The Housing Resource Center (HRC) will provide shelter dorms, kitchen/dining room, clinic, staff offices, support spaces, and outdoor gathering spaces. The subsequent Broad Street Housing (BSH) building will be connected to HRC, provide 30 SRO units (kitchenette, private bathroom, living area) plus meeting rooms, laundry and library space. A challenge for 2023 completion is managing the 36,000 sf construction on a tight, sloped site around an occupied temporary homeless shelter, adjacent to the active City public safety headquarters project.

Father Bill's & Mainspring, Rodeway Motel Conversion, Brockton, MA

Project Manager assisting design, construction, development team on acquisition and rehab of former Rodeway Motel for conversion into 69 Single Resident Occupancy units. Phase 1 is focused on housing while a later Phase 2 will include exterior and common space upgrades.

Father Bill's & Mainspring, Capital Projects, Brockton and South Shore, MA

Support FBMS staff as Project Manager on multiple developments for homeless individuals, families and Veterans. Projects have included historic restoration, interior renovations, exterior upgrades, contractor procurement, capital budget development, assistance with property assessments and appraisals, as well as assistance with FBMS Maintenance Department tasks.

Father Bill's & Mainspring, Montello Welcome Home II, Brockton, MA

OPM for the new wood-frame construction of this permanent housing development for the homeless. The apartment building has a gross area of 10,500 SF and will have 23 efficiency, Single Room Occupancy (SRO) apartments, each containing a kitchenette, private bathroom, and a living/sleeping area; additionally, there will be a small office for FBMS staff. This project is being built with sustainability and energy efficiency in mind with a goal of attaining an Energy Star II rating with a HERS Index (Home Energy Rating System) of equal to 65 or better. Completed 2018.

Education

Bachelors in Architecture,
Syracuse University School of
Architecture

Associate in Applied Science,
Interior/Architectural Design
Cazenovia College

Licenses/Certifications

Massachusetts Registered
Architect #30061

New York Registered Architect
#28662-01

Massachusetts Construction
Supervisor License
(Unrestricted)

LEED Accredited Professional
NCARB Certified Professional
Cal OES Safety Assessment
Program Evaluator

NFPA Hot Works Certificate

Organizations/Affiliations

Town of Weymouth Historical
Commission

National Association of Women
in Construction (NAWIC) – Past
President, Boston Chapter.

National Women in Roofing
(NWIR)

Professional Women In
Construction (PWC)

Experience

Years Experience: 25+

Years with Anser: 67

Father Bill's & Mainspring, Envision Home for Veterans, Randolph MA

Project Manager for \$3.18M new wood-frame construction Veteran housing in Randolph MA. The 2-story 5,100 SF building has 10 Single Room Occupancy (SRO) efficiencies, including kitchenette, private bathroom, and living/sleeping area. The complex includes staff office and conference space as well as a resident common space. Project completed 2020.

Bolivar Aquatic Complex, Town of Canton, Canton, MA

Project Manager for \$6M replacement of the Town of Canton's 45-year old pool and pool house building, utilized annually June-August as part of the recreation program. The pool itself is being replaced in similar footprint due to environmental constraints, pool house rebuilt to meet plumbing codes, and toddler pool being replaced with splashpad.

Brookview House III, Dorchester, MA

Project Manager for a \$4M ground-up wood-frame construction of a 3-story, 12-unit 22,300 SF apartment complex for homeless women with children. The project includes extra security features for residents, a child-care center and career training on the lower level.

American Antiquarian Society Goddard Daniels House | Worcester, MA

Project manager for historic restoration and electrical service upgrades including substantial coordination between owner, historical commission, and utility company. Challenges included specialized painting coordination and spray-on insulation application in fully occupied work environment, and replacement of significant historical features.

Waterford Place Apartments, Boston, MA

Project manager for renovations at Waterford Place, 26-unit affordable housing development. Scope involved coordination of roof, boiler and window replacements in a confined location.

Frawley-Delle Masonry Repairs | Boston, MA

Responsible for assessment, scope development, and coordination of repair work at three occupied brick apartment buildings in the City of Boston.



ETHAN BUTLER PROJECT MANAGER

Mr. Butler is a skilled project management professional with hands-on experience in the fields of architecture and construction. He has experience assisting with construction permitting, project administration and coordination, as well as conducting site visits to evaluate progress on the construction process and generate reports. He has also served as a site representative, preparing daily site reports on the construction site, while simultaneously monitoring all contractors and work being completed.

SELECT PROJECT EXPERIENCE

Lorenzo Pitts Portfolio, Roxbury and Dorchester, MA

Site Representative for the \$33M renovation to 220 apartments homes in five separate buildings ranging from one to six-bedroom units for the Jamaica Plain Development Corporation. The work included Mechanical and electrical upgrades, window replacement, structural repairs, and extensive interior renovations.

University of Massachusetts Boston, Clark Athletic Center & Elevator Upgrades, Boston, MA

Assistant Project Manager on two concurrent UMass Boston projects - the Clark Athletic Center Envelope Replacement project, including roof, metal panels, storefront and masonry replacement; and Elevator Upgrades, including replacement of 14 elevators in 5 campus buildings, installation of air conditioning in elevator machine rooms, and replacement of an emergency generator. The occupied construction required multiple electrical shutdowns, re-routing of pedestrian traffic along heavily traveled routes, and careful coordination on an active rapidly transforming campus.

American Antiquarian Society, Worcester, MA

Assistant Project Manager for the \$16M expansion and renovation of the American Antiquarian Society, a major research library housing the largest collection of printed material related to pre-20th century American history. The project included a new three-story wing, reconfiguration of spaces in the original building, and an upgrade of all mechanical systems, which involved complex sequencing and logistics to protect the library's historical materials.

Golda Meir House – 2Life Communities, Newton, MA

Site Representative for the \$32M occupied renovation and upgrade to a 199-unit senior affordable housing complex. The project included a complete redesign of the interior public spaces, renovations to the living units to increase the quantity of accessible units, exterior masonry repairs and new windows. The building was fully occupied, which required extremely close coordination with the residents and building management.

Pine Grove School Elementary School, Rowley, MA

Assistant Project Manager for the renovation of a 95,850 SF public elementary school. Renovations consist of upgrades and new MEP/FP systems, new windows, roofing, interior finishes, kitchen equipment, limited ADA upgrades to the site and replacing septic systems. The renovated MSBA-funded school will house 415 Pre-K through 6 students. Five phases of demolition and construction spanned 18 months while the school was fully occupied.

Underwood Pool, Belmont, MA

Assistant Project Manager for the Town of Belmont for the replacement of this 100+ year old outdoor public pool and bath house located in central Belmont. The plan included 2 adjacent pools and 2 bath houses set within a public park with an all-purpose field, playground and parking.

Wellington Elementary School, Belmont, MA

Assistant Project Manager, under a house doctor contract; managing the mitigation of interior noise issues that have existed since the opening of the 5-year old Wellington Elementary School.



RACHELLY BARTOLOTTA

PROJECT MANAGER

Rachelly is an effective project manager with years of experience in affordable housing development. She is skilled at collaborating with various partners and agencies, and working closely with coworkers and consultants for effective management. She has extensive knowledge of Federal Housing and Subsidy programs including the Low-Income Housing Tax Credit compliance and administration.

SELECT PROJECT EXPERIENCE

Opening Doors, Lowell, MA

Development Project Manager New construction of a 21-bed domestic violence shelter to serve women and children. The development of this facility is being funded by DHCD housing subsidy and will serve extremely low-income applicants (30% AMI).

Montachusett Veterans Outreach Center, Winchendon MA

Development Project Manager Historic Rehabilitation of two historic former school buildings and conversion to 40 units of affordable housing for U.S. armed forces veterans. Funding sources include Federal and State Historic Tax Credits, Low Income Housing Tax Credits and DHCD housing subsidy funds.

YWCA of Central Massachusetts Renovation, Worcester, MA

Development Project Manager for the occupied rehab of an 80,000 SF facility including childcare, housing and a fitness/wellness center. Funding sources include Federal and State Historic Tax Credits, City of Worcester HOME and CDBG funds, DHCD housing subsidy funds, New Market Tax Credits, Early Education funding, Federal Home Loan Bank grant funding and conventional bank financing.

PROFESSIONAL EXPERIENCE

Boston Housing Authority, Boston, MA

Project Manager, with responsibilities that included conducting and coordinating participatory planning for development initiatives among BHA and community residents, drafting Requests for Proposals for professional services and real estate development services, and performing real estate finance analysis. In addition, Rachelly coordinated the disposition of Agency real estate, prepared grants and funding applications to State and Federal agencies, and prepared requisitions and monitor spending and payments. She collaborated with regulatory agency staff to secure approvals, and coordinated and supervised the relocation and other resident services related to redevelopment projects

Merrimack Valley YMCA, Lawrence, MA

As Philanthropy Coordinator, Rachelly directly supported the Vice President of Philanthropy, prepared campaign and donor outreach materials and planned and organized special events. She produced impact narratives for annual appeals and tracked campaign progress metrics.

Lawrence CommunityWorks, Lawrence, MA

As Project Manager, Rachelly coordinated, planned and developed Real Estate projects Developed property acquisition strategies, secured project financing, and hired, managed and coordinated the work of various consultants. She created and managed project budgets and schedules, coordinated public process, permitting, zoning, bidding and contractor selection, identified and completed grant and funding applications for all project phases, including coordinating project closings.



FINANCIAL MANAGEMENT & ACCOUNTING

Our Accounting Department, under the direction of Mr. Oumar Diakite, Chief Financial Officer, is among the best in the industry. With nearly 20 years' experience, Mr. Diakite has extensive knowledge of the financial and accounting requirements of multi-family housing. With a team of highly skilled accounting professionals the firm is able to handle a wide range of accounting and financial needs for property owners.

The accounting software utilized by our firm is the web based Yardi Voyager. This state of the art software, with enhanced reporting capabilities, allows us to provide comprehensive accounting management to our property owners and immediate access to "real time" reports. We have the ability and the flexibility to custom design reports for our clients and property owners.

Our firm has extensive experience working with numerous regulatory agencies and has a comprehensive understanding of all reporting requirements of these agencies and lenders.

OPERATING BUDGET PREPARATION

The monthly financial report process begins with the budget process. Budgets are prepared by the Vice President/Regional Manager in conjunction with the Property Manager for the site and then reviewed by the Treasurer and Controller. The budget report includes last year's actual expenses, year-to-date and annualized expenses and the projected budget for the next fiscal year with a narrative explanation of the budget line items.

We submit a draft budget to the client 60 days in advance of the start of the fiscal year. The Vice President/Regional Manager meets with the Owner to review the budget and answer any questions.

Once approved by the client, the budget is then broken out into the twelve-monthly budgets, weighted for the seasons and timing of payments. Each month this budget is then compared to actual expenses.

DEPOSITS | RENT COLLECTION

The collection of rent is the responsibility of the on-site property manager. Each month the property manager is required to reconcile the rent collected compared to the gross potential and then submits to our accounting department by the last day of the month. The accounting department will reconcile the bank statements each month.

ACCOUNTS PAYABLE

Purchases are authorized by the Property Manager or Regional Manager depending upon the amount in accordance with the client approved operating budget. The Property Manager will review invoices received at the site office for accuracy and to ensure satisfaction with work completed and/or supplies received. If any adjustments are needed, the Property Manager will be responsible for contacting the vendor and arranging for an adjustment to be made to the invoice. The invoices are paid with checks cut at the Central Office.

The checks and invoices are reviewed again to ensure proper authorization and are signed by a member of the senior management team. Checks over \$5,000 are signed by a second senior member of the central office management team. The process is monitored by the Controller who is not authorized to sign on any of the bank accounts.

The Vice President/Regional Manager and the Controller work together with the client, to resolve any cash flow difficulties. The accounts payables process is closely monitored to ensure that bills are paid on a timely basis.



FINANCIAL REPORTS

The monthly financial reports are prepared by our accounting department, under the supervision of our Controller and Assistant Controller. The following is a listing of all reports generated monthly by the accounting department.

- Schedule of cash accounts;
- Schedule of all escrow accounts;
- Balance sheet;
- Accounts receivable summary;
- Detail and aged accounts receivable;
- Summary of accounts payable;
- Detail and aged accounts payable;
- Income and expense statement- actual to budget comparison; monthly basis; Year-to- date basis (the income and expense statements are produced on an accrual basis. This information is provided in summary and detail format).
- Check registers;
- General ledger reports;

Once completed, the reports are reviewed and analyzed by the Controller, and Regional Manager. A narrative explaining major variances is prepared and accompanies the report to the client.

AUDITING

An independent outside CPA firm audits all properties in our portfolio. The audits are completed in accordance with applicable regulations, most commonly Government Auditing Standards and Generally Accepted Accounting Standards. The accounting department prepares work papers in preparation of interim audits, year-end audits and tax returns. We work closely with the many CPA firms that audit the properties that we manage and receive very high marks from these firms.

CAPITAL BUDGETING

The most important component in capital planning, budgeting and improvements is a comprehensive maintenance program that identifies capital needs. Working in concert with this approach is the need to complete regular capital needs assessments and incorporate those needs into a long-range financial planning.



FACILITIES MANAGEMENT

Maloney Properties delivers maintenance services to its properties through a clearly defined maintenance system. The Maloney Properties Operations Manual provides detailed instructions on all aspects of facilities' maintenance. Training is performed utilizing the Operations Manual at least once per year for existing employees and during orientation for new employees.

We utilize a web-based software program to track all work performed on the properties. Our Facilities Department has developed a customized maintenance program for each property we manage utilizing best practices and our maintenance manual throughout the program. The program also provides an effective method of accountability.

Routine maintenance requests from residents during the work week are responded to the same day they are called in and immediately whenever possible. Weekend requests unless it is an emergency are responded to on the Monday following the request. Following the initial response, if the work needs to be scheduled, we notify the resident immediately to let them know when the work will be complete with the date and time.

Routine maintenance also derives from weekly property inspections that are conducted by the Property Manager and Superintendent. Our staff is trained to look for deficiencies that may include trip hazards, safety issues, security concerns etc. This proactive approach reduces or eliminates emergency maintenance. The results of the inspection are documented, and a routine work order is generated in our software program and tracked for completion.

The Facilities Department reviews the work reports for all properties on a quarterly basis. This provides added oversight to ensure that the property needs are being met in the most efficient and effective manner. The work order system enables our managers to provide clients with accurate information about the maintenance of the property and its long-range needs. The system also provides valuable information for appropriate staffing levels and realistic budgets.

PREVENTIVE MAINTENANCE PROGRAM

Preventive maintenance work orders are scheduled throughout the month which levels out the workload enabling the staff to be responsive to the routine work order requests that are not so predictable such as resident requested work orders, turnover work orders, special projects, etc.

Whenever an apartment inspection is conducted the Resident is notified in advance to ensure the resident has ample time to prepare for the inspection. Unit inspections are conducted by the Property Manager and the Building Superintendent and both individuals are trained to look for and to evaluate safety systems and conditions within the unit.

Unit inspections are conducted annually to eliminate emergency and/or unplanned maintenance and to help minimize property losses. Unit preventive maintenance inspections generate a series of work orders that are incorporated into the regular flow of routine work orders as part of the overall maintenance delivery system. The foundation of an effective preventive maintenance program is regular, repeated, and documented comprehensive inspections.

This system provides a written record of each inspection and resulting repair that can be tracked through our computerized maintenance delivery system.



Examples of items addressed through the Preventive Maintenance program include proper window/ door and lock operation, proper smoke detection and carbon monoxide system operation, plumbing systems, check on the heating/air conditioning and changing of filters if necessary, appliance operation, etc.

ENERGY CONSERVATION & SUSTAINABILITY

Maloney Properties has always recognized the need for sites to maximize efficiencies in order to reduce operating expenses without compromising service to the residents. We believe that cost-efficiency begins with an efficient and trained staff and follow through on every aspect of the site management operations.

Site utility usage analysis is constantly helping us determine where energy is used, where savings opportunities exist and where changes at the site level have impacted consumption. We have dedicated ourselves to monitoring usage and comparing similarly constructed sites in order to establish a base-line per location and provide an incentive for reducing costs. Usage is broken down in ways that can be understood and compared, e.g., units per day, per month, per bedroom size and per square foot.

We have worked with multiple organizations and programs to bring rebates and grants to properties to make improvements in energy and water usage. Presently we work with New Ecology and LISC on their Mass Green Retrofit Program providing no cost auditing, design, and administration. We have initiated applications and received over 2 million dollars' worth of energy improvements encompassing electricity, water and gas thru the L.E.A.N program with National Grid just in the past 2 years alone.

Energy technologies are constantly changing and Maloney Properties, in response, stays abreast of innovative ideas and actively pursues energy saving opportunities. Among the strategies we use are:

- Replacing motors with variable frequency drives (typically circulators)
- Retrofitting lights (Sodium to Fluorescent / HID / T12 to T8)
- Replacing boilers and domestic water heaters for higher efficiency (including condensing boilers)
- Installing economizers (using outside air for pre-tempering intake air)
- Replacing and restoring windows
- Replacing roofs
- Conducting energy audits (with utility companies or engineers)
- Getting utility rebates (both prescriptive and custom)
- Converting from electric to gas for heat, hot water, commercial stoves and laundry equipment
- Co-generation
- Alternate energy sources – with installation of solar panels and exploration of wind power
- Documenting operation and controls so equipment performs to design criteria

We are committed to assuring that green practices are followed in the buildings we own and manage. We have a comprehensive green policy that requires our staff and contractors utilize green cleaning products, VOC free paints and adhesives, green materials in all replacements and recycling as much as possible when replacing equipment.

CAPITAL IMPROVEMENTS

All properties are managed with an eye toward improvements; this increases the value of the property and enhances the quality of life for the residents living in the development. Maloney endorses a very specific plan and procedures for assessing the capital needs of every property, planning for the replacement of capital items, and contracting work.

The Property Manager is responsible for recording and updating all unit and building assets. The data is stored in YARDI and analyzed for the physical/capital improvements for the property. This tool enables the Property Manager to conduct long-range planning for the property as a way to continue to protect the investments of the resident/owners and the permanent financing sources.



We also consult with experts to assist in developing Capital Needs planning under our direction. These experts include firms that perform capital needs studies, but may also include engineers, architects or specific field experts (energy studies, envelope studies, roofing studies, etc.). Our approach is dependent on the needs of our client, site conditions and available funding.





MARKETING AND LEASING

Maloney Properties begins the marketing program at each of its properties with a complete and thorough market analysis. With the information compiled, a comprehensive marketing plan is developed that outlines both short term and long-term plans to achieve maximum and sustainable rents and occupancy levels. Systems are put in place to ensure short turnaround times. Maloney implements all Marketing Programs to ensure that all applicants are treated fairly and consistently in its marketing initiatives and in accordance with the approved Affirmative Fair Housing and Marketing Plan for the property.

MARKETING ACTIVITIES

Exterior Signage

Maloney will oversee the design and placement of innovative and effective signage to ensure maximum exposure as needed.

Marketing Material and Brochures

We will oversee, create and design marketing materials and brochures that will capture prospective applicants.

Website Design

In order to promote the units and properties, both for general reputation purposes and for attracting interested applicants, it is necessary for people to find the property website and for the website to capture their attention. This is done through effective website design, marketing and search engine optimization, which includes:

1. Professional pictures of units and exteriors, floor plans, and community info.
2. Possible video highlighting units, buildings and the area.
3. Website visual appearance, layout and usability.

This can be completed as part of the Owner's website or with a link to the property website.

MANAGING PROPERTIES WITH SPECIAL POPULATIONS | PROGRAMS

Maloney approaches working with special resident populations from a holistic, resident centered perspective. We have found that the key to ensuring special populations are able to successfully maintain residency and policy compliance is an energetic and purposeful team effort between the Property Manager and the Resident Service Coordinator utilizing and coordinating with Social Service resources in the community.

RESIDENT SELECTION

One of the most important interactions at our sites is when a prospective applicant enters the office. This is where the resident selection cycle begins and provides us with the opportunity to leave this person with a long and lasting positive impression about the property and the community. Maloney Team Members receive extensive training on customer service and marketing and understand the importance of greeting all individuals in consistent, professional and welcoming manner. Training on resident selection and fair housing law is conducted annually with all employees and is designed to ensure that our team is always professional and knowledgeable about the property with emphasis on customer service and compliance. Maloney Properties, Inc. employs a diverse work force, many of whom are bi-lingual. We also contract for translation services which are available to assist our staff 24 hours a day 365 days per year to ensure that language is never a barrier.

QUALIFYING APPLICANTS

Maloney will review the Resident Selection Plan eligibility criteria with the prospective applicant, including income limits, program eligibility requirements and occupancy standards.

The Property Manager or designated marketing team member will schedule an appointment to meet with the applicant to review and sign all the necessary release forms to determine eligibility and suitability. Background screening includes credit, criminal and landlord references in order to ensure as best as possible that an applicant meets the eligibility criteria for the property. If the applicant is eligible, and meets all of the suitability criteria, we then schedule an interview to review and execute a lease agreement.

During the interview process the Property Manager, Resident Service Coordinator and the resident review the lease, policies and procedures and provide the resident with the "Resident Handbook" which includes important and useful information about the building. We also review the resident service programming that is available to all residents and where appropriate begin the process to develop a service plan that meet the applicant's needs.

If there are no units available at the time of application, the applicant will be placed on the waiting list until a unit is available. The waiting list is updated annually to ensure there is a sufficient applicant pool whenever a vacancy occurs.

Once an approved resident has seen the unit s/he will occupy we hold an orientation session for the incoming resident and her/his family. New residents are also briefed on the community in which they will reside, such as the location of stores, houses of worship, transportation, schools and other services in the surrounding communities. A Move-In Inspection Form is prepared, reviewed, and signed by both the resident and the Property Manager after they inspect the unit's condition.



RESIDENT SERVICES



Resident Group Day Trip to Hyannis



Tai Chi

Maloney Properties is a respected and recognized leader in the industry for its innovative and successful implementation of resident services in housing communities.

For more than 38 years, our firm has successfully designed, created, and implemented resident services programs that improve the quality of life in the communities we serve. Several of our properties have been recognized, regionally and nationally, for outstanding service in providing supportive housing programs. Maloney Properties' was commissioned by MassHousing to author the Massachusetts Resident Services Coordinator's Handbook in 2006. In 2014, we were again retained to update the Handbook.

Resident services professionals are a fundamental part of the Maloney management team – whether they are employees of Maloney Properties, of the Owner, or of other service agencies. We have worked successfully in each of these situations.

We currently have 25 Resident Service Coordinators working at Maloney Properties, as well as social work student interns during the academic year.

Philosophically, Maloney Properties approaches resident services from a holistic, resident centered perspective. We utilize the person-in environment model to determine how to best meet the needs of our residents. Specifically, we work to design and implement resident services to consider the multi-dimensional needs of the individual and larger community including the physical, cognitive, emotional, spiritual, and social realms. Individually, services are provided from both an education and prevention perspective, as well as through intervention and response. Resident Services are customized to serve the needs of the specific individuals, resident populations and the resident community within the context of the larger neighborhood.



Nylmarie Espinosa, Resident Service Coordinator
North Canal Apartments
Receives Resident Service Award for Excellence
NERSC Conference 2016

Put our experience to work for you.

Property highlights.



ROLLINS SQUARE

Boston, MA

Rollins Square is located in the South End neighborhood bordered by Washington Street, Harrison Avenue, Waltham and Savoy Streets. The development consists of 184 condominiums with a mix of income including market and affordable housing. Rollins Square also features 6,084 square feet of retail space and 275 underground private parking spaces.



332 MAIN | THE CENTRAL BUILDING

Worcester, MA

332 Main is a beautifully converted historic building centrally located in Worcester, MA. This mixed income property features 55 units of market rate, affordable and workforce housing. The property features modern, luxury amenities including a game room, fitness center, yoga studio, media room and more.

Maloney Properties was hired to oversee the marketing, leasing and management of 332 Main and has been providing full-service property management for this development since 2018.



FRANKLIN HIGHLANDS

Dorchester, MA

Maloney Properties and the Franklin Park Development Tenants' Association have managed this property in a unique partnership since 2002. Franklin Highlands is located in the Dorchester neighborhood of Boston and consists of 270 LIHTC family units. Franklin Highlands includes one, two, three- and four-bedroom units. Common area facilities include management and leasing offices, a storage and community activity space.

Various activity spaces throughout the property are used for a computer learning center, for community-based health care and a childcare program that is operated by members of the Tenants' Association. Franklin Highlands' residents are given priority access to these services.



MORVILLE HOUSE

Boston, MA

Morville House, located in the Fenway, has a 33-year history of providing resident service programs to seniors and people with disabilities. The property has 175 studio and one-bedroom apartments. While the demographics of the population have changed dramatically over this history, Morville House has always had an economically and culturally diverse population.

Resident service programs, under the guidance of a full-time RSC, are funded through an endowment of Episcopal City Mission. This allows for art classes, catered events throughout the year, an exercise and fitness program several days each week, a visiting nurse who spends an afternoon each week available to residents for questions and routine screenings, a full computer lab with weekly instruction in English and Russian, a weekend activities' coordinator, multicultural and educational activities, and transportation.

In the past two years, Maloney Properties helped the Owner refinance Morville House, netting Episcopal City Mission \$7 million for their endowment.



HOLYOKE FARMS

Holyoke, MA

Holyoke Farms is a 32 building, 229 unit mixed-income development in the City of Holyoke, MA. In the past year, the development underwent a significant rehabilitation including renovation of 217 two- and three- bedroom townhouse apartments. A new, three story building was also added to the development, which includes the addition of 12 fully accessible housing units, community space, a laundry room and a new management office.

Holyoke Farms consistently operates with minimal vacancy. The property offers basements in every unit, washer/dryer hookups, private rear patio space and free surface parking. The site is well positioned with downtown Holyoke just 2.5 miles from the site.

LEADERSHIP

Maloney Properties, Inc. is owned by five principals, Janet Frazier, Michael Frazier, Diana Kelly, Celeste Vezina and Kathy Luce all of whom have over thirty years of experience in the industry and play an active role in the company. The Managing Board of the firm includes two additional principals, Lynn Delidow and Mark Kelly who serve as regional managers and in some cases oversee other regional managers with less seniority in a role we describe as Principal-in-Charge to provide added oversight.



JANET FRAZIER, President | Chief Executive Officer

Ms. Frazier is the President/CEO of Maloney Properties, Inc. and a founding partner of the firm. Ms. Frazier oversees the operation of the Management Company as well as thousands of units of housing including rental housing developments, condominiums and cooperatively owned properties. Ms. Frazier has served first as Chief Operating Officer in 1981, and then as President/CEO since 2000.

Ms. Frazier is a licensed real estate broker and a member of the Institute of Real Estate Management and the Greater Boston Real Estate Board.

Ms. Frazier serves on the Boards of Directors for the Franklin Square House Foundation and the Metro Housing Boston.



LYNN M. DELIDOW, Vice President

Ms. Delidow is a VP and Regional Manager and currently oversees a portfolio including family and elderly housing totaling 927 units.

Ms. Delidow holds a Master's in Social Work from Boston University. She has a C5P designation for the management of properties that receive tax credits. Ms. Delidow serves on the Maloney Properties, Inc. Board of Directors and is a member of the Employee Training and Professional Development Committee.

serve diverse resident populations, with multiple subsidy layers, and varied ownership structures. She is a dynamic leader who successfully oversees management teams that consistently exceed our clients' expectations.



JASON TUCKER, Regional Manager

Mr. Tucker currently oversees a portfolio of family housing including Franklin Highlands, which is a partnership between the resident organization and Maloney Properties, Inc.

Mr. Tucker holds a Bachelor's Degree in Management from Curry College. He has a CP3 and SHCM designation for the management of properties with tax credits and is also a Certified Occupancy Specialist for the Section 8 Program. Mr. Tucker served as a Board Member for the Bellingham Housing Authority for 4 years and currently serves as a Board Member for the New England Affordable Housing Management Association (NEAHMA). He is also a member of the Maloney Properties Innovation Committee.



Mr. Tucker joined Maloney Properties, Inc. in 2002. Mr. Tucker has been overseeing operations of the Charlesbank Cooperative, a 276-unit high rise family property in Mission Hill, since 2007. In his time at Franklin Highlands and Charlesbank Cooperative he has worked closely with the properties' ownership entities to successfully complete millions of dollars in major capital improvement projects and ensures their respective properties received the highest level of professional management services from his management teams.



KATHY TYRRELL LUCE, Vice President

Ms. Luce is Vice President at Maloney Properties, Inc. Ms. Luce has been a member of the Maloney leadership team spanning 34 years since 1983. She oversees the management of a large portfolio of mixed income senior and family housing. Ms. Luce is widely respected for her work overseeing the management of complex and challenging properties.

In her leadership role as a Partner in the firm, Ms. Luce serves on the Board and acts as Principal-in-Charge and internal consultant to Regional Managers within our company overseeing portfolio operations including quality assurance, start-up support for new properties, training for resident and community Boards.



DIANA KELLY, Vice President

Ms. Kelly oversees a varied portfolio of both conventional and assisted rental housing managed by Maloney Properties, Inc. as Regional Manager/VP. Ms. Kelly also serves on the Maloney Properties, Inc. Board of Directors. She has solid experience in property management and has specialized in managing resident-controlled housing, particularly under the expiring use programs. Ms. Kelly designs and oversees complex relocation efforts at developments undergoing significant rehabilitation.

In addition to her responsibilities as a partner in the firm, Ms. Kelly serves as the Executive Director of For Our Communities - FOCUS, Inc. FOCUS is a non-profit corporation that is committed to the preservation of deteriorating buildings and neighborhoods by promoting the development and operation of affordable housing.



MICHAEL FRAZIER, Vice President of Facilities

Mr. Frazier directs the Facilities Management operation of Maloney Properties, Inc. and supervises the Construction and Maintenance Services Divisions. He serves on the Maloney Properties, Inc. Board of Directors and is Chairperson of the Sustainability Committee. With his staff, he plans and supervises capital improvements and coordinates maintenance for all properties managed by Maloney Properties, Inc.

Mr. Frazier is trained and experienced in several of the construction trades and is an expert in energy conservation and the use of alternative energy sources.



CELESTE VEZINA, Treasurer

Ms. Vezina is responsible for the fiscal affairs of the company and serves on the Maloney Properties, Inc. Board of Directors. Ms. Vezina provides financial advice to clients on a variety of cash management issues as those concerns relate to individual properties. Ms. Vezina also provides support to our regional managers in developing budgets for properties which are experiencing challenging financial issues.

Ms. Vezina is responsible for Maloney Properties' risk management and loss prevention program and administers the company's safety and health programs. Ms. Vezina oversees the Maloney Properties, Inc. Insurance Programs, which include property and liability insurance on the developments in the management portfolio, workers' compensation, health insurance and long-term disability. Ms. Vezina directs major bulk purchasing initiatives consulting with owners and regional managers on various cost reduction programs.



MARK KELLY, CPM, Vice President

Mr. Kelly is a Vice President and Regional Manager responsible for a large portfolio of market, mixed use and mixed income housing in Boston. He also has managed the turnaround of two large lodging facilities (a hotel and a hostel) which are currently included in his portfolio. Mr. Kelly serves on the Maloney Properties, Inc. Managing Board of Directors.

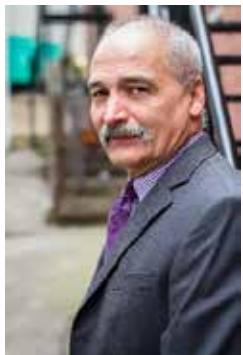
Mr. Kelly specializes in marketing large mixed-use properties and in repositioning poor performing properties. He is also an expert on security matters and has worked extensively on security and resident services programming designed to prevent violence in Boston. After working for Inc. Magazine and Fidelity Investments, Mr. Kelly began his career in Property Management in 1990 with a firm acquiring, renovating, marketing and managing condos and their associations. He is a licensed Real Estate Broker.



DEBBIE PILTCH, Vice President of Compliance

Ms. Piltch joined Maloney Properties in 2002 and is responsible to continually update and revise our in-house compliance operating manuals and training programs. She supervises the Compliance Department staff, who work closely with the state monitoring agencies during site audits and prepares all responses to the agencies.

Ms. Piltch is the Maloney Properties, Inc. "go to" person for all compliance matters. Ms. Piltch supervises the Section 504 Coordinator and is responsible to ensure that all requests for reasonable accommodations are handled appropriately. Ms. Piltch is a member of the Massachusetts Bar Association.



ERIK THELEN, Vice President

Mr. Thelen oversees a diverse portfolio of senior and family housing located in the Boston neighborhoods of Chinatown and East Boston, and in Lynn, Quincy, Danvers, Framingham and Haverhill. Mr. Thelen works directly with owners and clients coordinating and supervising refinancing and restructuring of various projects including extensive capital improvements. Mr. Thelen joined Maloney Properties in August 2003 with an extensive background in property management, including market rate, various state and federal subsidy programs, Low Income Housing Tax Credit, multi-site responsibilities, cooperative management, new construction, condominium management and rent ups.

Mr. Thelen has monitored and participated in the development of energy conservation and sustainable programs for Public Housing Authorities, housing communities, and commercial clients. Mr. Thelen is a Certified Occupancy Specialist with the National Center for Housing Management and has received a CP9 designation for Low Income Housing Tax Credits with Spectrum. Mr. Thelen is a graduate of Northeastern University with a degree in Business Administration and is a member of the Salem High School Electrical Advisory Committee.



JAMES REGIS, Vice President

Mr. Regis is involved in the oversight of conventional and mixed income housing under management, as well as the development of new rental housing.

Mr. Regis has worked in the area of multifamily housing management and development since 1986. Prior to joining Maloney, he was Senior Vice President for a Boston-based property management, development and consulting firm for over twenty years. Responsible for the oversight of a large portfolio of market rate and mixed-income units, Mr. Regis excelled in the marketing and lease-up of new product and the creative repositioning of older assets. Additionally, he was chief overseer for all new construction and moderate rehab projects, as well as consulting services provided by the firm.

Mr. Regis utilizes his in-depth knowledge of construction, management and maintenance techniques to accurately assess current needs and foresee future concerns. Mr. Regis is well versed in value-engineering solutions to large and difficult building problems. He is a trained landscape architect and has worked in the architecture and interior design disciplines.



AMY LAWTON, Regional Manager

Ms. Lawton has over 35 years' experience working in the property management industry and oversees a varied portfolio of mixed income properties including Market, Section 8, LIHTC, HOME and commercial property management.

Ms. Lawton works closely with clients to accurately assess the needs of each property. She has extensive knowledge and expertise in long-range planning for financial restructuring and capital improvements. Her supreme levels of efficiency and attention to detail make her an excellent leader in the oversight of complex property structures with multi layered subsidy programs.

Ms. Lawton is COS, BOS and C8P certified. Ms. Lawton is also a member of CREW Boston.



JIM GRENIER, Regional Manager

Mr. Grenier joined Maloney Properties in 2009 to oversee several complex scattered site developments in Cambridge. Mr. Grenier now oversees a large portfolio of affordable housing and commercial properties in Cambridge, Allston and Brighton and has an extensive background in real estate and construction management. He also has expertise in the management of various federal, state and municipal affordable housing programs. He has successfully developed and implemented several leading energy conservation and cost reduction programs and also specializes in distressed properties.

Mr. Grenier has a comprehensive understanding of conventional, mixed use and the affordable market place and has also worked with local officials to develop operational and safety policies and procedures.

Prior to joining Maloney Properties, Mr. Grenier worked for two large development and property management firms specializing in market rate developments, commercial properties and affordable housing.



OUMAR DIAKITE, Chief Financial Officer

Mr. Diakite directs the Accounting Department and oversees financial reporting. He supervises all accounting, payroll, and banking transactions. He works closely with regional managers and our clients to ensure the properties' fiscal goals are met. Mr. Diakite has an exceptional ability to customize reports to provide meaningful and easy to read financials. He receives high marks from regulatory agencies, property investors and audit firms for the quality and timeliness of his reporting.

Mr. Diakite joined Maloney Properties, Inc. in 2002 as the Assistant Controller to oversee a large portfolio that included properties with multiple financing programs and complicated ownership structures as well as market rate housing. He has considerable experience in a wide range of financing and subsidy programs including projects financed through HUD, MassHousing, MHP and the Low-Income Housing Tax Credit Program.

Mr. Diakite holds a Master's Degree in Business Administration from Suffolk University Graduate School of Management.



MICHELLE SPICER, Director of Human Resources

Ms. Spicer oversees the Human Resources Department at Maloney Properties, Inc. With over 20 years' of experience, she is responsible for various human resources functions including recruitment, staffing, training and development, performance monitoring and employee counseling.

Prior to joining the organization Ms. Spicer was a Human Resources Generalist at Pearson Education. She was also the Human Resources Manager for Mayo Group where she assisted in the growth and development of the real estate firm from a 25 to more than 200 employee organization spanning multiple states. Ms. Spicer also supervised the Human Resources function for 6 years at East Cambridge Savings Bank.

Ms. Spicer holds a Master's Degree in Human Resources Management from Emmanuel College and a Bachelor's Degree in Sociology from Suffolk University. She is a Member of the Society for Human Resources Management (SHRM) and the Northeast Human Resources Association (NEHRA).



JENNIFER KADILAK, Director of Resident Services

Ms. Kadilak joined Maloney Properties, Inc. in 2009 as the Director of Resident Services. Ms. Kadilak is responsible for various resident services functions including development and direction of services and programs, trainings and activities. Ms. Kadilak also participates in the resident interview process, resident programs, trainings, services, and activities, participating in the resident interview process, new resident orientation, recruitment and coordination of volunteers and interns, maintaining communications with residents including the distribution of newsletters and providing information and referrals to service agencies, supporting the resident council, and other such duties.

Ms. Kadilak is a licensed social worker and is a Certified Trainer in Non-Abusive Physical and Psychological Intervention (N.A.P.P.I.).



MATTHEW RODRIGUEZ, Director of IT

With over a decade of progressive responsibility in IT Director roles, Mr. Rodriguez has a proven track record for leading, engaging, and motivating teams. He has experience working as a management consultant, as a successful entrepreneur, and as an employee in a variety of technical roles.

Always focused on business results, Mr. Rodriguez transforms strategic objectives into measurable outcomes. He has selected/designed, deployed, and maintained many mission-critical systems for multi-national organizations in various industries including healthcare, education, manufacturing, and financial services.



SUSTAINABLE DESIGN



COMMITTED TO THE GREENING OF OUR COMMUNITIES



We are committed to understanding the true costs and benefits of green design, as well as studying the effectiveness of those measures. At the outset of projects, we perform green design charrettes as well as feasibility studies to identify and develop achievable sustainable design goals. Our firm has also completed post-construction testing, commissioning and post-occupancy energy performance studies on several of our projects, working in cooperation with engineers and green design consultants. The results have shown low initial costs for green design measures and a rapid payback in lower energy costs.

“ ...I go to nature every day for inspiration in the day's work. I follow in building the principles which nature has used in its domain. —Frank Lloyd Wright

CONTINUED GREEN SUCCESS

DAVIS SQUARE ARCHITECTS, INC.'s sustainable buildings have been honored for excellence in smart growth, sustainable design, revitalization of an urban brownfield site, green community, energy efficiency, and excellence in design. They have also achieved distinction for their high efficiency. Below is a list of some of the many organizations from which we have received recognition for our environmentally-friendly design:

American Institute of Architects	U.S. Department of Housing & Urban Design	Sierra Club Environmental Design + Construction magazine
Boston Society of Architects	Office for Commonwealth Development	Multi-Family Executive magazine
The Home Depot Foundation	Northeast Sustainable Energy Association	Numerous other prestigious organizations
The Enterprise Foundation		

GREEN ACCOMPLISHMENTS

SAINT POLYCARP VILLAGE

At this LEED-Platinum certified development in Somerville, MA, we used double-wall construction to achieve high efficiency ratings. Rooftops have photovoltaic arrays, solar thermal collectors, and planted areas.

CROSS TOWN CORNERS

At this affordable multifamily development located in Springfield, MA, we laminated interior walls and foundations with rigid foam panels to enhance the energy efficiency of four masonry buildings.

TROLLEY SQUARE

At this new construction, affordable mixed-use community, storm water retention tanks installed beneath the corner park reduce the flow of storm water into the City's system. Clean storm water from the tanks is used to irrigate the planters in the central plaza. This project includes a 45-KW photovoltaic array.

COLUMBIA TERRACE APARTMENTS

At this affordable development located in Cambridge, MA, demolition and construction debris was salvaged for other uses, including landscaping.

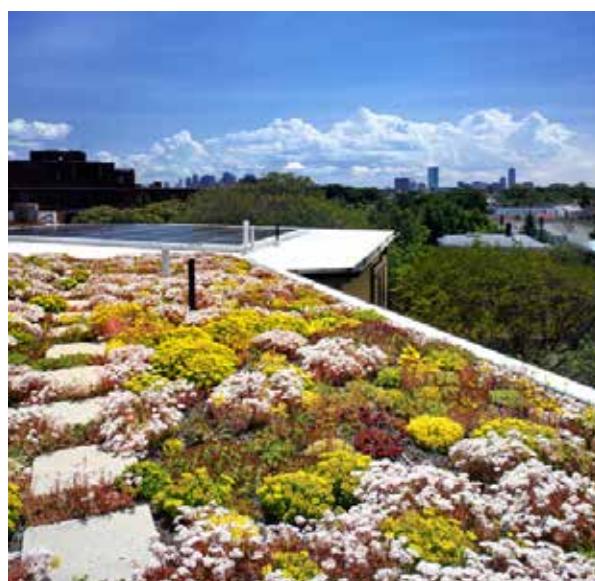
GREEN CONSULTING

Davis Square Architects is currently a green consultant to the Massachusetts Department of Housing & Community Development, the Massachusetts Technology Council, Enterprise Foundation's Green Communities Program, and the Community Economic Development Assistance Corporation.

OUR GREEN SERVICES

The following are steps that Davis Square Architects can provide to ensure sustainability:

1. **Green Screen:** evaluating programming plans to determine the most promising green opportunities on a particular site or building.
2. **Green Charrette:** a meeting early in the design process in which all stakeholders brainstorm ideas for energy and resource efficiency, generating goals and development strategies to accomplish them.
3. **Capital needs assessment:** a study focused on energy-saving opportunities and sustainable improvements.
4. **LEED documentation services:** meeting LEED certification requirements throughout the LEED certification process.
5. **Lifecycle analysis:** reviewing prioritized design goals to assist in the design-making process.
6. **Partnerships:** working with LEED-accredited consultants, clerks and contractors for the most effective green project team.
7. **Commissioning:** verifying that the building's envelope and systems operate as intended.
8. **Post-occupancy assessment:** measuring and reviewing actual energy savings after the project's completion and move-in. ■



SUSTAINABLE DESIGN OVERVIEW

davissquarearchitects.com

OUR PASSIVE HOUSE PROJECTS



SQUIRRELWOOD | CAMBRIDGE

Davis Square Architects has been trusted by Just-A-Start Corporation to develop new Passive House infill buildings in the Squirrelwood development. The Project involves the refinancing and renovating of Squirrel Brand Apartments (20 units) and Linwood Place (45 units), plus the addition of three new infill buildings (23 units), totaling 88 units in all. Nine turn-of-the-century wood frame six-family buildings will be fully renovated, including new exterior continuous insulation and air sealing to greatly improve their thermal performance. An historic candy factory, Squirrel Brand Company, will also be carefully preserved and modernized. The three new infill Passive House standard buildings are completed and one of them has achieved the 4th best air sealing of all Passive House projects in the US. Not simple "box" buildings, these buildings are highly articulated to fit into a tight urban site, have contemporary detailing to compliment the historic context, preserve greenspace by providing under-building parking, and roofs are topped by all-electric heat pumps and solar photovoltaic arrays.



DUDLEY CROSSING | BOSTON

Davis Square Architects has teamed up with Nuestra Comunidad Development Corporation on Dudley Crossing, an exciting new mixed-use project that will bring 24 affordable units to the Nubian Square neighborhood. A five-story building will consist of ground-floor commercial and retail space, and a mix of one-, two-, three- and four-bedroom units. A community space will also serve as a meeting room and provide laundry to two other adjacent existing buildings owned by Nuestra. Incorporating elements of the surrounding historic buildings and neighborhood, this beautifully designed new building will meet the City of Boston's Zero Emissions guidelines and will be Passive House-certified.



NORTH COMMONS | NORTHAMPTON

Village Hill at Northampton is currently under construction passive house project. Davis Square Architects has been working closely with The Community Builders and Valley Community Development Corporation. Village Hill consists of two buildings: North Commons, which will house 53 apartments and be Passive House-certified, and another building containing 12 units and commercial space. Targeting low- to middle-income households, the community will be mixed-income, and continues the redevelopment of the former Northampton State Hospital site.



MERRIMACK PLACE | HAVERHILL

Davis Square Architects has teamed up with the leading senior affordable housing provider, Bethany Community Services, on Merrimack Place. This will bring 62-unit residence in downtown Haverhill located on their existing Merrivista Campus. A skywalk will connect the new building to the existing residence, allowing all residents to take advantage of the expanded services. Some exciting project highlights include a wellness center and community life hub, where events and integrated programs will be hosted with community partners and organizations. This new construction will be Passive House- certified.



MARION ST | BROOKLINE

DSA is currently working with the Brookline Housing Authority on the design of a new 6 story building on Marion Street. The building will house 115 senior apartments and includes many common amenities. Indoor air quality and thermal comfort are of the upmost importance in this building where seniors will spend much of their time. The efficient building footprint and volume make it an ideal candidate for Passive House Certification. Construction is expected to begin in 2022.

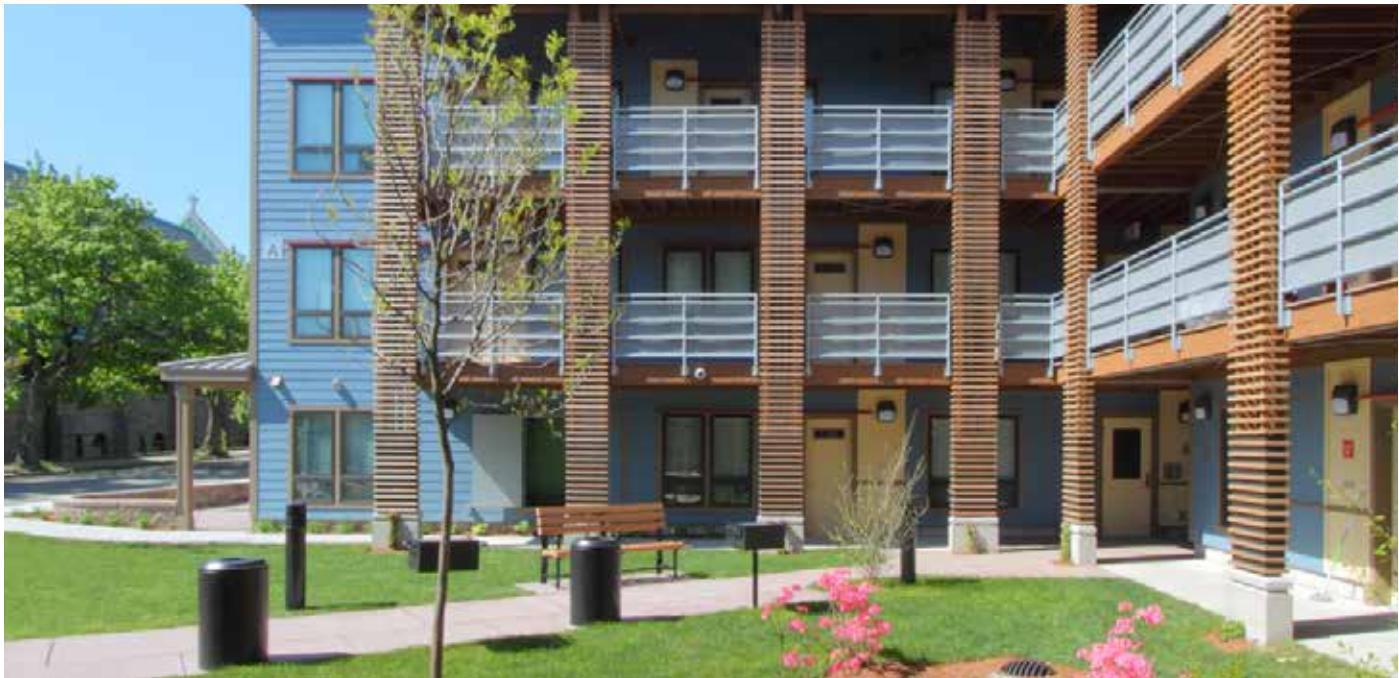


LEYLAND ST | BOSTON

Davis Square Architects has teamed up with Dorchester Bay Economic Development Corporation on 9 Leyland Street. This new, five-story building will provide 43 affordable, senior housing units to the Uphams Corner neighborhood of Dorchester. In addition to the new, contemporary, one- and two-bedroom apartments the development will include new interior and exterior common spaces, wellness care consultant and resident service offices as well as on-site laundry for the residents. It will also house a more than 700 square foot multi-function space available to the surrounding neighborhood for community meetings and other small public gatherings. The building will be LEED Certifiable and Passive House certified.

SUSTAINABLE DESIGN
davissquarearchitects.com

MULTI-FAMILY HOUSING



**OVER 30 YEARS OF
MULTI-FAMILY HOUSING
AND COMMUNITIES**



Our mission is to produce excellent design, to develop longterm relationships with clients, and to help build viable communities. Design solutions evolve through careful consideration of our clients' needs, constraints, and dreams. Our firm values and decades of experience in towns and cities throughout the Northeast have helped us create a longstanding history of designing beautiful, high-quality housing.

“ The home should be the treasure chest of living.
—Le Corbusier



FOCUSED EXPERIENCE

DAVIS SQUARE ARCHITECTS, INC. has been a leading advocate and designer of elderly and transition housing, affordable rental housing, and affordable home-ownership opportunities since 1984. We are committed to establishing long-term relationships with clients, residents, and neighbors; and we work hard to gain and retain their respect.

AWARD-WINNING DESIGN

Our housing designs have received awards for:

Smart growth

American Institute of Architects
Boston Society of Architects

Sierra Club
U.S. Department of Housing & Urban Design (HUD)

Office for Commonwealth Development (OCD)

Sustainable design

American Institute of Architects
Boston Society of Architects
NESEA Green Building

The Home Depot Foundation
The Enterprise Foundation

The EnergyStar Foundation
Environmental Design + Construction Magazine

Design leadership

Boston Society of Architects' Women in Design Award

FUNDING AGENCY ACCESS AND CREDIBILITY

In today's highly competitive market for resources, funding agencies at every level recognize Davis Square Architects as a valuable addition to any development team. The Massachusetts Department of Housing and Community Development (DHCD) has retained Davis Square Architects to review and evaluate OneStop funding applications, and we also have working relationships with MassHousing, Community Economic Development Assistance Corporation (CEDAC), Boston Redevelopment Authority, Boston Department of Neighborhood Development, Boston Landmarks, and the Massachusetts Historical Commission, in addition to consulting with numerous communities and developers.

SUSTAINABLE DESIGN

We are dedicated to creating sustainable design without overloading a project's budget. With numerous in-house LEED-accredited staff members, we have the ability to use commonly available materials to create a well-designed, energy-efficient and environmentally-friendly neighborhood.

PROJECT PLANNING AND COST CONTROL

We carefully monitor project budgets and work closely with owners to understand their requirements. We bring strict cost control and efficiency to each project, while still maintaining the highest standards of design quality. Many repeat clients have come to trust in our ability to develop thoughtful and cost-effective solutions. ■



MULTI-FAMILY HOUSING OVERVIEW

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LEYDEN WOODS

Leyden Woods is the redevelopment of an affordable housing community located in Greenfield, MA. The 56 buildings, which had been constructed in 1972, had reached the end of their useful lives. In order to preserve important affordable housing resources, all of the buildings were demolished and replaced with 49 buildings made up of 200 modular, factory-built ENERGY STAR®-compliant apartments. Davis Square Architects worked closely with The Community Builders on site-wide improvements to resident amenities, parking, and water management strategies, as well as the addition of greenspaces and an accessible walking and biking path. The eight-phase project features a mix of single flats and townhouses, with one-, two- and three-bedroom options. ■

LOCATION

Greenfield, MA

DEVELOPER

The Community Builders, Inc.

SCOPE

New construction
49 buildings
200 units



AWARD-WINNING

Charles L. Edson Tax Credit Excellence Award, Honorable Mention, HUD Preservation Properties



SUSTAINABLE DESIGN

Units are all ENERGY STAR®-compliant



DAVIS
SQUARE
ARCHITECTS

HOUSING & MIXED-USE
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VILLA AT MEADOW VIEW

Villa at Meadow View is the new construction of 33 units of senior housing located in Tewksbury, MA. Beginning with a master plan, Davis Square Architects worked with Elder Services of the Merrimack Valley in partnership with the Tewksbury Housing Authority to transform a vacant parcel of land located between existing multi-family housing into an exciting addition to the neighborhood.

The property amenities and highlights include a library equipped with a computer room as well as an arts and crafts room, dining room, patio, and an entryway with a fireplace. Villa at Meadow View has met all of the Enterprise Green Building Criteria, and is the first new senior housing complex to open in Tewksbury in over 30 years. ■

LOCATION

Tewksbury, MA

DEVELOPERS

Elder Services of the Merrimack Valley,
Tewksbury Housing Authority

SCOPE

New construction
Masterplanning
Age-restricted housing
HUD 202
33 units

SUSTAINABLE DESIGN

Project has met all Enterprise Green Building Criteria



HOUSING & MIXED-USE
davissquarearchitects.com



WAVERLEY WOODS

Affirmative Investments retained Davis Square Architects for the design of 40 affordable family units on a tight, steeply-sloped site (a 36-foot grade change from front to back) in Belmont, MA. After considering a variety of approaches, the design team arrived at a dramatically terraced scheme with the 40 units distributed throughout six buildings. A new stone-faced retaining wall also provides an attractive "gateway" into Belmont. Wayfinding, graphics and signage were also part of the project scope.

The structures and site are designed to exceed the Massachusetts DHCD standards for sustainable and accessible housing, with all units built to ENERGY STAR® Home standards. They have also been carefully detailed to fit into the scale and vocabulary of Belmont's finest homes. ■

LOCATION

Belmont, MA

DEVELOPER

Affirmative Investments

SCOPE

New construction
Transit-oriented design
40 units

AWARD-WINNING

Boston Society of Architects "John M. Clancy" award for Socially Responsible Housing, Affordable Housing Tax Credit Coalition "Charles Edson Tax Credit Excellence" (Honorable Mention), ABC Excellence in Construction "Residential" & "Green" award, Real Estate & Construction Review's "Green Building of America" award

SUSTAINABLE DESIGN

All units built to ENERGY STAR® Home standards



DAVIS
SQUARE
ARCHITECTS

HOUSING & MIXED-USE
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VILLAGE HILL AT NORTHAMPTON

Davis Square Architects is currently working on Village Hill at Northampton. Developed by The Community Builders and Valley Community Development Corporation, Village Hill consists of two buildings: North Commons, which will house 53 apartments and be Passive House-certified, and 35 Village Hill Road, which will contain 12 units and commercial space. Targeting low- to middle-income households, the community will be mixed-income, and continues the redevelopment of the former Northampton State Hospital site. ■

LOCATION

Northampton, MA

DEVELOPER

The Community Builders, Valley Community Development Corporation

SCOPE

New construction
2 buildings
65 rental units
Commercial space



SUSTAINABLE DESIGN

North Commons will be Passive House-certified



HOUSING & MIXED-USE
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ALEWIFE BROOK CONDOMINIUMS

On the site of the former Joyce Chen restaurant, Davis Square Architects designed this eight-unit development (one six-unit building, and one two-unit). While the site is very tight, the design of the units and site provides each resident with some private outdoor space. In order to achieve accessibility, the larger structure is a hybrid of townhouses and flats. The Alewife Brook condominiums received the ENERGY STAR® Outstanding Achievement Award for its energy-efficient windows, insulation, and heating and mechanical systems. In addition, the development is a five-minute walk from the MBTA Alewife subway station, making it an early great example of transit-oriented design and smart growth. ■

LOCATION

Cambridge, MA

DEVELOPER

Just-A-Start Corporation

SCOPE

New construction
Transit-oriented design
8 units



AWARD-WINNING

ENERGY STAR® Outstanding Achievement Award



SUSTAINABLE DESIGN

All units built to ENERGY STAR® Home standards



HOUSING & MIXED-USE

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DAVIS
SQUARE
ARCHITECTS



PARK HOLM | PHASE 2

A continuation of Davis Square Architects' partnership with the Newport Housing Authority, Park Holm Phase 2 is an exciting new feature of the existing Park Holm campus. Formerly occupied by a number of buildings in poor condition, the site was demolished to pave the way for 10 new six-unit buildings with all new site landscaping and infrastructure. Site upgrades include new parking areas, landscaping, and a walking path with passive recreation.

Providing 60 units of housing ranging in size from three- to four-bedrooms, the buildings are a mix of townhouse and flat-style apartments. Three units are handicap-accessible, with the remaining units adaptable. One additional unit is also equipped for the hearing-impaired.

All common spaces and amenities are fully accessible, as well as site grades, pathways and crosswalks. Handicap parking is also provided for each accessible unit. ■

LOCATION

Newport, RI

DEVELOPER

Housing Authority of the City of Newport

SCOPE

New construction
60 units



HOUSING & MIXED-USE
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CLIFFORD BOEHMER AIA

PRINCIPAL



PROFESSIONAL EXPERIENCE

Clifford Boehmer is a co-founder and Principal at Davis Square Architects. In 1989, he was a founder of Dirigo Design, a small Fort Point firm specializing in single-family homes.

Cliff's current responsibilities focus on site and project feasibility analysis, conceptual and schematic design, master planning and programming, project advocacy with government and funding agencies, neighborhood engagement, permitting, and renovation/adaptive reuse of historic buildings. He reviews state-funded housing proposals for the Massachusetts Department of Housing & Community Development (DHCD) and consults with many communities and developers in Massachusetts and Rhode Island.

Before pursuing a full-time architectural career, Cliff was known throughout the Early Music world as a maker of historically informed keyboard instruments. He has taught studios at the Graduate School of Design (Harvard), Massachusetts Institute of Technology, the Museum of Fine Arts (Boston), and the National Conservatory in San Sebastian, Spain. His housing designs, musical instruments, and architectural photographs have been published in magazines, journals, and city guides. He sits on boards of the Cambridge Society for Early Music and the Boston Clavichord Society.

EDUCATION

Harvard Graduate School of Design
Master in Architecture, 1987

Massachusetts Institute of Technology
Bachelor of Science in Art and Design, 1974

REGISTRATION

Architect Licensure: Massachusetts

AFFILIATIONS

American Institute of Architects
Boston Society of Architects

LAURA CELLA-MOWATT RA

ASSOCIATE



PROFESSIONAL EXPERIENCE

Laura Cella-Mowatt is an Associate and Vice President of Business Development at Davis Square Architects. She has been with the firm since 2006 and has professional architectural experience working as a designer, clerk-of-the-works, job captain, and project architect. A leader at the firm, she works on a range of project types including adaptive reuse, historic renovation, and new construction. Laura excels at problem solving and welcomes the challenges associated with the fast-paced nature of construction administration.

Laura is currently working with OppCo and Nuestra Comunidad Development Corporation on the design of Dudley Crossing, an exciting new transit-oriented, mixed-use project featuring both new construction and historic renovation. The new building will be Passive House certified, bringing 24 affordable units and retail space to Roxbury's Nubian Square neighborhood. She is also working with Lena New Boston on 47 affordable family apartments at Olmstead Green, currently under construction in Mattapan. Her past projects include rehabilitating 146 units of housing in 25 buildings scattered throughout Boston's Historic South End with The Community Builders, and working with Roxbury Tenants of Harvard on the renovation of their Longwood properties. Additional projects include the adaptive reuse of an historic mill building in Leominster, MA with NewVue Communities; with Preservation of Affordable Housing (POAH) on an occupied rehab of senior apartments in Orleans, MA; and with Bridge Over Troubled Waters on the renovation of shelter for teenage runways and young mothers.

Outside of the office, Laura has worked as a studio instructor at the Boston Architectural College and has served as a design mentor for the FHLB Greater Boston Affordable Housing Development Competition.

EDUCATION

Virginia Tech
Bachelor of Architecture, 2006

REGISTRATION

Architect Licensure: Massachusetts

JANET CHIAHUA CARON

DESIGNER



PROFESSIONAL EXPERIENCE

Janet Caron joined Davis Square Architects as a designer in 2018. Prior to joining the firm, she previously worked on designs for housing, MBTA facilities and stations. Janet has experience creating presentations, BIM models, unit plans, details and renderings, as well as graphic design skills. She also interned for a firm in Taiwan, where she worked on mid-high-rise residential designs.

Janet is currently working on 126 Chandler Street, the adaptive reuse of the historic former Torrey Razor Co. plus a new five-story addition in Worcester, MA. The project will create 31 units of affordable housing for residents and families as well as 1,700 sf of commercial space along Chandler Street. She is also working on Haynes House, a 131-unit, seven-story high-rise located in Roxbury, MA. One of the project's exciting highlights is the all-new 300-foot façade replacement, a significant design and energy efficiency opportunity. Interior improvements, energy efficiency, life safety and accessibility upgrades, and new or renovated common area amenities are also part of the project scope.

Janet received her Bachelor of Arts in Land Economics & Urban Planning with distinction from National Chengchi University in Taipei, Taiwan, and is a recent graduate of Wentworth Institute of Technology, having received her Master of Architecture in 2017.

EDUCATION

Wentworth Institute of Technology
Master of Architecture, 2017

National Chengchi University
Bachelor of Arts in Land Economics & Urban Planning
with distinction, 2014

KYUYEON PARK

LEED GREEN ASSOCIATE,
CPHC

DESIGNER



PROFESSIONAL EXPERIENCE

Kyuyeon Park is a designer at Davis Square Architects, and works carefully with clients to develop design and construction documents that accurately and thoughtfully create the spaces they desire, in addition to presentations and supporting graphics. She is particularly skilled at renderings, hand-sketching and model-making.

Kyuyeon's current projects include Bartlett Station, Building A, the next phase of development at Bartlett Station in Roxbury, Massachusetts. Building A is a LEED Gold-certified mixed-use new building with 36,000 sf of retail and office space, plus 42 affordable rental units. She is also working on 370 Essex Street, the adaptive reuse of an historic building and addition of a new building on an adjacent vacant lot into approximately 7,700 square feet of commercial space and 39 apartments in Lawrence, Massachusetts.

Kyuyeon graduated from the Rhode Island School of Design with her Master of Architecture. Her thesis, *Redundant and Resilient Architecture*, focused on how the design principle of redundancy and loose-fit can increase a building's flexibility and resiliency. Kyuyeon also received both her Bachelor of Science in Physics and Bachelor of Engineering in Electronic Engineering from Sogang University in Korea. She is a Certified Passive House Consultant and LEED Green Associate.

EDUCATION

Rhode Island School of Design
Master of Architecture, 2018

Sogang University
Bachelor of Science in Physics, 2011
Bachelor of Engineering in Electronic Engineering, 2011

AFFILIATIONS

LEED Accredited – Leadership in Energy and Environmental Design
Certified Passive House Consultant (CPHC)

[®]

Kyuneon Park

has fulfilled the requirements for becoming a

PHIUS CERTIFIED PASSIVE HOUSE CONSULTANT

This certificate hereby attests that the above-named Consultant has completed training provided by PHIUS relating to construction of buildings that can meet the criteria of the PHIUS+ Passive Building Standard for North American climate zones and has passed PHIUS' examination.

Buildings designed, modeled and constructed to meet the PHIUS+ Passive Building Standard are ultra-efficient and characterized by superior indoor air quality, thermal comfort and durability.

The minimized energy demands of passive houses and buildings reduce building operating costs permanently, while also mitigating the impact of energy price increases over time. The low power requirements provide resilience

Professional Number

2/28/2020

Date Issued

7/15/2023

Valid Through

during outages and help avoid time-of-use surcharges. Buildings successfully designed and quality assured to the PHIUS+ Passive Building Standard can achieve carbon neutrality with the addition of a small renewable generation system, thereby putting owners and occupants firmly on the path to a carbon-neutral lifestyle.

PHIUS is the leading North American organization conducting research, training and certification relating to passive buildings. PHIUS' training is the most comprehensive in the industry. Consultants who complete PHIUS' training and pass its rigorous examination are prepared to design buildings maximizing energy efficiency.



Executive Director

Awards and Recognition– Affordable Housing

Preservation Massachusetts Robert H. Kuehn Award 2019: **Ivory Keys Apartments**

Mass Housing Award For Excellence 2017:

Highest MBE dollar and workforce hour percentages and total MBE and WBE workforce hours:

Madison Park Phase III

Newburyport Preservation Trust 2014:

Preservation Award for Sensitive addition to a Historic Building

11 Market Street Apartments



L.D. RUSSO
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Projects– Affordable Housing

Lighthouses 34 and 47, Salem– 46 Units * *Pre-construction*
YWCA Hillside Housing, Newburyport– 10 SRO * *Start Fall 2020*
126 Chandler Street, Worcester– 31 units, LIHTC * *In progress*
236 Auburn Street, Newton– 3 units and 5 unit Congregate Home
Salisbury Square Apartments, Salisbury– 42 units, multi site, LIHTC
Ivory Keys Apartments, Leominster – 41 units, LIHTC, Historic Tax Credits
Madison Park Village III, Roxbury– 120 units Occupied Renovation
11 Market Street Apartments, Newburyport- 10 Units
Peter Bulkeley Terrace, Concord- 24 Units, LIHTC
Bowers Brook Apartments, Harvard- 42 Units, LIHTC
Southgate Apartments, Worcester- 25 Units, LIHTC
The Blakeley Building, Lawrence- 46 units, 4 retail suites, LIHTC
Harvard Green Condominiums, Harvard- 32 units (8 affordable)
Dickson Meadows Condominiums, Weston– 22 units (6 affordable)
Scarito Homes, Lawrence- 10 Units
Winchendon Housing Authority:, Winchendon- 26 units
Montachusett Veterans Housing, Offices and Food Pantry, Gardner– 19 SRO and apartments
Tewksbury Housing Authority, Tewksbury- 24 units
W. Newbury Housing Authority, West Newbury—24 units
Clinton Housing Authority, Clinton- 2 facilities, special needs congregate housing
West Boylston Housing Authority, West Boylston- 2 facilities, special needs congregate housing
Holliston Housing Authority, Holliston- 6 units



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PASSIVE HOUSE CONSTRUCTION



Project Name: The Waring School

Description: Passive House new school construction

Architect: OPAL Architects

Key Facts: \$4M, 12,800 s.f. Passive House designed construction for a Massachusetts Independent School. Design features include 6" continuous EPS insulation at the exterior of the building, Unilux German window and curtainwall systems, and permeable exterior pavers.

L.D. Russo was brought in as part of a re-imagining of the project after it had gone overbudget in development. In partnership with the owner and new architect, value engineering and competitive bidding got the job back on budget and allowed construction to proceed.

Project Status: In Progress. Completion Anticipated March 2021



L.D. RUSSO

General Contracting • Construction Management



PASSIVE HOUSE CONSTRUCTION



Project Name: YWCA Hillside Apartments

Description: Passive House 10 Unit SRO, 100% Affordable

Architect: Moscow Linn Architects, Inc.

Key Facts: Passive House new construction of 10 affordable SRO units for the YWCA of Greater Newburyport. This project is the affordable component of the larger Hillside apartments, a net zero energy multi-family development that incorporates passive design, solar energy, community gardens and other green features.

L.D. Russo provided pre-construction services including budgeting, design and detail review, PHIUS detailing and value engineering, and will be the contractor for construction.

Project Status: Construction start anticipated October/November 2020



L.D. RUSSO
General Contracting • Construction Management



PASSIVE HOUSE CONSTRUCTION



Project Name: The Lighthouses

Description: Passive House multi-site project. 46 units of 100% Affordable Housing

Architect: ICON Architects

Key Facts: Two sites with podium construction, Passive house design. 46 units, plus community and commercial space. Contemporary modern exteriors and community walkway features reflect the North Shore CDC's unique stamp on their neighborhoods.

L.D. Russo provided pre-construction services including multiple budgets, value engineering and constructability discussions, and will serve as the CM/GC when construction starts.

Project Status: Entering second DHCD Funding Round. Construction Start Anticipated (subject to award) Q4 2021



L.D. RUSSO

General Contracting • Construction Management



LIHTC AFFORDABLE HOUSING



Project Name: 126 Chandler Street

Description: 31 units, 100% Affordable, LIHTC

Architect: Davis Square Architects

Key Facts: Restoration of an existing mill building plus a 5 story addition, podium construction, resulting in 31 apartments, community space, and a tenant commercial space. During construction, a rooftop greenhouse has been added.

Project Status: Under construction. Completion anticipated Summer 2021.



L.D. RUSSO
General Contracting • Construction Management



LIHTC AFFORDABLE HOUSING



Project Name: Ivory Keys Apartments

Description: 41 units Affordable Housing, LIHTC and Historic Tax Credits

Architect: Maugel Architects

Key Facts: Developed by L.D. Russo, Inc., this project restored the Jewett Piano Factory in downtown Leominster to its former glory. The project included 41 units of affordable housing in a mix of studio, 1, 2, and 3 bedroom units. One of the unique challenges of this project included squaring up the existing wood frame which was leaning over 12" from the roof to the ground at the start of construction.

Project Status: Completed Summer 2018



L.D. RUSSO

General Contracting • Construction Management



LIHTC AFFORDABLE HOUSING



Project Name: Residences at Salisbury Square

Description: 42 units affordable housing, LIHTC

Architect: Maugel Architects

Key Facts: Developed by L.D. Russo, Inc. in partnership with the YWCA of Greater Newburyport, this project included 3 buildings on two sites, creating 42 units of affordable housing in Salisbury, MA. The project incorporated solar hot water, upgraded to triple glazed windows, and met historic requirements for the Town of Salisbury.

Project Status: Completed Phase 1 Q1 2019, Phase 2 summer 2019.



L.D. RUSSO

General Contracting • Construction Management



**Nathaniel F. Coughlin
President, L.D. Russo, Inc.**

198 Ayer Road Harvard, MA 01950
nat@ldrusso.com

Current:

President (September, 2020), Vice President (Harvard, MA. June 2007 to 2020)
L.D. Russo, Inc.

- In business since 1977, L.D. Russo, Inc. provides construction services including General contracting, construction management, and sitework and utilities. L.D. Russo, Inc. has also successfully helped develop affordable housing through the LIHTC and DHCD funding programs.
- As Vice President, Nat managed the full construction operations for the company, including estimating, project management, staffing, customer and contractor relations. In 2020, Nat became the President of the company, taking over for Lou Russo, the founder.

Selected Projects and achievements during tenure:

- Involved in construction of nearly 400 units of affordable housing.
- Increased and sustained construction value since recession of 2009.
- Passive House Certification
- Expanded staff and increased construction capabilities
- Affordable housing development, including multi project partnership with the YWCA of Greater Newburyport.

History:

Project Manager

Owings Mills, MD. July 2004- May 2007

Daniel G. Schuster Construction

- Overview: Schuster Concrete is one of the largest concrete contractors in the region, with over \$100M of work in 2006.
- Responsible for field operations for multiple projects, with combined monthly billings of \$1-2.5 million.

Notable projects:

- Gaylord Hotel/National Harbor- Place and finish 1.5M s.f. of concrete slabs for 20 story hotel.
- Prince George's Country Regional H.S.-\$6.6M/ 434,000 s.f. new High school construction.
- Canton Crossing Tower and Central Plant- 20 story office tower and 2 story parking garage on the Baltimore waterfront.
- Dreyer's Ice Cream-Big Scoop Project- \$3.3M/ 600,000 s.f. new construction with rigorous quality requirements.

Safety Director

Daniel G. Schuster Construction

Owings Mills, MD. January 2003- June 2004

- First full-time safety director at Schuster Concrete: Played a key role in the development of an industry leading safety culture that targeted high risk activities and reduced incidents, lost time, and insurance costs.
- Conveyed safety training and regulations to 150+ Spanish speaking employees.
- Spent 60-80% of time in the field performing safety evaluations of high risk jobs, regular safety meetings, and enforcing safety regulations.

Spanish Teacher (Brooklandville, MD. 2001-2003)

St. Paul's School

Independent Insurance Agent (Towson, MD. 1998- 2001)

Coffey & Company, Inc.

EDUCATION

Middlebury College, B.A. International Politics/Latin American Politics (May, 1998)

OTHER

Language: Bilingual (Spanish)

Sports: Trail Running, Ultramarathons, Fly Fishing, sailing

Community:

Past Chair- River Valley Charter School Board of Trustees

Past Vice Chair- Newburyport Housing Authority

Past Member- Newburyport Zoning Board of Appeals



Elena J. Russo
Lead Estimator
elena@ldrussocom

Lead Estimator

January 2019 – Present

- GC Bidding- Plan review, Subcontractor and vendor communication, preparation of complete bids for public and private construction projects.
- Pre-construction services- Preparation of budgets, Constructability review, Identification of design/budget target areas

L.D. Russo, Inc.

Volunteer, Board of Directors – Past Member

January 2016 – Present

Our Neighbors' Table

- Secretary of the Board of Directors; Chair of the Governance Committee; Finance Committee
- Volunteer in weekly market. Assist food-insecure guests at the market each week in a manner that provides dignity, respect, and kindness; assist in occasional food drives in the warehouse

Volunteer Court Advocate & Hotline

Newburyport & Amesbury, MA; April 2013 – Present

Jeanne Geiger Crisis Center

- Assist victims of domestic violence to navigate the court system when seeking protective orders or attending other hearings; inform clients of ongoing services available to them through JGCC and connect them with care as needed; provide emotional support and assistance with safety planning both in the courthouse and on the over-night Hotline.

Yoga Teacher

Newburyport, MA, Baltimore City & Westminster, MD; April 2004 – Summer 2012

Self-employed

- Teach Traditional Hatha and Vinyasa yoga to beginner, intermediate, and advanced classes at several prominent yoga studios

Center Director

Ellicott City & Towson, MD; September 2002 – February 2004

SCORE! Educational Centers

- Provided direct education to students ages 4-18 in math, reading, writing, and other academic areas, while simultaneously building students' self-confidence and eagerness to learn.

Health Center Director

Annapolis, MD; September 2001 – August 2002

Planned Parenthood of Maryland, Inc.

- Responsible for management of all aspects of health center operations.

EC Grant Coordinator

Baltimore, MD; June 2000 – August 2001

Planned Parenthood of Maryland, Inc.

- Initiated project to increase access to Emergency Contraception (EC) for all Maryland women.

Executive Assistant to CEO

Odenton, MD; July 1999 – May 2000

Guardian Services Group, Ltd.

- Provided administrative support to CEO of international transportation company with 200 employees.

Assistant Office Manager, Project Management and Estimating

Ayer, MA; 1987 – 1998

L.D. Russo, Inc.

EDUCATION

Bachelor of Arts (May, 1999)

Middlebury, VT; 1995 – 1999

Middlebury College

- Major: Molecular Biology and Biochemistry; Minors: Psychology and Art History.

Diploma

Harvard, MA; 1992-1995

Bromfield School

L.D. Russo, Inc.

Julie A. Sirois, Project Manager

198 Ayer Road Harvard, MA 01451
julie@ldrusso.com

Current:

Senior Project Manager (Harvard, MA 09/13 to Present)

L.D. Russo, Inc.

- Responsible for Project Schedule, Quality, and Owner/Subcontractor relations
- Provides management of subcontractor and vendor contracts, change management and billing.
- Selected Projects
 - Lexington Visitors Center
 - 236 Auburn Street Housing
 - Residences at Salisbury Square
 - Ivory Keys Apartments
 - Madison Park Villages III
 - Countryside Healthcare of Milford

History:

Self Employed (1996 to present, Stow, MA)

Sirois Designs

- Design and drafting of Residential remodels & renovations
- Full Construction Drawings

Retail shop and Tasting Room Manager (09/09 To 8/13, Bolton, MA)

Nashoba Valley Winery

- Manage Winery
- Retail Sales, Tastings, Tours, Store Layout and Display
- Customer Service
- Monitor Retail Inventory, Monthly Sales Reports
- Interviewing & Hiring new Employees
- Monthly & Weekly Scheduling for 20+ Employees

Engineer (10/07 to 01/09, Marlboro, MA)

Tata & Howard, Inc.

- Design and drafting of Water Treatment Facilities
- CAD Drawings

Education:

Roger Williams University Bristol, RI
Bachelor of Science Civil Engineering
Associates in Science Architectural Engineering

Computer Skills:

Proficient in MS Word, Excel, POS Systems, Primavera Project Management, Project Scheduling

Personal Interests:

Skiing, Running, Biking, Hiking, Traveling, Reading



RELEVANT FIRM EXPERIENCE

HUDSON, MA

HUDSON TOWN HALL - BASEMENT AIR HANDLING UNIT REPLACEMENT

Client: Town of Hudson

Location: Hudson, Massachusetts

Scope: Plumbing and Electrical consulting engineering services for the replacement of an existing air handling unit within the basement mechanical room.

Construction Costs: \$30,000

HUDSON TOWN HALL – HVAC UPGRADES

Client: Town of Hudson

Location: Hudson, Massachusetts

Scope: Mechanical and Electrical consulting engineering services for renovating the existing heating, ventilating and air conditioning system for the existing 22,480 square foot Town Hall. The overall objective is to replace the basement heating system and controls, evaluate the chiller plant and determine if an exhaust liner system is required within the historic brick chimney structure, replace components related to air conditioning serving the first level and third level spaces.

Construction Costs: \$185,000

HUDSON HIGH SCHOOL - ENERGY RECOVERY UNIT REPLACEMENTS

Client: Hudson Public Schools

Location: Hudson, Massachusetts

Scope: Mechanical and Electrical consulting engineering services for demolition of two (2) existing energy recovery units, ductwork and controls; and replace with new energy recovery units including integral air conditioning with ductwork, piping, insulation controls; disconnect/reconnect of gas piping; power to support the new energy recovery units and associated equipment; and new electrical power feeders from main electrical room.

HUDSON PUBLIC SCHOOLS BUILDING ASSESSMENTS - RE-OPENING COVID 19 CONSIDERATIONS

Client: Hudson Public Schools

Location: Hudson, Massachusetts

Scope: Mechanical and Electrical consulting engineering services to review existing HVAC and Electrical systems at the following schools: Farley Elementary, Forest Ave. Elementary, Hudson High School, Mulready Elementary and Quinn Middle School; prepare a report outlining the existing conditions relative to improvements to air quality and system operation within the buildings including electrical service capacity for incorporation of additional HVAC equipment; and provide recommendations for improvement for system operation for re-opening the public schools relative to COVID-19.

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CONSULTANTS

T: 978.486.4301 F: 978.428.0067



RELEVANT FIRM EXPERIENCE

PASSIVE HOUSE/NET ZERO

RESIDENTIAL BUILDING - SPENCER STREET

Client: Studio Luz Architects, Ltd

Location: Boston, MA

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for new residential building consisting of 4-story building with 23 apartments and amenity spaces totaling approximately 25,400 square feet of space. This project was designed utilizing passive house standards.

RESIDENTIAL BUILDING - NEW ENGLAND AVENUE

Client: Studio Luz Architects, Ltd

Location: Boston, MA

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for new residential building consisting of 4-story building with 19 apartments and amenity spaces totaling approximately 20,000 square feet of space. This project was designed utilizing passive house standards.

RESIDENTIAL BUILDING - 270 TALBOT AVENUE

Client: Studio Luz Architects, Ltd

Location: Boston, MA

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for residential building consisting of new 4-story building with first floor retail/amenity space and three upper floors with 21 apartments. This project was designed utilizing passive house standards.

JUST A START – 52 NEW STREET

Client: Rode Architects, Inc.

Location: Cambridge, Massachusetts

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for new building with podium level (parking, retail, office) and four levels of residential above with 100 apartment units. This project was designed utilizing passive house standards.

SQUIRRELWOOD

Client: Davis Square Architects, Inc.

Location: Cambridge, Massachusetts

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for new residential building consisting of 4-story building with 14 apartments and amenity spaces totaling

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RELEVANT FIRM EXPERIENCE

PASSIVE HOUSE/NET ZERO

approximately 15,300 square feet of space. This project was designed utilizing passive house standards.

DUDLEY CROSSING – DUDLEY STREET

Client: Davis Square Architects, Inc.

Location: Boston, Massachusetts

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for renovations 375-385 Dudley Street (9 residential units and retail space) and 204-210 Hampden Street (15 units and retail space); and full MEPFP design for a new building at 387-397 Dudley Street (24 units, community space and laundry). This project was designed utilizing passive house standards.

1005 BROADWAY

Client: Utile, Inc.

Location: Chelsea, MA

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for 5-story residential building with lower level amenity/parking totaling approximately 60,000 square feet of space. This project was designed utilizing passive house standards.

MERRIVISTA APARTMENTS – BUILDING ADDITION

Client: Davis Square Architects, Inc.

Location: Haverhill, MA

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for a (6) story standalone addition to an existing building with 62 apartments and amenity spaces. This project was designed utilizing passive house standards.

HEBREW SENIOR LIFE - EXPANSION

Client: Icon Architecture

Location: Randolph, MA

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for a new residential addition building with three levels including (45) apartments, program spaces and common areas. The new addition is approximately 40,000 square feet. This project was designed utilizing passive house standards.

BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, Massachusetts 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



RELEVANT FIRM EXPERIENCE

MULTIFAMILY RESIDENTIAL

555 SOUTH UNION STREET

Client: Davis Square Architects, Inc.

Location: Lawrence, Massachusetts

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for a (3) level residential building with each level of 7,600 sf for a total of 22,800 sf.

872 MORTON STREET, MATTAPAN, MA

Client: Davis Square Architects, Inc.

Location: Boston, Massachusetts

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for a 4-story residential building with 40 apartments, common areas, amenity spaces over ground level podium lower level parking totaling approximately 57,300 square feet of space.

BAYSTATE PLACE RENOVATIONS

Client: Davis Square Architects, Inc.

Location: Springfield, Massachusetts

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for high-rise apartment building complex including three interconnected buildings. Building A (12-stories), Building B (8-stories), and Building C (13-stories) include 23 studio units, 264 1-bedroom units, and 59 2-bedroom units

126 CHANDLER STREET RENOVATION/ADDITION

Client: Davis Square Architects

Location: Worcester, Massachusetts

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for residential building with first level retail and four levels of residential space above with apartments lobby and common areas totaling approximately 45,000 square feet.

RESIDENTIAL APARTMENTS - 327 ELMWOOD STREET

Client: Davis Square Architects, Inc.

Location: Providence, Rhode Island

Scope: Mechanical, Electrical and Fire Protection consulting engineering services for a new six level (and basement) residential building with 39 apartments and common spaces.

BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, Massachusetts 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



RELEVANT FIRM EXPERIENCE

MULTIFAMILY RESIDENTIAL

1005 BROADWAY

Client: Utile, Inc.
Location: Chelsea, MA
Scope: Mechanical, Electrical and Fire Protection consulting engineering services for 5-story residential building with lower level amenity/parking totaling approximately 60,000 square feet of space.

SIRK & CHESTNUT SQUARE

Client: DMS Design, LLC
Location: Lowell, MA
Scope: Mechanical, Electrical and Fire Protection consulting engineering services for residential building renovations to include: include heating, cooling and ventilating of buildings including individual space controls and equipment; and heating, cooling and ventilating of building; domestic cold water, individual electric or gas fired domestic hot water, sanitary sewer and gas piping systems; new wet type sprinkler system, except for unheated spaces of combustible construction where a dry system will be required; power including limited power; fire alarm signage and limited lighting.

RESIDENCES AT EDGE BROOK

Client: Market Square Architects, LLC
Location: Merrimack, NH
Scope: Mechanical, Electrical and Fire Protection consulting engineering services for 4-story building with 76 apartments over podium parking; three similar 4-story buildings with 52 apartments over podium parking; and a 5,000 square foot clubhouse.

NEW MULTI FAMILY HOUSING - 951-959A DORCHESTER AVENUE

Client: Prellwitz Chilinks Associates
Location: Dorchester, MA
Scope: Mechanical, Electrical and Fire Protection consulting engineering services for new building consisting of: lower level commercial space (7,000 SF); four upper levels with 38 single level apartments, base building, amenity spaces; and a lower level garage.

455 HARVARD STREET

Client: Cube 3 Studios
Location: Brookline, Massachusetts
Scope: Mechanical, Electrical and Fire Protection consulting engineering services for new mixed use building with a first level of Retail, Lobby, Utility and Parking totaling approximately 6,750 sf; and three levels of 17 residential units above totaling approximately 20,000 sf.

BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, Massachusetts 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



PROJECT TEAM RESUMES

KENNETH R. BECK, P.E., LEED AP, MCPPO, CPHC, PRINCIPAL

MECHANICAL

EDUCATION:

Dartmouth College, Hanover, New Hampshire
B.A., Engineering 1988

Thayer School of Engineering, Dartmouth College, Hanover, New Hampshire
B.E., Mechanical/Structural Engineering, 1989

REGISTRATION/PROFESSIONAL AFFILIATIONS:

Member of American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE)
Member of National Society for Professional Engineers (NSPE)
Member of International Code Council (ICC)
State of Illinois Board of Education Energy Conservation Code Plan Reviewer
Certified Passive House Consultant (CPHC)

Registered Professional Engineer:

Massachusetts Registration	38446	New Hampshire Registration	10822
Connecticut Registration	23373	Vermont Registration	8315
Maine Registration	10224	New Jersey Registration	44557
New York Registration	080300	Pennsylvania Registration	062097
Rhode Island Registration	7657	Virginia Registration	0402-042248
Oklahoma Registration	22236	Florida Registration	65060
Indiana Registration	10809191	Illinois Registration	062.063878
Georgia Registration	036396	Texas Registration	97105
District of Columbia Registration	907543	Maryland Registration	45820
Tennessee Registration	00118344	Michigan Registration	6201068485
Washington Registration	58180	Nevada Registration	028228
Missouri Registration	2018015409		

PROFESSIONAL EXPERIENCE:

1999 to Present	<u>BLW Engineers, Inc., Littleton, MA</u> Principal
1990 to 1999	<u>Richard D. Kimball Company, Inc., Andover, MA</u> Project Manager
1989 to 1990	<u>Bayside Engineering Associates, Inc., Boston, MA</u> Junior Structural Engineer

PROJECT EXPERIENCE:

Mr. Beck is a Principal of the company with thirty-two years of experience in the design of mechanical building systems for various size and types of projects including: Office, Institutional, Industrial, Educational, Hotel, Medical, Retail, Commercial, Military, Transportation/Airport, Housing, Municipal, and Federal Facilities. Design experience includes MGL Chapter 149 Public Bidding, Design Build and Selective Bid for Private Clients.

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CONSULTANTS

T: 978.486.4301 F: 978.428.0067



Ken Beck

has fulfilled the requirements for becoming a

PHIUS CERTIFIED PASSIVE HOUSE CONSULTANT

This certificate hereby attests that the above-named Consultant has completed training provided by PHIUS relating to construction of buildings that can meet the criteria of the PHIUS+ Passive Building Standard for North American climate zones and has passed PHIUS' examination.

Professional Number

3215

11/20/2020

Date Issued

1/15/2024

Valid Through

during outages and help avoid time-of-use surcharges. Buildings successfully designed and quality assured to the PHIUS+ Passive Building Standard can achieve carbon neutrality with the addition of a small renewable generation system, thereby putting owners and occupants firmly on the path to a carbon-neutral lifestyle.

PHIUS is the leading North American organization conducting research, training and certification relating to passive buildings. PHIUS training is the most comprehensive in the industry. Consultants who complete PHIUS' training and pass its rigorous examination are prepared to design buildings maximizing energy efficiency.



Karen S.

Executive Director



PROJECT TEAM RESUMES

WILLIAM J. SCANLON, P.E., PRINCIPAL

MECHANICAL

EDUCATION:

University of Massachusetts at Lowell, Lowell, Massachusetts
B.S., Mechanical Engineering, 1997

University of Massachusetts at Lowell, Lowell, Massachusetts
B.S., Industrial Management, 1997

REGISTRATION/PROFESSIONAL AFFILIATIONS:

Member of American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE)
Member of National Society for Professional Engineers (NSPE)
Member of International Code Council (ICC)

Registered Professional Engineer:

Massachusetts Registration 45449
Connecticut Registration 24395

PROFESSIONAL EXPERIENCE:

2009 to Present	<u>BLW Engineers, Inc., Littleton, MA</u> Principal
2000 to 2009	<u>BLW Engineers, Inc., Littleton, MA</u> Mechanical Engineer
1997 to 2000	<u>Richard D. Kimball Company, Inc., Andover, MA</u> Mechanical Engineer
1996 to 1997	<u>MicroTouch., Methuen, MA</u> Mechanical Engineer
1993 to 1996	<u>WJS Mechanical, Tewksbury, MA</u> HVAC Apprentice Technician

PROJECT EXPERIENCE:

Mr. Scanlon is a Principal of the company with twenty-eight years of experience in the design of mechanical building systems for various size and types of projects including: Office, Institutional, Industrial, Educational, Hotel, Retail, Commercial, Military, Housing, and Municipal. Design experience includes MGL Chapter 149 Public Bidding, Design Build and Selective Bid for Private Clients.

BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, Massachusetts 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



PROJECT TEAM RESUMES

JOHN C. PIERGA, P.E., PRINCIPAL

ELECTRICAL

EDUCATION:

Southern Massachusetts University, North Dartmouth, Massachusetts
B.S., Electrical Engineering, 1986

REGISTRATION/PROFESSIONAL AFFILIATIONS:

Registered Communications Distributions Designer (RCDD), 1997

Registered Professional Engineer:

Massachusetts Registration	48291	New Hampshire Registration	12868
Connecticut Registration	27418	Vermont Registration	80816
New York Registration	089355	Maine Registration	12240
Georgia Registration	PE036421	Indiana Registration	11100382
Virginia Registration	0402-055372		

PROFESSIONAL EXPERIENCE:

2009 to Present	<u>BLW Engineers, Inc., Littleton, MA</u> Principal
2003 to 2009	<u>BLW Engineers, Inc., Littleton, MA</u> Senior Electrical Engineer
2001 to 2003	<u>Johnson Engineering & Design, Inc., Danvers, MA</u> Senior Electrical Engineer
1999 to 2001	<u>Boston Light Source, Boston, MA</u> Lighting Sales
1994 to 1999	<u>Richard D. Kimball Company, Inc., Andover, MA</u> Senior Electrical Engineer
1988 to 1994	<u>Interstate Electrical Services Corporation, North Billerica, MA</u> Electrical Engineer, Engineering Department Manager

PROJECT EXPERIENCE:

Mr. Pierga is a Principal of the company with thirty-five years of experience in the design of electrical and telecommunications building systems including: power distribution, lighting design, fire alarm systems design, security systems, telecommunication system wiring design, life-safety and emergency generator designs. His experience includes: designs for Offices, Educational, Hotel, Medical, Underground Utility Terminal Systems, Historical Restoration, Retail, Industrial, Housing, Municipal, and Federal Facilities. Design experience includes: Electrical Design/Build, MGL Chapter 149 Public Bidding and Private Clients.

BLW ENGINEERS, INC.

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CONSULTANTS

T: 978.486.4301 F: 978.428.0067



PROJECT TEAM RESUMES

MICHAEL J. DENOMMEE, P.E., LEED AP, PRINCIPAL

PLUMBING & FIRE PROTECTION

EDUCATION:

University of Massachusetts Lowell, Lowell Massachusetts
B.S., Mechanical Engineering, 2004

REGISTRATION/PROFESSIONAL AFFILIATIONS:

Registered Professional Engineer:

Massachusetts Registration **49888**

Massachusetts FE

PROFESSIONAL EXPERIENCE:

2016 to Present	<u>BLW Engineers, Inc., Littleton, MA</u> Principal
2004 to 2016	<u>BLW Engineers, Inc., Littleton, MA</u> Senior Mechanical Engineer
1999 to 2004	<u>Denommee Plumbing and Heating Inc, Tyngsboro, MA</u> Operations and Design Manager
2003	<u>University of Massachusetts at Lowell Nuclear Reactor</u> Reactor Operations and Systems Intern

PROJECT EXPERIENCE:

Mr. Denommee is a Principal of the company with seventeen years of experience in the design of mechanical building systems, plumbing systems, and nuclear systems operations for various size and types of projects including: Office, Institutional, Industrial, Educational, Hotel, Medical, Retail, Commercial, Military, Transportation/Airport, Housing, Municipal, and Federal Facilities. Design experience includes MGL Chapter 149 Public Bidding, Design Build and Selective Bid for Private Clients.

BLW ENGINEERS, INC.

311 Great Road, Post Office Box 1551, Littleton, Massachusetts 01460

CONSULTANTS

T: 978.486.4301 F: 978.428.0067



RWM Engineering, Inc.
P.O. Box 157, Boston MA 02121
Phone: (617) 708-0410 Fax: (617) 708-0541

RELEVANT PROJECT EXPERIENCE

Indigo Block Residences, Boston MA

Description: 6 story, 80 unit, 87,743 sf residential building.

Construction: 5 story wood frame over a steel podium level. First floor is slab on grade over conventional spread footing foundation

Status Under construction – Expected completion Summer 2021

Client Davis Square Architects

Stow Road, Harvard, MA

Description 2 – two story multi-unit residential buildings. Building A – 4000 sf, Building B 4,800 sf

Construction Conventional wood framed structure, slab on grade and spread footings.

Status Completed 2018

Client Davis Square Architects

Residences at Highland Avenue, Chelmsford, MA

Description Two story, 5,000 sf, multi-unit residential building.

Construction Conventional wood framed structure, slab on grade and spread footings.

Status Completed 2013

Client Davis Square Architects

719 Washington Street, Boston, MA

Description Three story, 12,900 sf, multi-unit residential building

Construction Conventional wood framed structure, slab on grade and spread footings.

Status Completed 2018

Client Piatt Associates Architects

RELEVANT PROJECTS

Gifford Street Housing – Phase I, Falmouth, MA

Description: 2 – two story multi-unit residential buildings. Building A – 4303 sf, Building B 2,984 sf

Construction: Conventional wood framed structure, slab on grade and spread footings.

Status Completed - 2020

Client Davis Square Architects

Hudson Senior Center, Hudson, MA

Description Two story 10,000 sf addition and renovations.

Construction Structural Steel and light gage metal framing, conventional spread footings

Status Completed 2011

Client Graham Meus Architects

Relevant Projects



Orient Heights, East Boston, MA

Nitsch Engineering is providing land surveying, civil engineering, transportation engineering, and structural engineering services for the redevelopment of Orient Heights, a Boston Housing Authority multi-family housing development consisting of 331 units in East Boston. Nitsch Engineering's services include performing existing conditions surveys; preparing ALTA plans and subdivisions plans; conducting feasibility studies and analysis of the existing site; performing site design services (grading, utilities, and layout design) and structural design of retaining walls; and performing traffic data collection and roadway geometry studies.

125 Armory Street Master Plan, Boston, MA

Nitsch Engineering provided civil engineering services for the redevelopment of approximately six acres into an integrated mixed-use neighborhood in Jackson Square of Boston, Massachusetts. Services provided consisted of the preparation of a Master Plan and the needed assistance for permitting with the Boston Planning and Development Agency. Nitsch Engineering worked closely with the Project Team in developing a Conceptual Site Plan to select strategies that aligned with the highest and best use for the proposed project.



Woodrow Wilson Court, Cambridge, MA

Nitsch Engineering provided civil engineering services for the renovation of Woodrow Wilson Court. Woodrow Wilson Court consists of 68 units on a 0.86-acre site. We evaluated existing conditions, provided recommendations to the Owner on required upgrades of the complex site's utilities (sewer, water, and drainage) and overall site conditions, produced construction drawings and specifications, and provided Construction Administration services and permitting coordination with the City of Cambridge Department of Public Works, Cambridge Water Department, and Massachusetts Water Resources Authority.

Washington Elms, Cambridge, MA

Nitsch Engineering provided civil engineering services for the renovation of Washington Elms, consisting of 15, three-story walk-up buildings containing 175 apartments. We evaluated existing conditions, provided recommendations to the Owner on required upgrades of the complex site's utilities (sewer, water, and drainage) and overall site conditions, produced construction drawings and specifications, and provided Construction Administration services and permitting coordination with the City of Cambridge Department of Public Works and Cambridge Water Department.



Washington-Beech Housing, Phases I and II, Boston, MA

Nitsch Engineering provided land surveying, civil engineering, and transportation engineering services for the redevelopment of this low- and moderate-income housing development that was originally built in 1952. The property was redeveloped in two phases: the first phase added 100 new units to the property and created three new streets, while the second phase added another 105 units and four streets. Nitsch Engineering designed the site utilities, grading, and layout for the improvements, including four townhouses, a midrise building, two new public streets, and one private way.

Washington-Beech Housing, Phase I and II

Boston, MA



Nitsch Engineering provided land surveying, civil engineering, and transportation engineering services for the redevelopment of this low- and moderate-income housing development that was originally built in 1952. The property was redeveloped in two phases: the first phase added 100 new units to the property and created three new streets, while the second phase added another 105 units and four streets. Because the project is on an AUL Contaminated Site, we worked closely with the project team to address AUL concerns during the design and permitting process.

In Phase I, Nitsch Engineering designed the site utilities, grading, and layout for the improvements, including four townhouses, a midrise building, two new public streets and one private way. We also permitted the improvements and additions with the Boston Public Works Department (BPWD), Boston Transportation Department (BTD), Boston Water and Sewer Commission (BWSC), Boston Street Lighting Division, Boston Parks Department, and private utility companies. We developed the specifications and cost estimates for the project. Nitsch Engineering provided construction administration services. Phase I was completed in Spring 2010.

For the Phase II improvements, Nitsch Engineering designed the site utilities, grading, and layout for the new units, as well as for the four new public streets. We permitted the improvements and additions with the BPWD, BTD, BWSC, Boston Street Lighting Division, Boston Parks Department, and private utility companies. We developed the specifications and cost estimates for the project. Nitsch Engineering also provided construction administration services for the Phase II improvements.



Project Features

- *Housing and streetscape redevelopment*
- *Permitting*
- *New public streets*

Client

ICON Architecture

Owner

Boston Housing Authority

Completion Date

Phase I - 2010

Phase II - 2013

Nitsch Engineering is providing land surveying, civil engineering, transportation engineering, and structural engineering services for the redevelopment of Orient Heights, a Boston Housing Authority multi-family housing development consisting of 331 units in East Boston. The housing development, originally built in 1951, will be replaced with 51 townhouses and mid-rise buildings. The 15-acre development will contain new public space, a community center, and management office. There will be a total of 318 vehicle and 388 bicycle parking spaces.

Nitsch Engineering's services include performing existing conditions surveys; preparing ALTA plans and subdivisions plans; conducting feasibility studies and analysis of the existing site; performing site design services (grading, utilities, and layout design) and structural design of retaining walls; and performing traffic data collection and roadway geometry studies.

Nitsch Engineering provided professional traffic engineering services related to the design and permitting of the Orient Heights redevelopment in accordance with the requirements of the Boston Planning and Development Agency (BPDA), Boston Transportation Department (BTD), the Public Works Department (PWD), and Public Improvement Commission (PIC).

Nitsch Engineering assisted the development team in the preparation of the Project Notification Form (PNF)/Draft Project Impact Report (DPIR) for BPDA review process under Article 80 Large Project Review of the Zoning Code by drafting the Transportation Chapter in accordance with the City's Transportation Access Plan Guidelines (2001) and the BPDA Development Review Guidelines (2006). This Chapter described roadway, pedestrian, and bicycle conditions; transportation issues; parking and loading conditions; pedestrian and bicycle circulation; proposed mitigation; and transportation goals for the Project.

Nitsch Engineering also prepared the Transportation Access Plan Agreement (TAPA), as required by the BTD, and the Construction Management Plan (CMP) in accordance with the current BTD requirements and in close coordination with the General Contractor.



Rendering courtesy of ICON Architecture

Project Features

- *Multi-family housing*
- *15-acre development*
- *Permitting with City of Boston*

Client

ICON Architecture

Owner

Boston Housing Authority

Completion Date

Phase I: 2018

Phase II: Ongoing

Nitsch Engineering is providing land surveying, civil engineering, and transportation engineering services for the redevelopment of the Worcester Common Outlets Mall, a one-million-square-foot mall on a 20-acre site, into a mixed-use development called CitySquare. The project will re-establish city streets, connect the site with City Hall and Union Station, and include 650 units of housing, 400,000-square-feet of street-level retail and entertainment, a 1,000-car underground parking garage, and around 1-million-square-feet of office space over four city blocks. This phased project is a prime example of smart growth and urban renewal, as it is in close proximity to public transportation and essential infrastructure, and focuses on reconnecting the urban heart of Worcester, the second largest City in New England.

Nitsch Engineering has designed roadway layouts for the new city streets that will be constructed on the structure deck of the mall, over the existing below-grade service loading docks and infrastructure systems. The below-grade structure will also be expanded with additional parking. We are designing the grading and utility infrastructure to serve the buildings and new municipal roadways. Nitsch Engineering's services included municipal site permitting and Massachusetts Department of Environmental Protection permitting.

CitySquare II included some unique project challenges:

- Constructing roads on the floor slab of the abandoned mall with existing garage below.
- Integrating roadway infrastructure – the storm drain, fire protection, power, and communications – with the garage.
- Reusing building demolition materials in accordance with MassDEP Beneficial Use Determination.
- Adapting development to economic/developer demand.
- Allowing flexibility for unknown tenant needs.
- Coordinating plumbing infrastructure for existing buildings.

Nitsch Engineering provided extensive utility compilation within the existing mall structure and in the adjacent roadways, performed a topographic and property line survey around the entire mall site, provided numerous ALTA/ACSM Land Title surveys for project financing, and prepared Eminent Domain Taking Plans for new street layouts to be conveyed to the City of Worcester. We will prepare subdivision and easement plans to conform to the new building sites that are being created.



Project Features

- *Urban renewal of second largest City in New England*
- *Redevelopment of a one-million-square-foot mall*
- *2.2 million square feet of mixed-use transit-oriented development*

Client

Arrowstreet, Inc.

Owner

Leggat McCall Properties, LLC

Completion Date

Ongoing



Years of Experience

- 17 in industry
- 17 at Nitsch Engineering

Registration

- Massachusetts: Professional Engineer (Civil) #46260, 2005
- Massachusetts: Soil Evaluator #13142, 2009
- Connecticut: Professional Engineer (Civil) #33310, 2018
- New Hampshire: Professional Engineer (Civil) #12824, 2009
- LEED Accredited Professional Building Design + Construction, 2008
- Certified Professional in Stormwater Quality, 2012
- OSHA (10-hour) Certified

Education

- B.S., Civil Engineering, Northeastern University, 2000
- ACEC/MA Emerging Leader Program, 2010

Chelsea has 17 years of experience in providing site development and transportation design for public and private clients. As a LEED Accredited Professional and Certified Professional in Stormwater Quality, she has an in-depth understanding of green building/site design practices and principles, which she applies on mixed-use, academic, commercial, and public facility projects throughout Massachusetts and New Hampshire. In addition, she is an experienced user of AutoCAD and HydroCAD software packages.

Representative Projects

Coppersmith Affordable Housing, East Boston, MA: Project Manager for civil engineering services for two new buildings in East Boston. Responsible for the site utility and stormwater management design for the project, as well as the site layout including parking, a driveway, and a pedestrian plaza. Also supporting project permitting through the Public Improvement Commission, Boston Water and Sewer Commission, and the Conservation Commission.

Parcel 25, Mission Hill, Boston, MA: Project Manager for civil engineering services for the design of a new multi-use building in Mission Hill. The development provides the neighborhood with retail, office space, and affordable housing units. Designed site utility improvements, stormwater management improvements, and layout and grading of the pedestrian plaza area and two parking lots; and assisted with permitting.

CitySquare II, Worcester, MA: Project Manager for civil engineering services for the redevelopment of a 20-acre site. The project will reestablish city streets in the area, and includes a multi-use development that will span four city blocks. Assisting in design of roadway layout and grading, as well as utility infrastructure to serve the buildings and municipal roadways, and providing municipal site review permitting and State Department of Environmental Protection permitting services.

Fan Pier, Boston, MA: Project Engineer for civil engineering services associated with the development of the 20.5-acres. Provided stormwater analysis for project site.

The Loop, Northborough, MA: Project Engineer for a peer review of a 566,000-square-foot residential and retail project near the intersection of Route 9 and Route 20 in Northborough. Providing construction observations for this project, including a weekly site visit to observe the condition of the site's erosion and sediment controls and the general progress of construction. Prepares field reports for the Town Boards, attends relevant Town Board meetings, and consults with the Town Engineer to coordinate services.

Columbus Center, Boston, MA: Project Engineer for civil engineering services for a multi-use housing development consisting of two high rises that contain a hotel, residential units, retail spaces, townhouses, and a parking garage. Provided design for site layout, grading, and stormwater management systems. An extensive rainwater collection and groundwater replenishment system was designed in order to preserve the delicate groundwater balance in the Back Bay/South End area.



*Boston Public Library, Johnson Building
Boston, MA*

Representative Projects - continued

Boston Public Library, Johnson Building, Boston, MA: Project Manager for civil engineering services for the renovation of the Johnson Building at the historic Boston Public Library (BPL) to better utilize the space, improve accessibility, and reinvigorate the library user experience. Designed site utilities and grading improvements, designed drainage improvements that include a trench drain or slot drain, and worked with the landscape architect to integrate porous pavement into the streetscape.

Worcester Trial Court, Worcester, MA: Project Engineer for civil engineering site improvement for a new \$115M courthouse in downtown Worcester. Responsibilities included providing layout and drainage design, assisting with the sewer connection permit, and providing construction administration services.

J. Michael Ruane Judicial Center, Salem, MA: Project Engineer for the 190,000-gross-square-foot building. The project was delivered under DCAM's CM-at-Risk procurement method and was divided in various procurement packages (e.g., relocation of the church and building foundation and utilities). Provided construction documents for water, sewer, and stormwater systems. Assisted with LEED documentation and permitting.



Worcester Trial Court, Worcester, MA

Springfield Public Safety Building, Springfield, MA: Project Manager for civil engineering services for the renovation of the Springfield Public Safety building. Site improvements impacted one acre of the three-acre site and included the installation of new fire services, improvements to pavement and stormwater management between the main building and the garage, improvements to building perimeter stormwater management, additional parking spaces on Elm Street, and construction of a ramp to the entrance on Elm Street. Provided construction administration services.

Boston Transportation Department Tow Lot and Facility, Boston, MA: Project Manager for civil engineering services for the Boston Transportation Department (BTD) tow lot and facility repairs. The lot is approximately 110,000 square feet and the facility is approximately 60,000 square feet. Designing the site layout, grading, stormwater management, and utilities (sewer, water, drainage). Providing permitting assistance preparing a Notice of Intent for United States Environmental Protection Agency (EPA) National Pollutant Discharge Elimination System (NPDES) permit for stormwater discharges from construction activities. Preparing a Stormwater Pollution Prevention Plan (SWPPP) for the site. Prepared a MassDOT Access permit for work affecting MassDOT infrastructure.





Charles D. Baker, Governor
Karyn E. Polito, Lieutenant Governor
Stephanie Pollack, MassDOT Secretary & CEO

massDOT
Massachusetts Department of Transportation

DBE Certification Office | MassUCP

March 12, 2020

Ms. Rebecca Bachand
RBLA Design, LLC
78 Greenlodge Street
Dedham, MA 02026-6223

This letter serves as sole and exclusive proof of your firm's DBE certification

Dear Ms. Bachand:

Congratulations! The Massachusetts Unified Certification Program (MassUCP), is pleased to notify you that we have renewed your company as a disadvantaged business enterprise (DBE). Your company continues to be assigned **NAICS Code(s) 541320** with the certified business description of **SITE PLANNING, LANDSCAPE ARCHITECTURE, DUE DILIGENCE RESEARCH, ENVIRONMENTAL PERMITTING SERVICES** and will remain listed in our certified business directory.

As a DBE, you must inform MassUCP in writing of any change in circumstances affecting your ability to meet size, disadvantaged status, ownership, control requirements or any material change in the information provided in your application form. Changes in management responsibility among members of a limited liability company are covered by this requirement. You must attach supporting documentation describing in detail the nature of such changes. The notice must take the form of an affidavit sworn to by the owners of the firm before a person who is authorized by state law to administer oaths or of an un-sworn declaration executed under penalty of perjury of the laws of the United States. You must provide the written notification within 30 days of the occurrence of the change. If you fail to make timely notification of such a change, you will be deemed to have failed to cooperate under 49 CFR 26.109(c).

To renew your firm's DBE certification and if it continues to meet the applicable criteria, on or before your firm's certification anniversary date of **April 13, 2021**, and each year thereafter, please send the MassUCP the following documents:

- (1) **No Change Affidavit (will be sent with reminder letter)**
- (2) **A signed copy of your company's, and all of its affiliates', U.S. Tax Returns including all schedules and attachments for the year(s) indicated.**
- (3) **A signed copy of your personal tax returns for year(s) indicated.**
- (4) **If a sole proprietor, a signed copy of your Schedule C for year(s) indicated.**
- (5) **A statement of the number only of full and part-time employees (including owner) for each year indicated.**

Ten Park Plaza, Suite 2600-B, Boston, MA 02116
Tel: 617-348-6656



THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
OPERATIONAL SERVICES DIVISION

One Ashburton Place, Suit 1017
Boston, MA 02108-1552

Charles D. Baker

Governor

Karyn E. Polito

Lieutenant Governor

Michael J. Heffernan

Secretary

Gary J. Lambert

Assistant Secretary for Operational Services Division

March 13, 2020

Ms. Rebecca Bachand
RBLA Design, LLC
78 Greenlodge Street
Dedham, MA 02026-6223

Dear Ms. Bachand:

Congratulations! Your firm has been renewed as a woman business enterprise (WBE) with the Supplier Diversity Office ('SDO') under the business description of **SITE PLANNING, LANDSCAPE ARCHITECTURE, DUE DILIGENCE RESEARCH, ENVIRONMENTAL PERMITTING SERVICES**. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification.** Your designation as a WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is April 13, 2023. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wsdo@state.ma.us.

Sincerely,



William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

Tel: (617) 720-3300
www.mass.gov/osd

TDD: (617) 727-2716
Follow us on Twitter: [@Mass OSD](https://twitter.com/MAss OSD)

Fax: (617) 727-4527

The Tyler

Type: Affordable Senior Housing,
Adaptive Re-use

Location: East Haven, CT

Completion Date: 2020

Client Contact:

The Architectural Team, Inc.
50 Commandant's Way at Admiral's Hill
Chelsea, MA 02150
Jeff Sargis
jsargis@architecturalteam.com
617.889.4402 x 185

Contractor Contact:

Keith Construction Inc.
3000 Davenport Avenue, Suite 300
Canton, MA 02021
Will Calder
781-828-8474
wc Calder@keithconstruction.net

Duration: 2020

Cost: \$260,000 installed landscape

RBLA worked with the The Architectural Team and WinnDevelopment on this award-winning adaptive re-use of an historic high school building. We designed an updated foundation plant palette tolerant of the shady conditions and narrow existing beds, along with a large hedgerow for screening adjacent properties. The key to this outdoor space is a large open courtyard behind the main school facade. Designed as a formal garden, this walking and dining space is visible from key areas of the residences and includes a grill station and ceremonial flag display, complete with robust perennial beds.



The Woods at Merrimack

Type: Senior Housing

Location: Methuen, MA

Completion Date: 2020

Client Contact:

JSA Architects Interiors Planners
273 Corporate Drive, Suite 100
Portsmouth, NH 03801

Dan Lamb
dlamb@jsainc.com
603.239.1262

Contractor Contact:

Dellbrook JKS
One Adams Place
859 Willard St.
Quincy, MA 02169
Patrick McNamara
pmcnamara@dellbrookjks.com
781.380.1675

Duration: 2018-2020

Cost: \$26M

Working with Buildable Sites' design team, RBLA prepared design and construction documents for this new senior living campus across from the Merrimack Golf Club in Methuen.

With 140 units in two buildings, the site is designed with a walking loop providing an accessible connection to all amenities. The main building's large outdoor dining area adjoins the interior dining room, and features a shade structure and fire pit, and views of the pickle ball court, community garden beds, putting green, and bocce court.

The entire campus benefits from a "borrowed landscape" with views of adjacent meadows and woodlands.



Sterling Lofts

Type: Affordable Senior Housing,
Adaptive Re-use

Location: Attleboro, MA

Completion Date: 2019

Client Contact:

The Architectural Team, Inc.
50 Commandant's Way at Admiral's Hill
Chelsea, MA 02150
Scott E. Maenpaa
smaenpaa@architecturalteam.com
617.889.4402 x145



Contractor Contact:

Keith Construction Inc.
3000 Davenport Avenue, Suite 300
Canton, MA 02021
Dave Denaro
781-828-8474
ddenaro@keithconstruction.net



Duration: 2017-2019

Cost: \$36M estimated

RBLA worked with The Architectural Team and WinnDevelopment to transform this historic jewelry factory in Attleboro, MA into a vibrant senior living community complete with walking trails with views to the river, seating areas, and shade gardens.



Turbines from within the building were refurbished for use in the site signage, and various pieces of equipment were reclaimed and located within the landscape as focal points conversation pieces.



Singletary Ave.

Type: Active Adult Community

Location: Sutton, MA

Completion Date: N/A

Client Contact:

Hawthorne Partners

Scott Cohen

617-877-0636

scohen@hawthornepartners.com

Contractor Contact:

(Unbuilt Work)

Duration: 2006-2009

Cost: \$30M Estimated

Just prior to the 2008-2009 downturn, Ms. Bachand worked with the team at Hawthorne Partners to design and permit this active adult community at the center of the Town of Sutton.

Due to it's location on a State Highway and anticipated land disturbance, the project was subject to MEPA review.

Working closely with the Town Planner to achieve their goals of additional senior units and improved Town infrastructure services, the team also worked with abutters to annex prime agricultural soil areas from the proposed project site to adjacent farms. This allowed the farms to meet 5-acre requirements.

As illustrated in the rendering above, nearly half the site was proposed to be maintained as forested wetland, with the two farm parcels annexed at the top left of the plan.



Comprehensive Permit Studies

Type: Affordable Multifamily

Location: Various MA communities

Completion Date: 2015

Client Contact:

Northland Residential Corporation
80 Beharrell Street, Suite E
Concord, MA 01742
Peter D. Crabtree
pcrabtree@northlandresidential.com
781.229.4706

Contractor Contact:

N/A

Duration: 2013-2015

Cost: N/A

The MA comprehensive permit process is a unique challenge and opportunity for developers of affordable housing. Ms. Bachand's worked with many teams on "40B" applications, several with Northland Residential.

Plans shown illustrate studies used by the developers to respond to a community's request for proposals, or for the public hearing process associated with the application.



St. Mark's School

Type: Educational, Residential

Location: Southborough, MA

Completion Date:

Client Contact:

Design Technique, Inc.

Lee Sollenberger

lee@deztek.com

603-494-7857

Contractor Contact:

Varies

Duration: 2007-2016

Cost: Varies

Ms. Bachand began working with the St. Mark's School School while at Geller Devellis/Stantec, and the relationship continues. Having designed and permitted three phases of on-site faculty housing, and received Conservation Commission permits for expanded athletic fields, RBLA worked with students and faculty to transform the Forbes Courtyard into an area for dining, play, and study, circumscribed by the pedestrian routes across campus.

In 2015, RBLA was part of the team for the STEM Building and associated landscape improvements, including a new sculpture garden which allows the facilities team to curate the artifacts stored throughout campus in one location.

In 2016, RBLA prepared studies for improvements to West Campus, a residential area separated from the main campus by Route 85.



Seven Springs

Type: Multifamily, Apartment and Condominium

Location: Burlington, MA

Completion Date: 2010

Client Contacts:

National Development
2310 Washington Street
Newton Lower Falls, MA 02462
Edward Marsteiner
EMarsteiner@natdev.com
(617) 527-9800

Northland Residential Corporation
80 Beharrell Street, Suite E
Concord, MA 01742
Peter D. Crabtree
p crabtree@northlandresidential.com
781.229.4706

Contractor Contacts:

Cranshaw Construction
Chris Iannelli, Principal
CIannelli@Cranshaw.com
(617) 965-7300

Duration: 2002-2011

Comprised of three residential living areas, Arborpoint, The Village, and The Reserve, Seven Springs was an active gravel pit when National Development began the process of rezoning the site for residential development. Ms. Bachand oversaw nearly a decade of design, permitting, and construction culminating in 425 units of apartments and condominiums on 69 acres surrounded by wetland. 10% of all units are maintained as affordable.



Walker Home & School

Type: Educational, Residential

Location: Needham, MA

Completion Date: 2003

Client Contact:

Walker Home & School
1968 Central Ave
Needham, MA 02492
781.449.4500



Contractor Contact:

Bowdoin Construction Corp.
220-1 Reservoir Street
Needham Heights, MA 02494
781.444.6302 Fax:



Duration: 2000-2003

While with Geller Associates, Ms. Bachand worked with the team at Walker Home and School to design and permit two new dormitory buildings to accommodate their students-in-residence. A resource center was also created, taking advantage of the existing wetland as an outdoor classroom amenity.



Residences at Fairmount Station

Type: Multifamily Residential, Transit-oriented Development

Location: Hyde Park, MA

Completion Date: 2019

Client Contact:

The Residences at
Fairmount Station LLC
50 Summer Street
Boston MA 02110
Dave Traggorth
dave@traggorthcompanies.com

Contractor Contact:

Delphi Construction
255 Bear Hill Rd
Waltham, MA 02451
781-893-9900
Larry McHugh
lmchugh@delphiconstruction.com

Duration: 2016-2019

Cost: \$12M estimated

Developed by The Traggorth Companies and SouthWest Boston Community Development Corporation and completed in 2018, the Residences at Fairmount Station is a transit oriented development (TOD) consisting of 27 mixed-income apartments, immediately adjacent to the Fairmount Avenue Station on the Fairmount Indigo commuter rail.

The development provides approximately 6,000 square feet of green space for residents to use, including this play area adjacent to - and visible from - the community room.



Amory Residences at Jackson Square

Type: Multifamily Residential

Location: 10 & 20 Amory Avenue and
89A – 97A Amory Street, Roxbury, MA

Completion Date: 2004

Client Contact:

Davis Square Architects
240A Elm Street
Somerville, MA 02144
Cliff Boehmer
617-628-5700

Contractor Contact:

GBH Macomber
One Design Center Place
Suite 600
Boston MA 02210-2327
GBH Macomber closed in 2007

Duration: 2002-2005

**with previous employer*

Cost: \$10.5M estimated



Photography Credit: Charles Mayer for Stantec

Davis Square Architect's design team for Urban Edge transformed a former tow lot and car wash at Jackson Square in Roxbury into sixty-four units of affordable rental housing in three buildings. Extensive work was done with Boston's Redevelopment Authority and the Department of Neighborhood Development, in addition to coordinating the Public Improvements Commission process involving Boston Water and Sewer, Transportation, and Public Works. A major emphasis was placed on the creation and maximization of pedestrian and family-friendly outdoor spaces for residents. A hardscape plaza with benches and tables was designed for neighborhood meetings and gatherings, and a new tot-lot was added for both resident children and the children of the surrounding neighborhood.

135 Lafayette St.

Type: Multifamily Residential, Mixed Use, Adaptive Re-use

Location: Salem, MA

Completion Date: 2014

Client Contact:

Samiotes Consultants Inc
20 A St
Framingham, MA 01701
508-877-6688
Stephen Garvin
SGarvin@samiotes.com

Contractor Contact:

Dellbrook | JKS
One Adams Place
859 Willard Street, Quincy, MA 02169
(781) 380-1675
Scott MacLeod
SMacLeod@dellbrookjks.com

Duration: 2011-2014

Cost: \$12M estimated

RBLA joined the Planning Office for Urban Affairs to shepherd this 76-unit project through construction documentation and installation.

A key feature was the creation of a central courtyard for community interaction utilizing components of the historic St. Joseph's Church. Granite block walls and large slab landings from the Church entry became seatwalls, benches, and pillars to provide visual interest and separation between the greenspace and parking lot and to create the cobbled sitting nook adjacent to the main residential entry. Native and drought tolerant plants accent outdoor spaces that integrate the neighboring residents and retail visitors.



Summer Street Condominiums

Type: 40B, Multifamily Residential, Mixed Use, Transit-oriented Development

Location: 10-12 Summer Street, Manchester-by-the-Sea, MA

Completion Date: 2003

Client Contact:

Davis Square Architects
240A Elm Street
Somerville, MA 02144
Cliff Boehmer
617-628-5700



Contractor Contact:

Landmark Structures Corporation
282 Montvale Ave
Woburn, MA 01801
(781) 376-1801
Bill Glasser, Founder
bill@landmarkstructures.com



Duration: 2001-2005
**with previous employer*

Cost: \$4.4M estimated

Image Source: Davis Square Architects

On two acres in the center of town, across the street from the commuter rail station traveling along the North Shore into Boston, the local housing authority pursued a smart growth project to provide a mixed-income, mixed-use infill development. Completed under Chapter 40B, this affordable housing development is one of the largest ever for Manchester-by-the-Sea.

The design team worked with the local Housing Authority to provide site design, permitting, and construction phase services for the affordable town homes and mixed-use building, and addressed neighbor and community concerns in order to successfully develop a primarily vacant and overgrown lot – formerly Horticultural Hall – into a flourishing affordable housing and retail core at the gateway to the village center.



Rebecca A. Bachand, RLA, ASLA, LEED AP

Owner, Manager

A registered landscape architect in Massachusetts, Connecticut, Rhode Island, and New Hampshire, Ms. Bachand has a broad design background that includes residential and healthcare design, campus master planning, corporate planning, and multi-family residential projects. She is involved with all phases of project development including local and state permitting; site planning, design, and detailing; and construction administration.

Ms. Bachand focuses on permitting and design of multi-family and assisted living residential projects throughout Eastern Massachusetts. Through her student and professional work, Ms. Bachand has focused on Therapeutic Landscape Design, as well as the related area of Universal Accessibility. She designs residential projects incorporating facets of these topics into spaces for use by all generations and abilities and has worked with The Northbridge Companies and LCB Senior Living on several assisted living and dementia care residences in Boston's suburbs.

Ms. Bachand assisted the CICD POUA AFL-CIO team developing the Cote Ford Site in the Mattapan neighborhood of Boston with the Boston Redevelopment Authority's Article 80 Review process. Beginning construction in 2019, this site will feature a mix of apartment-style and townhome units and rooftop and ground level outdoor gathering spaces convenient to the MBTA service. She also completed construction documents for the Residences at Fairmount Station, a new transit-oriented housing project located in Hyde Park sponsored by the Traggorth Companies and the Southwest Boston Community Development Corporation, as well as Madison Park's 2451 Washington Street development in Roxbury, MA, and Hearth at Four Corners, located in Dorchester. She recently completed the community design phase of the Odom Serenity Garden, Dorchester for Boston Parks in conjunction with the Boston Department of Neighborhood Development / POUA CICD proposal for Morton Street Village, Mattapan.

Registrations & Certifications

Registered Landscape Architect: #1405, State of Connecticut, 2016; #636, State of Rhode Island, 2016; #136, State of New Hampshire, 2015; #1368, Commonwealth of Massachusetts, 2003

CLARB Certified Landscape Architect, 2014

House Doctor Light Certification, MA Department of Housing and Community Development (DHCD), 2013

LEED Accredited Professional, #83775, Green Building Certification Institute (GBCI), 2006

Women-Owned Business: Commonwealth of Massachusetts, 2017, State of Rhode Island, 2020

Disadvantaged Business, 2017

Education

USGBC LEED New Construction v2.2 Technical Program, 2006

Bachelor of Science Landscape Architecture, University of Massachusetts, Amherst, Massachusetts, 1998

Previous Employment

2000 – 2010

Stantec Consulting, Inc. / Geller DeVellis, Inc. / Geller Associates, Inc.

Wellesley and Boston, MA

(Stantec acquired Geller DeVellis, Inc. in May 2007; Geller Associates merged with DeVellis Associates ~2001)

Project Landscape Architect, Project Manager, Associate

Professional Associations

Newton Needham Regional Chamber of Commerce, Member

Commercial Real Estate Women Network (CREWBoston, formerly NEWiRE), Member, Board of Directors 2015-2018

American Society of Landscape Architects, Boston Society of Landscape Architects, Member

Rebecca A. Bachand, RLA, ASLA, LEED AP

Redevelopment of the Fairfax Gardens Public Housing Site

Bristol Commons and Lenox Green: Passive House Inspired Affordable Housing

Location: Taunton, MA • **Units:** 160 Total (98 townhomes, 8 duplexes, and 54 apartment units) • **Total Development Cost:** \$73 million • **Construction Completed:** Spring 2014
Affordability: 0-60% AMI rental units • Developed by Trinity Financial in conjunction with the Taunton Housing Authority • Managed by Trinity Financial



PROJECT BACKGROUND

Fairfax Gardens, built in 1951, was an isolated, 150-unit barracks-style public housing development in the middle of a low-density, single-family neighborhood in Taunton, MA. Due to limited operational resources over the years, the development's infrastructure, utilities, and many building components were in poor condition and in need of complete replacement.



The buildings were neither energy efficient nor accessible, the units were cramped and much smaller than current space standards dictate, and mold, pests, and deteriorated finishes were problems throughout. The distressed conditions at Fairfax Gardens not only negatively impacted residents' health and quality of life, it also brought down the property values of nearby homes.

The award of the HOPE VI grant allowed for the complete demolition and reconstruction of the Fairfax Gardens property (formally renamed Lenox Green post construction), as well as the development of a vacant, transit-oriented parcel in downtown Taunton (Bristol Commons).

Achieving high levels of energy efficiency was a priority of the project from the start, and a team of professionals skilled at high performance housing design and construction was assembled to achieve that goal. Passive design philosophies, such as super insulation and airtight construction of the building envelope and very high efficiency mechanical and ventilation systems, were employed to achieve buildings that would consume approximately 1/10th of the heating energy of conventional construction. Simplicity of operations and maintenance, affordability, constructability at scale, dependability, and low utility expenses were balanced with the goal of deep energy use reductions.

GREEN CERTIFICATIONS
Enterprise Green
Communities and
Energy Star Homes



As a condition of the HOPE VI redevelopment grant, the sites were also designed and built to meet the requirements of the Enterprise Green Communities standard, which comprehensively addresses sustainability throughout the development with a focus that extends beyond energy efficiency into water conservation, environmental impacts, resident health, and sustainable materials, and efficient operation and maintenance.

Funding Sources

- \$22 Million HOPE VI Revitalization Grant from the US Department of Housing and Urban Development (HUD)
- LIHTC Funding from the Massachusetts Department of Housing and Community Development
- Other public funding sources and private equity

DESIGN APPROACH

1. Super insulated, air sealed exterior wall and roof construction
2. High performance windows
3. Heat recovery ventilation systems
4. High efficiency heating and cooling equipment (air source heat pump and valance radiant heating/cooling technology)
5. "Solar Ready" design for further reductions through integration of solar thermal or photovoltaic technology.

PERFORMANCE RESULTS

New Ecology, Inc. has been tracking and benchmarking the performance of this development for the past four years to understand the energy impact of the revitalization. The results below affirm the potential for passive approaches to achieve deep reductions in energy use in affordable housing.

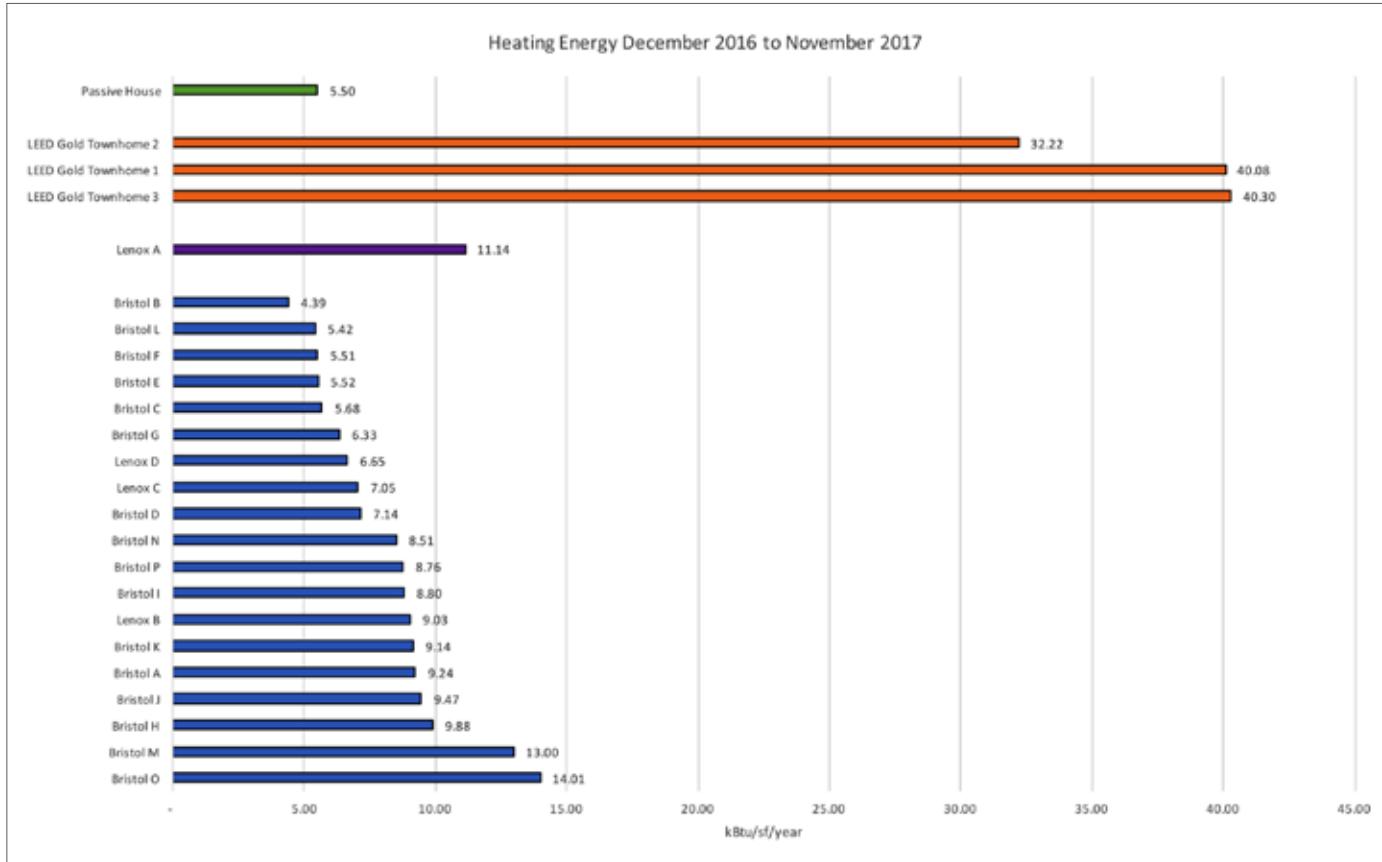
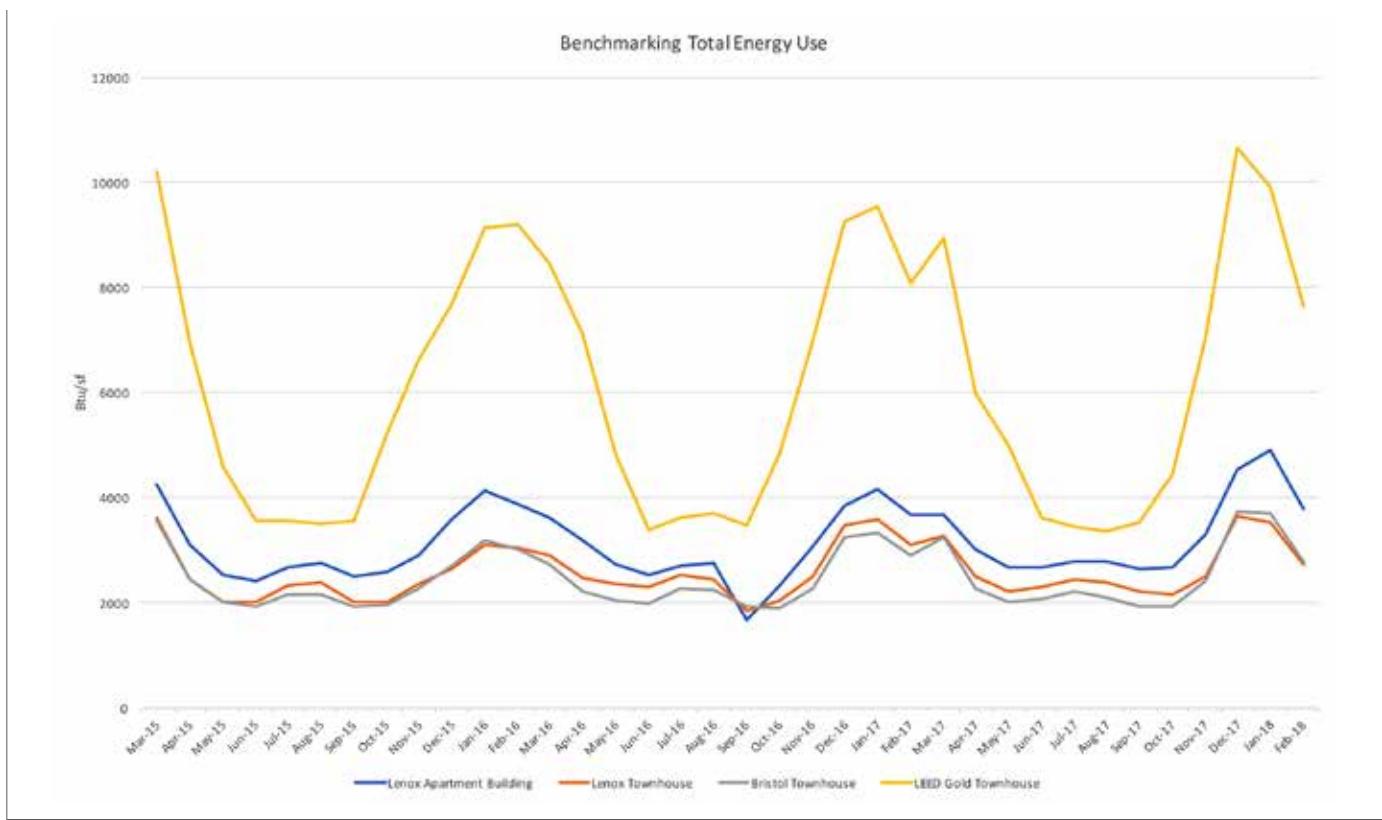
AIR INFILTRATION RESULTS

AIR INFILTRATION (ACH50 ¹)	
PASSIVE METRIC	0.6 ²
CURRENT ENERGY CODE: IECC 2015 ³	3
BRISTOL COMMONS & LENOX GREEN	Best = 0.52 Average = 0.84

¹ACH50 = air changes per hour at 50 pascals.

²This metric is chosen by the Passive House Institute of the United States for the PHIUS+ rating system.

³IECC = International Energy Conservation Code



*U.S. Department of Energy
Better Buildings Challenge
SHOWCASE PROJECT*

The Anne M. Lynch Homes at Old Colony

PROJECT BACKGROUND

Built in 1940, the Old Colony public housing development in South Boston was the Boston Housing Authority's (BHA) largest property, and one of the most distressed with aging infrastructure and high energy consumption. After years of collaboration with residents, BHA hired Beacon Communities to redevelop the site. Beacon and BHA redeveloped the property into The Anne M. Lynch Homes at Old Colony, which provides deeply affordable housing in extremely energy-efficient buildings. Beacon has a long-term ground lease from BHA and operates the property as part of a public-private partnership with BHA.

The Joseph M. Tierney Learning Center



The Anne M. Lynch Homes at Old Colony property was redeveloped according to a neighborhood master plan that eliminates the superblock-style isolation of the old public housing development, while emphasizing the site's connectivity to neighboring streets, downtown Boston, and adjacent parks along the Boston waterfront. Phase One of the redevelopment included construction of 116 homes and was completed in December 2011. This was followed by an additional 129 homes constructed during Phase Two, which was completed in early 2014. Finally, Beacon constructed the 10,000-square-foot Joseph M. Tierney Learning Center on-site, which partners with neighborhood-based service providers in the Boston community to provide youth-based programming.

The sustainability efforts at The Anne M. Lynch Homes at Old Colony received a number of certifications, including LEED for Neighborhood Development (Gold), LEED BD & C (Community Building—Gold), LEED for Homes/Midrise (Platinum), and ENERGY STAR® Homes. The project was designed according to Enterprise Green Communities standards.

Solutions

New Ecology was the Green Building consultant on this redevelopment project and was involved in every aspect of greening. The redevelopment of The Anne M. Lynch Homes at Old Colony was designed to achieve a high level of energy and water efficiency and reduce energy costs for Beacon and its residents. Throughout the project, quality construction practices were followed to increase building durability, improve indoor air quality, and create a well-sealed and highly-insulated building envelope, which maximizes energy efficiency. High-efficiency heating and cooling systems, heat recovery ventilation, ENERGY STAR® windows and appliances (refrigerators, dishwashers, and washing machines), and WaterSense-certified ultra-low-flow water fixtures were installed throughout the Anne M. Lynch Homes at Old Colony in order to maximize efficiency and comfort for the residents.

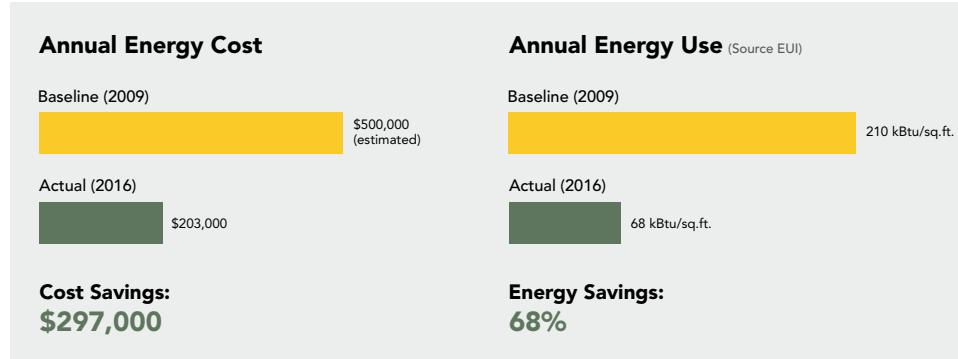
SECTOR TYPE
Multifamily

LOCATION
Boston, Massachusetts

PROJECT SIZE
140,000 Square Feet



All phases of the redevelopment used sustainable materials, including low-VOC paints, adhesives, and sealants. The project utilized recycled and locally-sourced materials, and followed strict waste diversion guidelines, further mitigating the environmental impact of the project. The last phase of the project also involved installing solar panels and purchasing renewable energy credits.



OTHER BENEFITS

Research conducted by the Harvard School of Public Health found that the redevelopment of The Anne M. Lynch Homes at Old Colony significantly reduced indoor air pollutants and improved residents' health. Compared to conditions in Old Colony before the redevelopment, the research found:

- 57% reduction in particulate matter
- 65% reduction in NO₂
- 93% reduction in nicotine levels



[*] Colton et. al. (2014). Indoor Air Quality Vs Conventional Multifamily Low-Income Housing. *Environmental Science & Technology*, 48, 7833-7841.

[**] Colton et. al. (2015). Health Benefits of Green Public Housing: Associations With Asthma Morbidity and Building-Related Symptoms. *American Journal of Public Health*, 105(12), 2482-2489.

In addition, residents reported:

- Fewer instances of other pollutants, such as mold and pests*
- 47% drop in sick building syndrome symptoms
- Substantial reductions in asthma-related issues in children, including:
 - 31% decrease in asthma attacks
 - 24% fewer asthma-related hospital visits
 - 21% fewer missed school days**

For more information on the U.S. Department of Energy's challenge, visit: betterbuildingsinitiative.energy.gov/challenge. View the showcase project on the BBC website at: betterbuildingssolutioncenter.energy.gov/showcase-projects/homes-at-old-colony_0

NEW ECOLOGY

Orient Heights

Location: East Boston, MA • *Units:* 331 (in construction)

Owner: Boston Housing Authority • *Manager:* Trinity Financial

PROJECT BACKGROUND

Orient Heights is a redevelopment of a state-funded public housing development located in East Boston. Orient Heights was last renovated in the 1990s, and was showing its age. In 2015, the Boston Housing Authority (BHA) began planning to demolish the outdated buildings and existing 331 units, directly replacing them with 331 newly constructed units. Trinity Financial has a long-term ground lease from BHA and operates the property as part of a public-private partnership with BHA. New Ecology was contracted by Trinity Financial to provide green technical assistance and integrated design advice throughout the process. This included schematic design, lifecycle analysis, energy and water use and cost projections, design development, construction administration, project close-out and green building certification, and building energy and water performance review post-occupancy. Phase 1 of renovations was completed in March 2018, and Phase 2 has begun.



Solutions and Services

GREEN CERTIFICATIONS

- LEED for Homes v2008 Certifiable
- LEED for Homes Midrise v2010 Platinum
- Enterprise Green Communities 2015
- Energy Star Homes certified

Five new buildings providing a combined 120 units were built in Phase 1: one 4-story midrise and four 8-unit townhome-style buildings. Energy efficiency measures include:

- A high-performance building envelope with air-tightness insulation and air sealing to prevent unwanted heat loss and outside air infiltration.
- Highly efficient windows - installed for the same cost as typical Energy Star windows.
- Temperature in the townhomes is regulated by mini-split heat pumps, allowing for individual climate control by the residents within the units by residents.
- A central VRF heat pump provides space conditioning in the midrise, heating and cooling the building efficiently and effectively. Incentives for the VRF system provided by the Mass Clean Energy Center.
- Energy recovery ventilators (ERVs) were installed to provide fresh air ventilation and energy efficiency while maintaining comfortable indoor heat and humidity levels.
- EPA WaterSense water fixtures and Energy Star lighting and appliances were used throughout the development to maintain low water and energy usage.
- Bicycle racks for both visitors and residents were installed to encourage alternate transportation and healthy residents.

In addition to the consulting work done with the construction and design, **NEI also coordinated and advised on LEED, Energy Star, and Enterprise Green Communities certifications and document submissions, ensured compliance with regulations, and provided rater services to validate certification.** NEI also coordinated the MassSave Multifamily High Rise and Low Rise utility rebates for this project.



To ensure maintenance of efficiency post-occupancy, NEI reviewed and provided input on comprehensive Maintenance and Operations manuals for both the townhomes and the midrise. In addition, NEI created a Green Living Guide for the new tenants that included information about the green features of their unit as well as the building at large.

NEI continues to provide sustainability and resiliency consultation for Trinity Financial as they move onto subsequent phases in the redevelopment. The Orients Heights project will be providing a total of 331 units of green, comfortable, and contemporary affordable housing by 2024.

LAUREN A. BAUMANN, LEED AP, CPHC

New Ecology, Inc.

15 Court Square, Suite 420, Boston, MA 02108

baumann@newecology.org 617-557-1700 x7023



SUMMARY

Ms. Baumann joined New Ecology, Inc. in 2005. She has fifteen years' experience providing technical assistance for clients developing and rehabilitating green affordable housing, educational and cultural facilities, community centers, day-care and health care facilities. At NEI she serves as Vice President. During her time at NEI she has provided technical assistance to "green" thousands of units of affordable housing in the Boston Metro area and beyond, including Energy Star, Enterprise Green Communities, LEED, and Passive House certifications. Working with NEI's clients she has raised millions of dollars in grant and rebate funds to support energy efficiency, renewable energy and other green features. She is a Senior Fellow in the New England Region Environmental Leadership Program. Ms. Baumann holds a degree in Biology from Cornell and a Masters in Urban and Environmental Policy and Planning from Tufts.

EXPERIENCE

New Ecology, Inc.

Boston, MA

June 2005-Present

Vice President, Senior Associate, Associate

Vice President of an innovative environmental organization that serves as a catalyst for community-based sustainable development projects.

- Trains and supervises a team of project managers to provide technical assistance on the design, construction, retrofit, and operation of high performance affordable housing and community buildings
- Advances a climate change resilience practice with state and local government agencies and owners of multifamily housing portfolios in Massachusetts and New York
- Assists with budgeting, strategic planning, staff and board management, and growth and expansion across the organization
- Specializes in the implementation of the green integrated design process; specifically, charrette facilitation, project team coordination, contractor/sub-contractor training, and resident education
- Facilitates coordination with governmental agencies, utilities and utility program administrators, and other related organizations and has raised millions of dollars in grant and rebate funds to support efficiency, greening, and renewable energy features on projects
- Coordinates project certifications through EPA Energy Star Homes, various USGBC LEED rating systems, and Enterprise Green Communities
- Presents on the practical implementation of green affordable housing at various conferences and forums

Estee Lauder

Melville, NY

June 2003-August 2004

Junior Chemist

- Formulated skin care products to meet marketing, regulatory, and patent guidelines
- Performed formula modification, batch production, and stability and safety testing
- Initiated water filter recycling at division-wide level and paper recycling within lab

LAUREN A. BAUMANN, LEED AP, CPHC

California Public Interest Research Group

Berkeley, CA

Fall 2002

UC Berkeley Campus Organizer

- Coordinated campaigns for non-profit student organization that addressed environmental, democratic, and social justice issues
- Recruited student volunteers and interns, executed grassroots fundraising and taught intern class

EDUCATION AND TRAINING

Tufts University, Medford, MA

2006

Master of Arts in Urban and Environmental Policy and Planning

Cornell University, Ithaca, NY

2002

Bachelor of Science in Biology, Ecology concentration

CERTIFICATIONS

US Green Building Council – LEED Accredited Professional: Building Design and Construction and Homes

Passive House Institute U.S. (PHIUS) – Passive House Certified Consultant (NaCPHC)

AWARDS AND AFFILIATIONS

Wild Gift – Recipient, Alumni Board Member, Alumni Council Member

Environmental Leadership Program - New England Regional Network – Fellow

ASHLEY WISSE, EIT, CEM, CPHC, LEED AP, Green Rater
New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
wisse@newecology.org 617-557-1700 x7043



SUMMARY

Ms. Wisse joined New Ecology, Inc. (NEI) in 2012. At NEI, she manages the greening of new construction and renovation projects, primarily in multi-family affordable housing. Ms. Wisse provides technical assistance to meet certification criteria for green building programs including numerous LEED rating systems, Enterprise Green Communities, and Energy Star; as well as securing applicable utility rebates for project owners and developers. Ms. Wisse also continues to research new technology and equipment to improve the intersection of construction and sustainability. During the 2016-2017 school year, Ms. Wisse also taught undergraduate courses in the Construction Management Department at the Wentworth Institute of Technology, located in Boston, MA. Ms. Wisse holds a Bachelor of Science degree in Civil Engineering from Syracuse University and a Master of Science degree in Architectural Engineering from The Pennsylvania State University.

EXPERIENCE

New Ecology, Inc. Boston, MA October 2012–Present

Senior Project Manager, Project Manager

Sustainability technical assistance consultant for high-performance, green affordable housing.

- LEED Accredited Professional and Green Rater
- Enterprise Green Communities, Energy Star Homes, and utility rebate coordination
- Integration of renewable and alternative energy
- Design assistance and construction oversight of sustainable, energy efficient, and high-performance new construction and major renovation

Wentworth Institute of Technology Boston, MA September 2016 – May 2017

Assistant Professor

- Assistant Professor in the department of construction management, courses taught include: Construction Graphics and Revit Modeling – lab and lecture, Materials Testing and Quality Control – lab and lecture, and Construction Surveying – lab and lecture.

Wiss, Janney, Elstner Associates, Inc Boston, MA November 2010–September 2012

Architectural Engineer

- Team Coordinator & Manager of Test Preparation and Execution for ASHRAE Whole-Building Air Tightness Testing
- Document Control & Construction Activity Observation of building upgrades and repairs
- Exterior envelope commissioning and peer review.
- Owner's representative for OPR compliance and local code requirements
- General research, proposal writing, budget estimation, site visit reporting, testing reports, creation and investigation of inspection openings, and infrared verification

ASHLEY WISSE, EIT, CEM, LEED AP, Green Rater

The Pennsylvania State University

University Park, PA

August 2008–August 2010

Graduate Research Assistant

- Researcher – Interviewed construction/design stakeholders and observed internal processes related ongoing construction; developed implementation strategies for campus-wide sustainable design goals and lean execution
- Co-researcher – Collaboration between the Green Building Alliance, Burt Hill, Inc., and the Lean & Green Research Initiative to understand phasing, decision-making, and key players within typical building projects to improve, lean, and increase sustainability within existing processes
- Residential Home Auditor – student teams visited volunteer area residents to review existing energy usage and provide possible improvements through long-and short-term investment strategies

EDUCATION AND TRAINING

The Pennsylvania State University, College of Engineering, State College, PA
Master of Science – Architectural Engineering

2010

Syracuse University, L.C. Smith College of Engineering and Computer Science, Syracuse, NY
Bachelor of Science – Civil Engineering

2008

CERTIFICATIONS

Association of Energy Engineers – Certified Energy Manager

National Council of Examiners for Engineering and Surveying (NCEES) – Engineer in Training (EIT)

Passive House Institute of the United States (PHIUS) – Certified Passive House Consultant (CPHC).

United States Department of Labor and Training, Occupational Safety and Health Administration –
Ten hour Certified

United States Green Building Council – LEED Accredited Professional (AP) in the following rating systems: Building Design and Construction, Neighborhood Development, Interior Design and Construction, and Homes/Homes Midrise as well as Green Rater for LEED for Homes and Homes Midrise.

TECHNICAL PROFICIENCIES

AutoCAD Architecture, AutoCAD Revit, Google Sketch-Up, Wärme Und Feuchte Imitational (WUFI) Modeling, THERM Modeling, and PHIUS Modeling

PROFESSIONAL ASSOCIATIONS

ASHRAE – Member

Association of Energy Engineers (AEE) – Member

PHIUS – Member

USGBC - Member

CANstruction – Industry Mentor to Northeastern University team, 2011 and 2012

North East Sustainable Energy Association – Member

Young Professionals in Affordable Housing – Member

PUBLICATIONS

Thesis: Process-Based Policy Development for Sustainable Implementation on Pennsylvania State University Renewal Projects

WATARU MATSUYASU

✉ wmatsuyasu@kleinhornig.com
☎ 617.224.0622

PRACTICE AREAS

- Real Estate
- Housing Development
- LIHTC Investments
- Co-Ops and Condos
- Lending
- Nonprofit Organizations
- Housing Preservation
- Mixed-Use Development
- MGL 40T Preservation Transactions
- Tenant Purchases / Cooperatives
- General Corporate



EDUCATION

Georgetown University Law Center, JD, 2000

Yale University, BA, 1993

EXPERIENCE

Wataru (Wat) Matsuyasu's practice focuses on real estate, affordable housing, and community development transactions. He has worked with nonprofit and for-profit developers in the acquisition, development and (re)financing of a number of affordable housing and community development projects in Massachusetts. He has also represented a national syndicator in a series of Low-Income Housing Tax Credit transactions around the country. His real estate experience includes real property purchase and sale transactions, zoning and permitting matters, conveyancing, title insurance, leasing, condominiums, and contracting for design and construction services.

Prior to joining Klein Hornig, Wat worked as an associate at DLA Piper and Goulston & Storrs, P.C. in Boston, MA, Baker & Daniels LLP in Indianapolis, IN, and as a project manager with Preservation of Affordable Housing, Inc. (POAH) in Boston, MA.

BAR ADMISSIONS

- Massachusetts
- Indiana (inactive)

TRANSACTIONS

- Represents a national syndicator in numerous Low-Income Housing Tax Credit transactions
- Represents a national tax credit investor in numerous asset management transactions
- Represented a national nonprofit developer in the acquisition, selective demolition, new construction and redevelopment of 173 affordable rental units, along with associated infrastructure development by the City of New Bedford
- Represented a Massachusetts community development corporation in the acquisition of a former mill building complex, subdivision and establishment of a master condominium, and financing of 60 units of affordable rental housing with Low-Income Housing Tax Credits and Historic Rehabilitation Tax Credits
- Represented a community health center in the financing and redevelopment of a former mill building complex, involving formation of a condominium, master lease and sublease, and New Markets Tax Credit and Historic Tax Credit financing
- Represented a Massachusetts community development corporation in the acquisition and preservation (facilitated pursuant to MCL Chapter 40T) of a 32-unit affordable rental housing development
- Represented a local YWCA agency in the financing and rehabilitation of a 103-unit SRO project, involving ground lease and sublease, restructuring of existing debt, and new debt and Historic Tax Credit equity financing
- Represented a Massachusetts community development corporation in the acquisition, development and financing of a three-phase affordable rental housing project, involving the establishment of multiple condominiums and cross-easements
- Represented a local settlement house in the acquisition, redevelopment and Historic Tax Credit financing of a building expanding the agency's services and programming
- Represented a Massachusetts nonprofit developer and operator of affordable SRO units in a series of financing transactions
- Represented a national nonprofit developer in a 140-unit project in Massachusetts involving a ground lease and sublease, refinancing and restructuring of the existing debt, and new debt and equity financing
- Represented a Massachusetts community development corporation in the acquisition, development and financing of 20 affordable homeownership units
- Represented a Massachusetts community development corporation in the acquisition of a former church building and the redevelopment and financing of 34 affordable rental units
- Represented a joint venture of a local nonprofit and national nonprofit developer in the acquisition and refinancing of an 80-unit senior project in Massachusetts

ACTIVITIES

- American Bar Association, *Member*
- Boston Bar Association, *Member*
- The Haley House, Boston, MA, *Board of Trustees* (2007-present)
- Lawyers Clearinghouse on Affordable Housing and Homelessness, *Pro Bono Participant* (2011-present)
- United Way of Massachusetts Bay and Merrimack Valley, Affordable Housing Review Panel (2014)

EVENTS

- Presentation on legal structuring issues to competition participants, Federal Home Loan Bank of Boston (FHLBB), 2012 Affordable Housing Competition – 2012

A. ROSS PINI

✉ rpini@kleinhornig.com
☎ 617.224.0623



PRACTICE AREAS

- Low Income Housing Tax Credits
- Historic Rehabilitation Tax Credits
- New Markets Tax Credits
- Housing Development
- Housing Preservation

EDUCATION

Boston College Law School, JD, 2015

The College of William and Mary, BA, 2012, *summa cum laude*

EXPERIENCE

Ross Pini focuses his practice on a wide range of affordable housing and community development matters, and regularly represents nonprofit and for-profit developers in complex transactions involving federal and state Low Income Housing Tax Credits, federal and state Historic Tax Credits, New Markets Tax Credits and tax exempt bond financing. Ross also frequently advises nonprofit organizations on a variety of corporate governance matters.

Ross became involved in affordable housing and community development while at Boston College Law School, where he was a member of the Community Enterprise Clinic, Community Economic Development Law Group, and Boston College's chapter of Project No One Leaves, a foreclosure prevention task force in Greater Boston. He also interned with the Harvard Legal Aid Bureau's Foreclosure Defense Task Force and Judge Alexander Sands of the Massachusetts Land Court.

BAR ADMISSIONS

- Massachusetts
- Rhode Island

TRANSACTIONS

- Represents multiple nonprofit and for-profit developers in transactions involving federal and state Low Income Housing Tax Credits, project-based vouchers and various public and private debt sources.

- Represented nonprofit health center QALICB in connection with the financing and development of a community health center involving New Markets Tax Credit and state Historic Tax Credits.
- Represented joint venture of two nonprofit developers in the syndication of a single room occupancy project involving federal and state Low Income Housing Tax Credits and Historic Tax Credits.
- Represented nonprofit developer in connection with a scattered-site project utilizing tax-exempt bond financing.
- Represented nonprofit and for-profit developers in connection with the financing and development of affordable homeownership projects utilizing public and private debt sources.
- Represented individual investors in multiple transactions involving federal and state Historic Tax Credits.
- Represents state tax credit lender in various loans of state tax credit proceeds.

ACTIVITIES

- Boston Bar Association, *Member*

STEPHANIE N. JOHNSON

✉ sjohnson@kleinhornig.com
☎ 617.224.0642



PRACTICE AREAS

- Affordable Housing
- Real Estate
- Low Income Housing Tax Credits
- Non-Profit Governance

EDUCATION

Boston College Law School, JD, 2019, *cum laude*

Tufts University, MA, 2018

Brandeis University, BA, 2013, *cum laude*

EXPERIENCE

Stephanie Johnson joined Klein Hornig in September 2019 after having spent the previous two summers as a law clerk in the firm's Boston and Washington offices. Stephanie focuses her practice on a wide range of affordable housing and community development matters, with particular emphasis on tax credits and mixed-finance public housing.

Stephanie earned a dual J.D. from Boston College Law School and M.A. in Urban Planning and Environmental Policy from Tufts University. During law school, Stephanie was an Articles Editor for the Boston College Law Review and a 3:03 Certified Student Attorney for the Civil Litigation Clinic where she worked on a range of housing law cases. While in law school, Stephanie was awarded three prestigious scholarships: the Massachusetts Black Lawyers Association (MBLA) Honorable Reginald Lindsay Public Service Award, the MBLA's Fletcher "Flash" Wiley Legacy Scholarship Award, and Boston College Law School's Philip Joseph Privitera '95 Commencement Award.

Earlier in her career, Stephanie was a housing intern at the City of Medford, where she focused on maintaining and preserving Medford's affordable housing stock, including compliance with HOME and/or LIHTC standards. In 2016 she was awarded the prestigious Boston College Law School Rappaport Center for Law and Policy Fellowship, under the auspices of which she interned at the Boston Redevelopment Authority. She also has experience working at the Executive Office of the Mayor (EOM) in Washington, DC, the U.S. Department of Housing and Urban Development as a Segal Fellow, and for a member of the Massachusetts House of Representatives.

BAR ADMISSIONS

- Massachusetts

TRANSACTIONS

- Represented a national nonprofit developer in the acquisition and redevelopment of a mixed income affordable housing complex involving Low-Income Tax Credits, and state and local funds in Boston, Massachusetts.
- Represented a local nonprofit joint venture team in connection with a new construction project that redeveloped a vacant school building into a 40- unit apartment building for low income seniors in Taunton, Massachusetts.
- Represented a tenant association in connection with their refinancing and redevelopment of its 500 unit mixed-use residential and commercial property using the HUD 223(f) program.
- Represented a local nonprofit developer with a multi-phase development of a long vacant parcel of formerly MBTA owned land in Roxbury neighborhood of Boston, MA involving Low-Income Tax Credits, and state and local funds.
- Represented a community development corporation in the new construction of a mixed income affordable housing complex involving federal and state Low-Income Tax Credits, and state and local funds in Medway, MA.
- Represented a local nonprofit developer in a transaction involving the installation of solar panels on a portfolio of multifamily apartment buildings.

ACTIVITIES

- American Bar Association, *Member*
- American Bar Associate Forum on Affordable Housing and Community Development, *Member*

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