

NEWTON ARMORY REDEVELOPMENT

DEPARTMENT OF PLANNING AND DEVELOPMENT

SEPTEMBER 30, 2021

REQUEST FOR PROPOSALS #21-79



DAVIS
SQUARE
ARCHITECTS

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1



Development Team

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

DEVELOPMENT TEAM NARRATIVE

Metro West Collaborative Development (“Metro West CD”) and Civico Development, LLC (“Civico”) are pleased to present this proposal for the redevelopment of the West Newton Armory (the “Armory”) in the hopes of becoming your partner in:

- Creating 43 units of affordable housing for low-income families
- Evolving the design in partnership with local boards and committees
- Seeking financing and permitting approvals for the project
- Long-term stewardship of this important community asset

Metro West CD and Civico are committed to the long-term vitality of Newton. This proposed project advances our commitment to high-quality, accessible housing that improves the lives of low- and moderate-income households in Newton.

Our development team brings an exceptional level of experience and applicable expertise to the Armory redevelopment.

Metro West Collaborative Development, founded in 1991, is a regional community development corporation serving 22 towns in Greater Boston. Metro West CD supports affordable housing advocates by meeting regularly with Housing Partnerships and Trusts, non-profit organizations, municipal planning and housing staff, and community leaders to identify potential housing development opportunities, programs, and policies

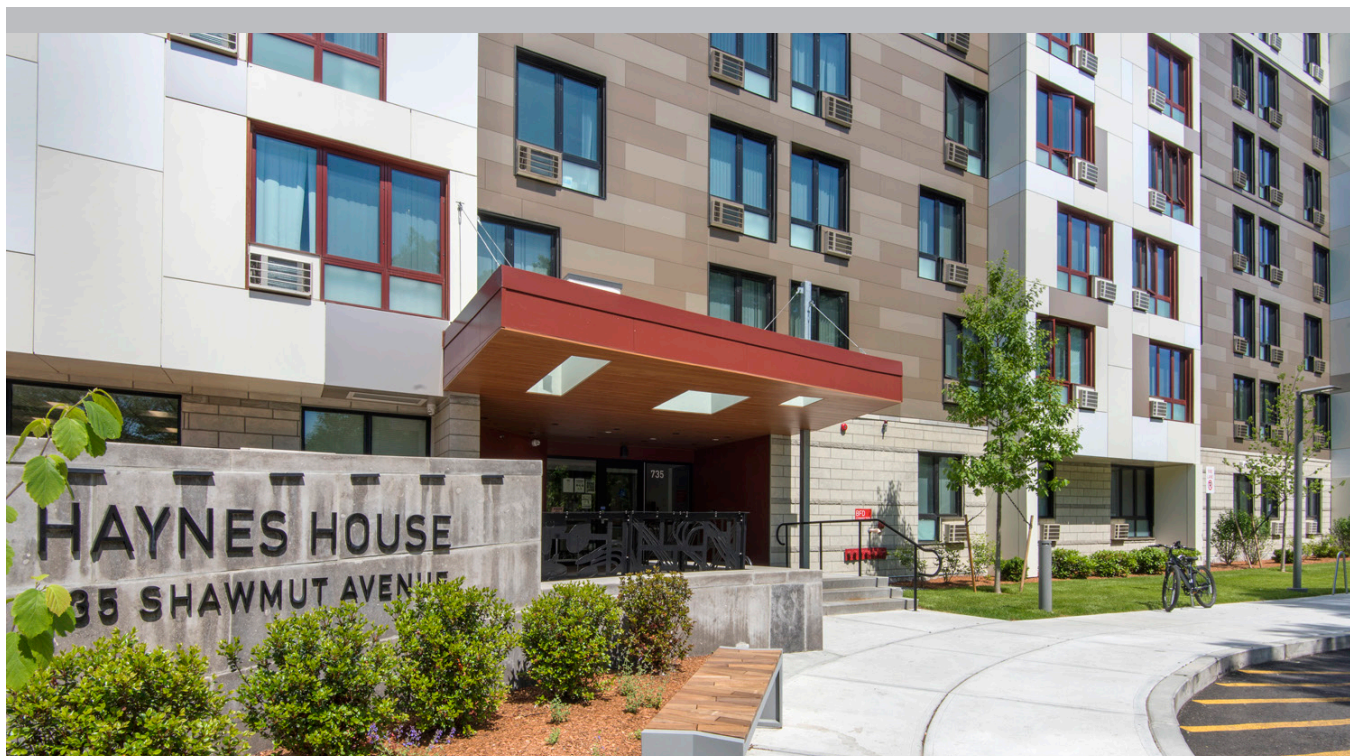
that advance our goals. Metro West CD has developed 73 units of affordable housing with an additional 92 units in the construction pipeline. Metro West CD also responds to over 3,000 calls annually from individuals and families with housing questions or crises. Metro West CD works extensively with private 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.

In Newton Metro West CD has most recently:

1) Completed the construction of 236 Auburn Street, an 8-unit project built on behalf of the non-profits CAN-DO and The Price Center, and

2) Administered nearly \$3 million of emergency housing assistance on behalf of the City of Newton.

Civico Development, founded in 2014, is a community-focused real estate investment and development group founded on a commitment to quality design, historic preservation, and neighborhood-oriented infill development. Civico’s mission is to design and construct high quality buildings, streetscapes, and neighborhoods that significantly enhance the social livability and environmental sustainability of our communities. Our work includes projects of all scales, focused on authenticity, walkability and human scale development. Civico strives to incorporate innovative design and civic spirit into all its projects.



Civico has developed over 250-units of mixed-income housing in Greater Boston that have leveraged both public and private funding, while working in concert with municipalities and city and town officials. Civico has another 250 units in the permitting and construction pipeline. We pride ourselves on the totality of the real estate development process - which includes working with all project stakeholders (the municipality, abutters, lenders, residents) to provide unique housing solutions to serve the needs across various communities within the Commonwealth.

In Newton alone, Civico has most recently:

- 1) Completed 13-17 Gardner Street, an infill development of four (4) townhomes in Newton Center (an additional 8 units of similar projects have been completed since 2016)
- 2) Acquired site control of five parcels across Newton that are planned to create over 25 units of mixed-income housing and expected to go through permitting in 2022.

Please refer to the Appendix for brief descriptions of relevant Metro West CD and Civico projects.

Additional team members include:

Davis Square Architects brings over 35 years of experience in affordable housing, historic renovation, and sustainable design to the team. They are an industry leader with significant DHCD and 40B experience and offer thoughtful vision and creativity to the West Newton Armory site.

Colantonio is a General Contractor with significant experience building affordable housing for affordable housing projects funded by DHCD, as well as the adaptive reuse of historic structures.

Maloney Properties (WBE) is one of Massachusetts's leading affordable housing property managers. Their expertise in working with local non profits 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.

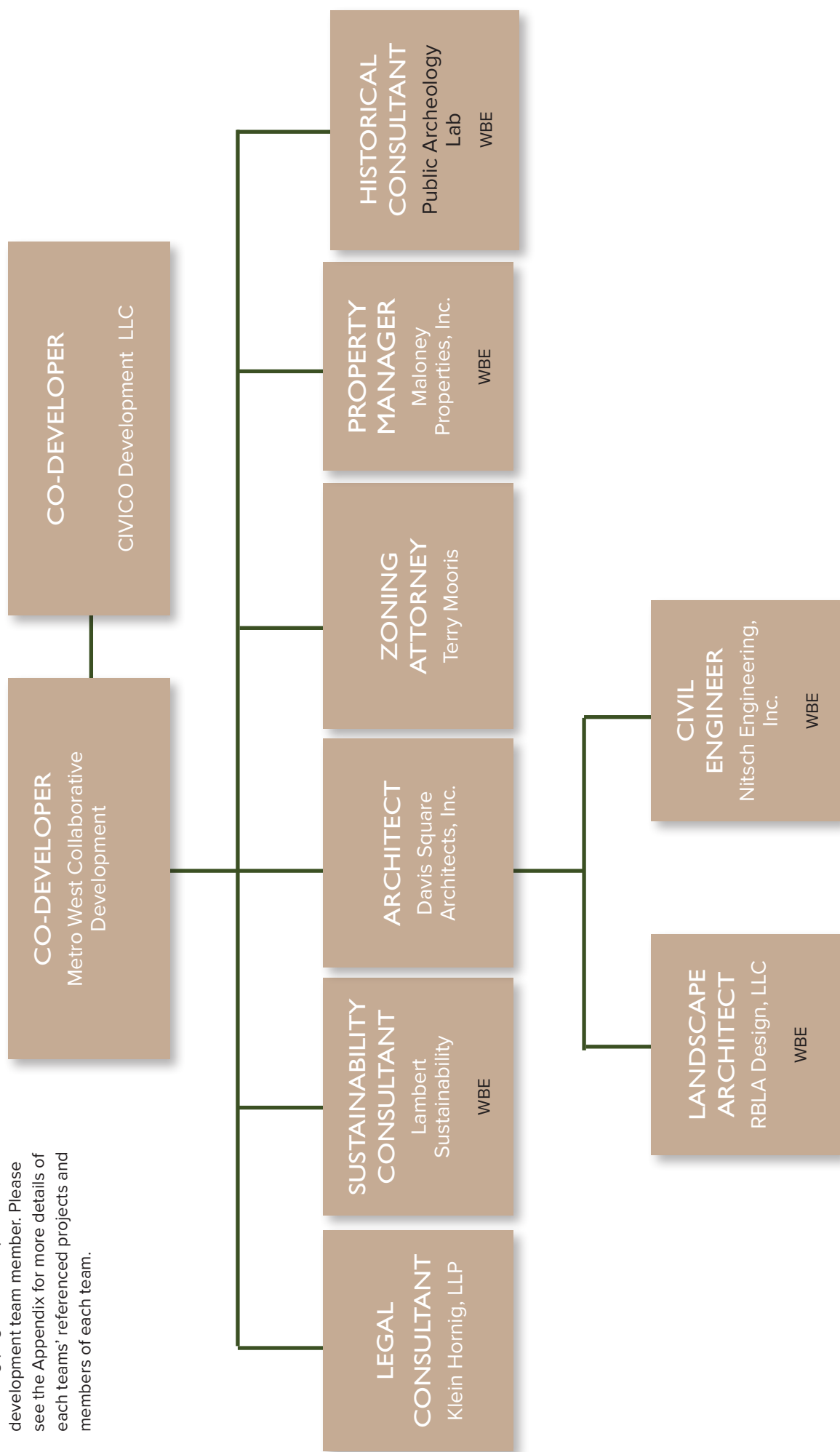
Other technical advisors will include: Lambert Sustainability will be performing sustainability assessments (WBE), RBLA Design (WBE) as the landscape architect, Nitsch Engineering (WBE) as the civil engineer, and Public Archeology Lab as the Historic Consultant.

All team members are leaders in their respective fields and have worked on numerous similar projects. Furthermore, many of the team members have collaborated together on prior projects. 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 include profiles of each development team member. 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 resident 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 areas Councils on Aging, for seniors who are thinking about downsizing but don't know where to begin.

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.



FIRM PROFILE

Civico is a community-focused real estate investment and development group founded around a commitment to quality design, historic preservation and neighborhood-oriented infill development. Civico, the numerical designation of a built place within our community, strives to create an intriguing blend of innovative design and civic spirit into all of its projects. Our mission is to design and construct high quality buildings, streetscapes, and neighborhoods that significantly enhance the social livability and environmental sustainability of our communities. Our work incorporates projects of all scales, focused on walkability and human scale development.

FIRM PHILOSOPHY

Civico was founded under the commitment to the principles of Smart Growth and New Urbanism while adhering to the following four core beliefs:

Collaboration

Our projects frequently involve entitlement, regulatory, historic, neighborhood and community issues. This fact alone is one reason we've come to embrace creative collaboration. We genuinely seek, consider and incorporate input from all stakeholders.

Design

We give careful consideration to the design of space and architecture of buildings to create exceptional properties with distinctive character. Our value-based design approach and years of experience in architecture, project management, and construction, able us to deliver high quality designed and sustainable spaces and buildings that endure over time.

Build

Construction today is a both science and craft, in ways that it never has been before. We align ourselves with the most competent and fiscally innovative contractors at the early stages of development process.

Invest

Our investment philosophy is to invest in projects where our strategic and proactive entitlement, design focused development, redevelopment, repositioning, leasing, and management expertise can add value. We seek projects that will enhance, enrich, and enliven the communities where people live, work, and play.

RELEVANT PROJECTS

ORIOLE LANDING | LINCOLN



PROJECT DETAILS

LOCATION
Lincoln, MA

SIZE / UNITS
60 Residential Units
72,000 sf GFA

TYPE
Mixed-Income Rental

COST
\$21MM

ARCHITECT
Andrew Consigli, AIA
Olinger Architects

CONTRACTOR
Bald Hill Builders

SUSTAINABILITY
LEED for Homes Certified

INFRASTRUCTURE
Private Septic

PROJECT HIGHLIGHTS

- 60 mixed-income rental units
- Historic restoration of existing farmhouse
- Partnership with the Town of Lincoln's Affordable Housing Trust
- Approved at town meeting with extensive neighborhood outreach
- Solar array in permitting

PROJECT OVERVIEW

Developed by Civico, Oriole Landing is a 60-unit, mixed-income rental community in the Town of Lincoln. Through a creative community outreach effort, the project was approved at Town Meeting within six months of submission.

Through the Commonwealth's Local Initiative Program ("LIP"), Oriole Landing partnered with The Lincoln Affordable Housing Trust and received a \$1MM loan to secure a permanent deed restriction for the affordable units.

Oriole Landing is designed around a central courtyard and community garden that promotes interaction with one's neighbors and fresh, truly local food.

By working with the Lincoln Historical Commission, the \$21MM project included the relocation and restoration of an 1860 Victorian farmhouse.

RELEVANT PROJECTS

ACE FLATS | READING



PROJECT DETAILS

LOCATION
Reading, MA

SIZE / UNITS
55 Residential Units
65,000 sf GFA

TYPE
Rental/Retail

COST
\$21MM

ARCHITECT
Andrew Consigli, AIA
Olinger Architects

CONTRACTOR
Delphi Construction

SUSTAINABILITY
LEED Silver Certified

PROJECT HIGHLIGHTS

- 55 mixed-income multifamily rental units
- Contextual downtown infill development with ground floor retail
- Permitted under Commonwealth's Chapter 40R zoning
- Received \$1.4MM from the Commonwealth's DHCD

PROJECT OVERVIEW

Ace Flats is a 55-unit, mixed-income, mixed-use rental building in the Town of Reading. Currently leasing, this TOD is located on a major intersection in Reading's central business district steps from the commuter rail station. This project is a partnership with Traggorth Companies and was permitted under Chapter 40R.

The \$21MM development was financed with a \$14.2MM construction loan from Property Casualty Initiatives LLC. An additional \$1.4MM soft subsidy was awarded by DHCD. Total development costs were \$21MM, of which the DHCD soft subsidy supports 25% affordability. Massachusetts Housing Partnership (MHP) is the permanent lender with a \$7.1MM loan.

In addition, the development team utilized MHP's Green Building Certification (GBC) Financing, which encourages developers to design to certain standards such as LEED. This project will be LEED Certified Silver.

RELEVANT PROJECTS

TINY HOUSE VILLAGE | WORCESTER



PROJECT DETAILS

LOCATION
Worcester, MA

SIZE / UNITS
21 Residential Units
3.65-Acre Site

TYPE
ELI Affordable Rental

COST
\$4.5MM

ARCHITECT
Union Studio

ENGINEER
Bohler Engineering

SUSTAINABILITY
LEED Certification

PROJECT HIGHLIGHTS


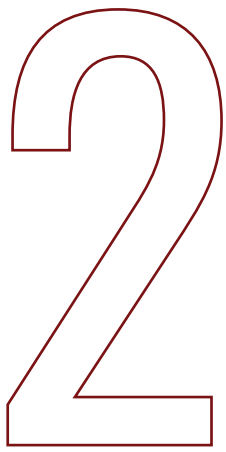

- 21-units of housing for clients of the Department of Mental Health
- Development consulting team includes Union Studio, Bohler Engineering, and Sustainable Comfort, Inc.
- Partnership between Civico and Worcester East Side CDC
- Pre-development funding from UMass Memorial Health

PROJECT OVERVIEW

The proposed project is a planned development of twenty one 480 square foot “tiny homes” clustered around a common house. A “pocket neighborhood” is a type of planned community that is designed to encourage community by better integrating greenspace and clustering homes around a shared green amenities.

This collaboration between Civico, Worcester East Side CDC, and Open Sky Community Services, is a housing first approach to chronic homelessness in the City of Worcester.

Individuals who will live in the Village will have the privacy and security of their own home as well as the support of the community and staff team as they recover from the traumas and challenges common to being homeless. The project is in pre-development and is expected to start construction in mid-2022.



2



Design Concept

- 
- Development Description
 - Site Plan
 - Level Plans
 - Elevations
 - Building and Wall Sections
 - Street Level View
 - Aerial Views

DEVELOPMENT DESCRIPTION

Our proposal creates 43 new units of inter-generational affordable rental housing at the former West Newton Armory site located at 1135-1137 Washington Street. The housing will be affordable to a variety of households with incomes up to sixty percent (60%) of the area median income (“AMI”), including a set aside for households with incomes up to thirty percent (30%) AMI. Our proposed design sensitively balances the competing commitments for historic preservation, affordable housing, and sustainability - both within the building envelope and by thoughtfully using open space to match our programmatic goals. It meets or exceeds all of the development objectives outlined in the Request for Proposals (“RFP”).

Historic Preservation

The existing Armory building which includes the head house and fieldhouse, has been an iconic and vital fixture in the West Newton neighborhood for over 100-years. We strongly believe that preserving and activating the head house, and maintaining the street-facing character that has been part of the fabric of the neighborhood for so long, is essential to a successful design. We also understand that the fieldhouse, although just as meaningful in its own right, will have to be demolished to best serve the stated objectives of the RFP. We believe that the head house can serve the community for well beyond the next century as a highly functional, multi-use space. The ground floor will feature a community room, management offices, and gallery space. The second floor would become the new

office location for Metro West CD. They are committed to becoming a long-term tenant in the building, creating a level of local stewardship that will be an asset to both the residential tenants and the greater community.

Our approach to historic preservation is to maximize the activation of the character-defining head house while selectively demolishing the fieldhouse, which creates a tremendous opportunity for the development of affordable housing. Our project team will consult with the City of Newton Historical Commission through its review established in the DCAMM/MHC/ City Memorandum of Agreement and the demolition delay process. Furthermore, we will consult with Massachusetts Historic Commission (“MHC”) in compliance with state and federal historic regulatory review requirements.

Site Design

The site design provides for a series of unique open spaces, while placing emphasis on the pedestrian and creating human scaled spaces for its users. Parking is directed off of Washington Street and onto Armory Street towards the rear of the site, utilizing the slope of the street to bring cars under the building and minimizing surface parking. By eliminating the need for a curb cut off of Washington Street, the sidewalk can continue along the entire frontage of the property without any interruption from vehicles. This also creates a large open space on the west side of the building that will be used as multipurpose open space for residents.



By locating the larger 4 story mass to the rear of the site, it becomes a thoughtful backdrop for the head house which remains the prominent front at Washington St. A welcoming and inviting entry is located at Armory St. Set back a few feet from the head house, the fully accessible entry is visible from Washington Street without detracting from the historic armory building.

Landscape Design

The entire landscape has been designed with both the public and building residents in mind. The open spaces are designed to accommodate a range of age groups and provides outdoor amenities for a inter-generational community.

Foundation plantings will join the existing street trees to soften the historic facade, and screen the proposed deck off the Community Room. Benches are being considered along the front entry walk which may be convenient to bus and Blue Bike users alike, as well as visitors of the Community Room. On Armory Street, a shared plaza accommodates the accessible entrance to both the residential and community portion of the building, and features visitor or delivery bike parking, and a bench for people watching, or as a waiting area for ridesharing pick-ups. Shade trees will complement the existing street trees on Washington Street.

The courtyard created by the newly constructed building will serve resident families with an accessible strolling path, foundation plantings, and lawn space for play and activities. A hedgerow provides separation from the neighboring property. This lawn, accessible from the rear of the building with a ramp, can be used for all residents - young children may enjoy playing games such as cornhole or Kan Jam while older residents might enjoy reading a book on the all-weather lawn furniture.

To the north, a shade garden enhances separation between the new residences and the abutter's existing parking lot.

Exterior Building Design

The proposed addition is designed to be sensitive and contextual without detracting from the historic significance in the head house. The addition distinguishes itself through the use of contemporary materials and a highly sustainable design. The use of masonry at the lower level and brick red colored accents are a nod to the historic materials of the armory.





Parking

We believe the project provides sufficient parking, with 28 total spaces at an approximately .66:1 ratio which is appropriate for the housing type, unit mix, and urban environment. The parking layout makes efficient use of the site in order to maximize open space and landscaped areas, taking advantage of the declining slope in the street. Outdoor parking is provided along Armory Street, close to the main entrance for deliveries and short term visits. Located under the new addition, the parking is hidden from view of the street, while still accessible for all residents as it's planned to be served by 2 elevators which connect to upper levels. On street parking along Armory Street is provided for short term parking and drop off. Bike parking is also numerous, which in addition to the Blue Bikes, is adding 43 docks in the basement storage area, and 11 in the public plaza.

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 compliant 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 courtyard. 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 Building Spaces and Unit Mix

The design of the new addition is respectful of both the historic architecture of the existing head house and of the existing context of the West Newton community. Through the utilization of massing techniques and material selection, the new addition is in scale and harmony with its surroundings and compliments both the head house and the broader neighborhood. The building will include a series of spaces and amenities that will encourage activity and community interaction among the residents.

Accessibility

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 by having 10% of the units as 3BR, and 65% 2BR+ units. All units are visitable and five will be fully accessible HC units (4 of which will be enhanced CBH units) which exceeds code requirements. All units in the building will be served by two elevators and will incorporate universal design strategies that support aging in place.

The plans include the following spaces:

Community Room

The large Community Room in the head house will be able to accommodate gatherings and meetings for both the tenants of the building and the wider Newton community. The room is situated on the first floor and opens directly onto an outdoor patio which will overlook the building's courtyard, while having frontage along Washington Street. The community room will also feature a newly installed window in the rear, which will provide a visual connection to the lawn. This visual connection will allow the landscaped areas, and any outdoor activities to be seen from the community room - which can encourage further use of the outdoor areas. In addition, it will provide the opportunity for parents or guardians to view their children playing outside, without the need to be exposed to the weather - in instances of a grandparent who may be caring for their grandchildren during a snow day or an older sibling babysitting and needing to complete schoolwork while their younger sibling plays outside. In both instances outdoor supervision is possible from the climate controlled environment.

Management Office

The on-site property management office is located on the ground floor within the existing head house, accessible by both entrances and visible from Washington Street and Armory Street. The management office is large enough to feature a private meeting room for the resident services staff to engage privately with residents, their families, and prospective members of the community. It will also provide storage space for common maintenance items and seasonal building decorations.

Entrance Lobby/Gallery

A welcoming lobby is located by passing through the Armory Street entrance, while a secondary lobby is located off of Washington Street through the original head house. The Armory Street lobby includes a mail area and dedicated package room, with access to the elevator. The head house entrance feeds into a publicly accessible space that highlights the history of the building and its previous use as an armory, which would include a blend of historic photographs and artifacts.

Roof Deck and Solar Array

An accessible roof deck provides a secondary amenity space for vegetable gardens and seating areas. The adjacent roof area between the roof deck and existing head house will accommodate a solar array that will generate electricity for the building.

Offices

The 2nd floor of the existing head house will be the new headquarters for Metro West CD. Overlooking Washington Street and Armory Street, this new addition to the neighborhood will be a significant asset to both the property itself and the West Newton Community.

Bike Storage

As biking is a sustainable, and increasingly popular mode of transportation and leisure, the proposal accommodates outdoor and indoor bike parking. Exterior racks are located at the entrance of the building for visitors or deliveries. Inside, a dedicated bike room can accommodate approximately 40 bicycles to promote healthy living and reduce the need for individuals and families to store them in their residences.

On-site Laundry

Laundry for tenants will be provided on site in a convenient centralized location on the basement level, as opposed to multiple smaller laundry rooms on each level. We believe the centralized location, which has a seating area and space for folding laundry, will help foster more casual interactions among residents and help to build community.

Trash and Recycling

The building is equipped with trash and recycling rooms on each level of the building, enabling easier disposal of trash. To minimize impact to the site and neighbors, the trash and recycling pick up is planned to be located off of Armory Street and within the building footprint to conceal the view from neighbors.



PARKING LOT

WEST
NEWTON
HEALTHCARE

KEMPTON PLACE

DUNSTAN EAST
BUILDING 3

ARMORY STREET

TRADER JOE'S

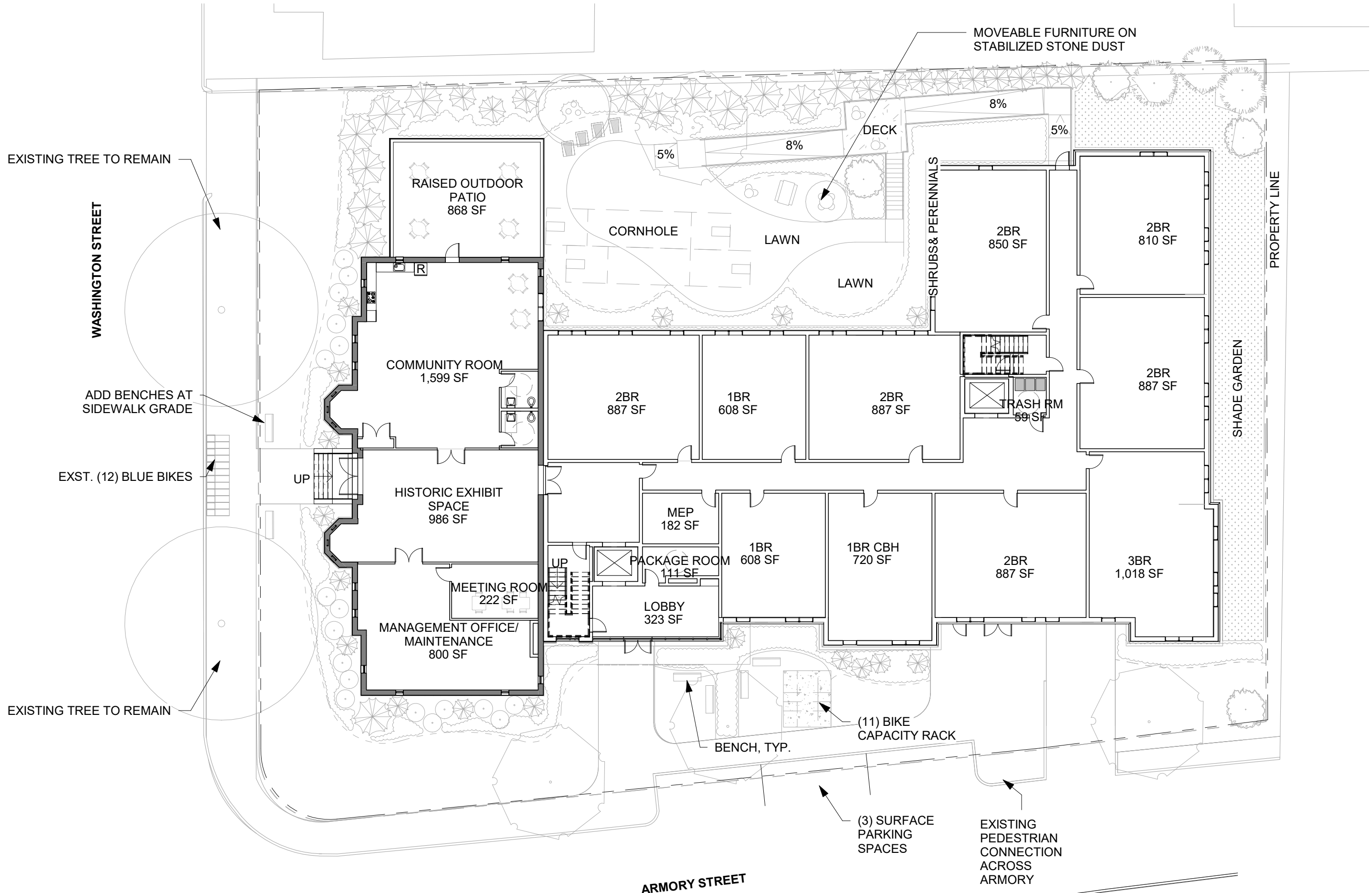
WASHINGTON STREET



PROPOSED SITE PLAN

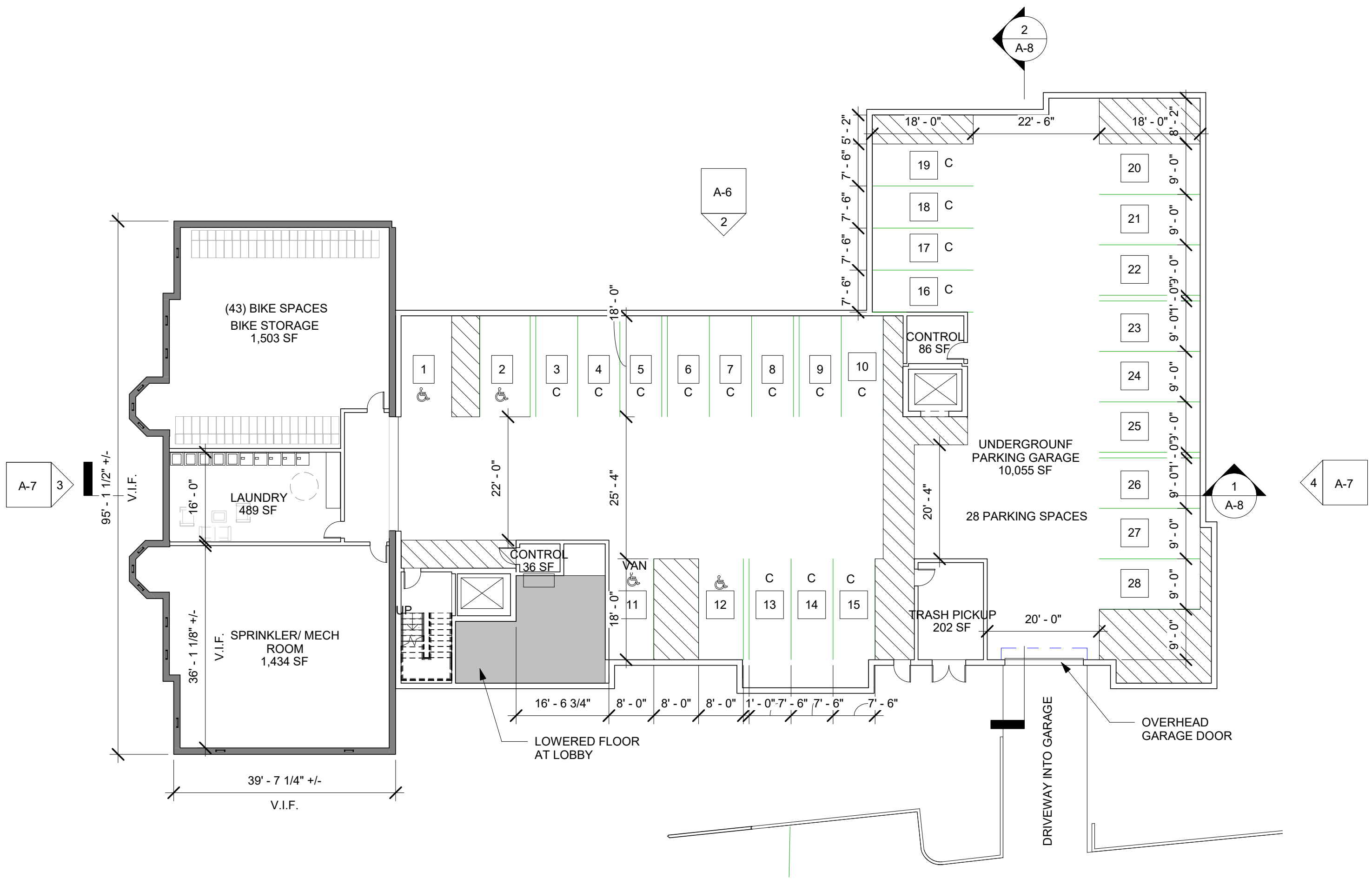


DAVIS
SQUARE
ARCHITECT



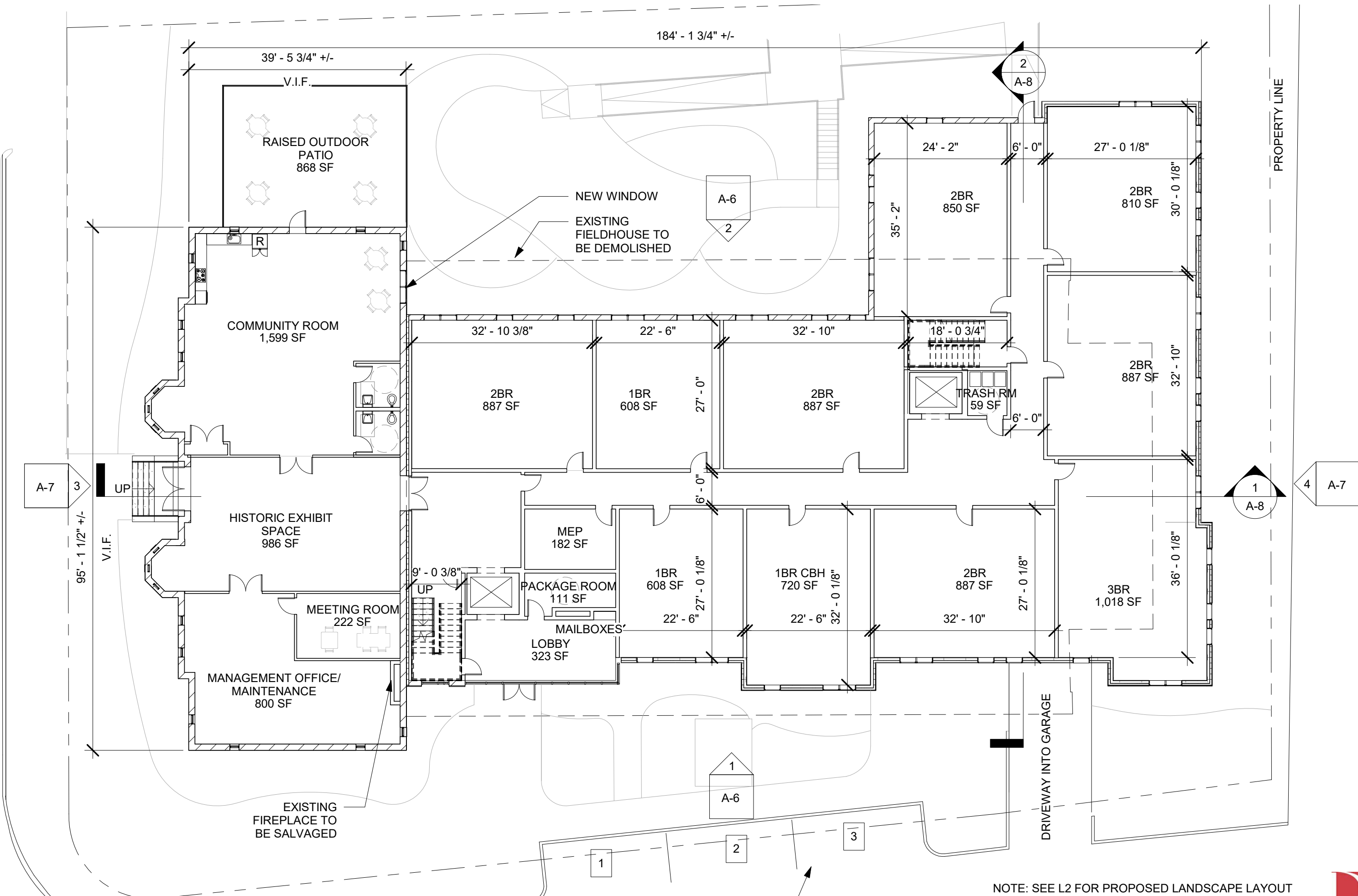
1 PROPOSED LANDSCAPE PLAN
1" = 20'-0"

PROPOSED LANDSCAPE PLAN L-1



1 PROPOSED BASEMENT PLAN
 1/16" = 1'-0"

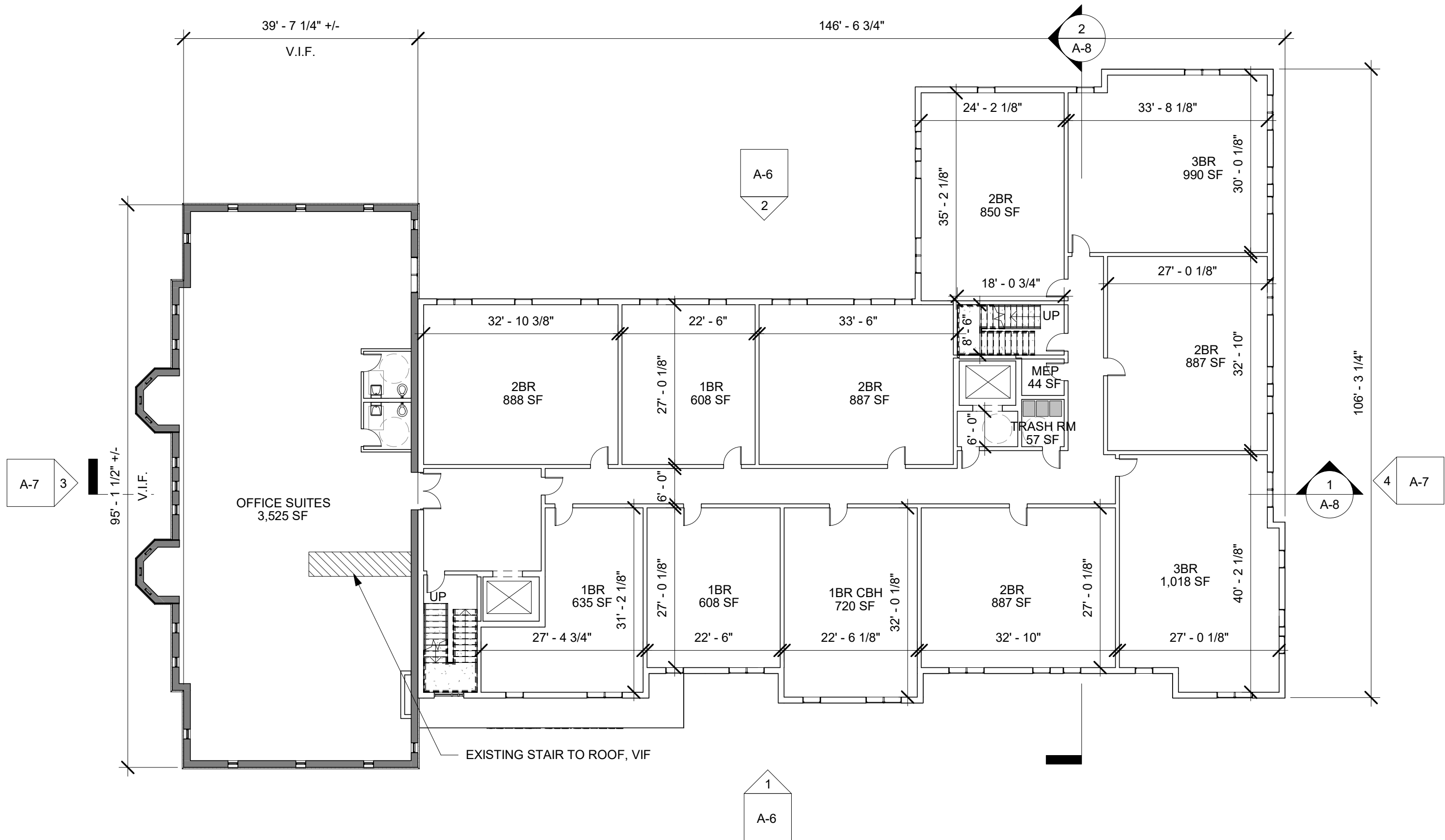
PROPOSED BASEMENT PLAN A-1



1 PROPOSED FIRST FLOOR PLAN
1/16" = 1'-0"

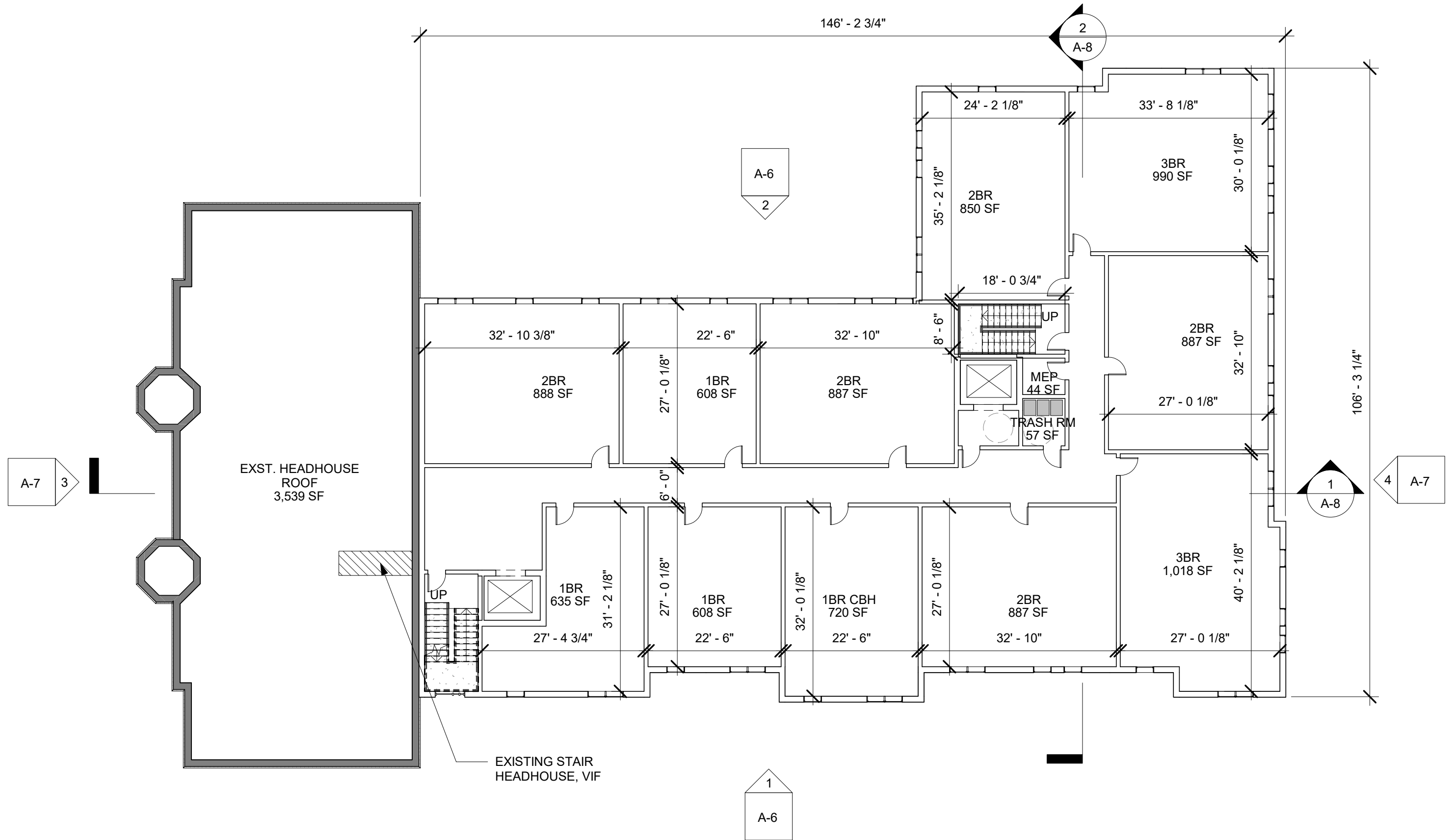
NOTE: SEE L2 FOR PROPOSED LANDSCAPE LAYOUT

PROPOSED FIRST FLOOR PLAN A-2



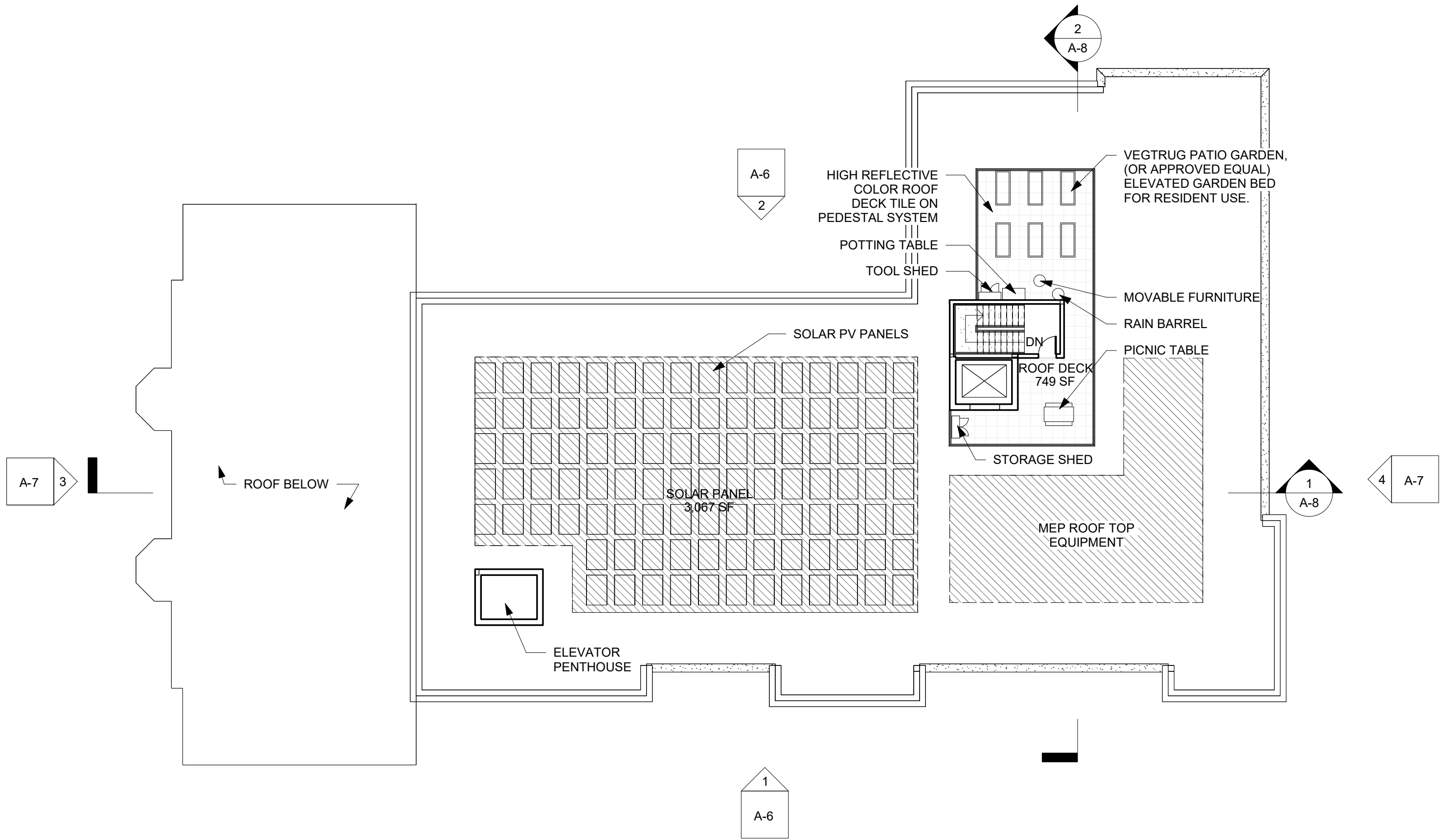
1 PROPOSED 2ND FLOOR PLAN
 1/16" = 1'-0"

PROPOSED SECOND FLOOR PLAN A-3



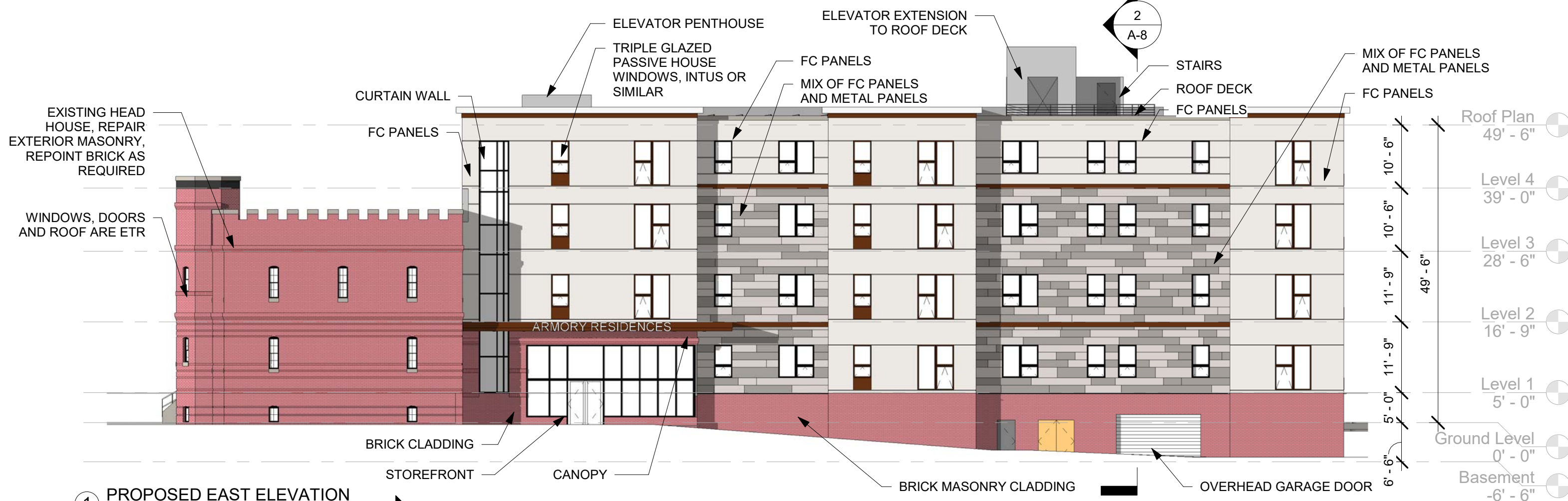
1 PROPOSED 3RD/4TH FLOOR PLAN
 1/16" = 1'-0"

PROPOSED TYP. UPPER FLOOR PLAN A-4

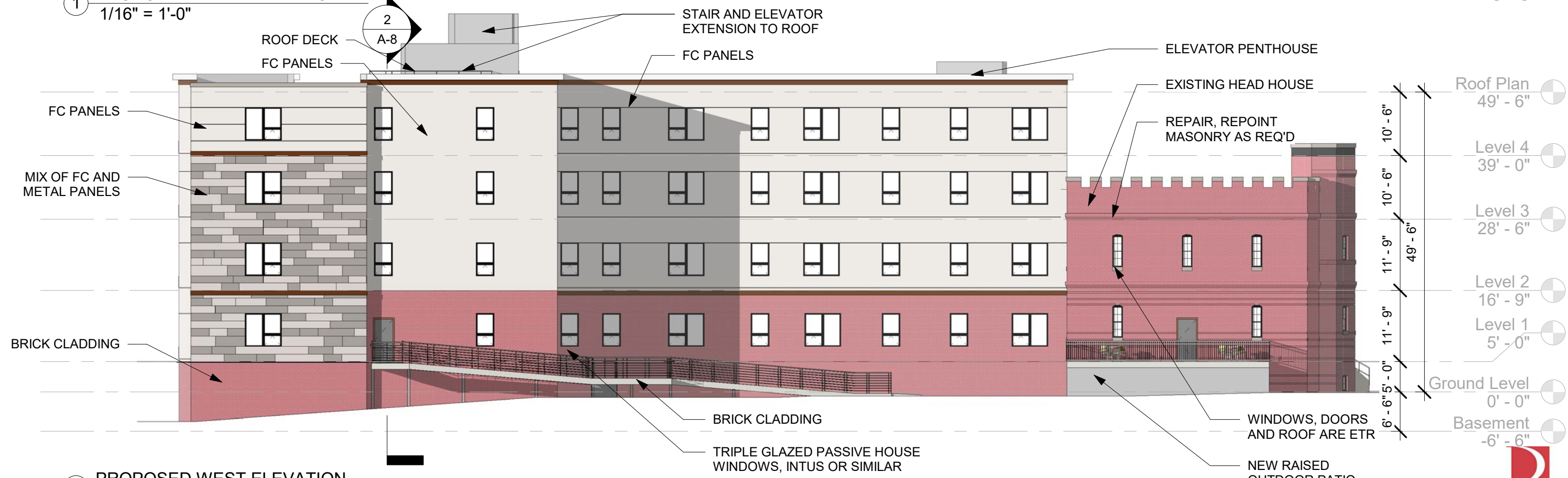


1 PROPOSED ROOF PLAN
1/16" = 1'-0"

PROPOSED ROOF PLAN A-5

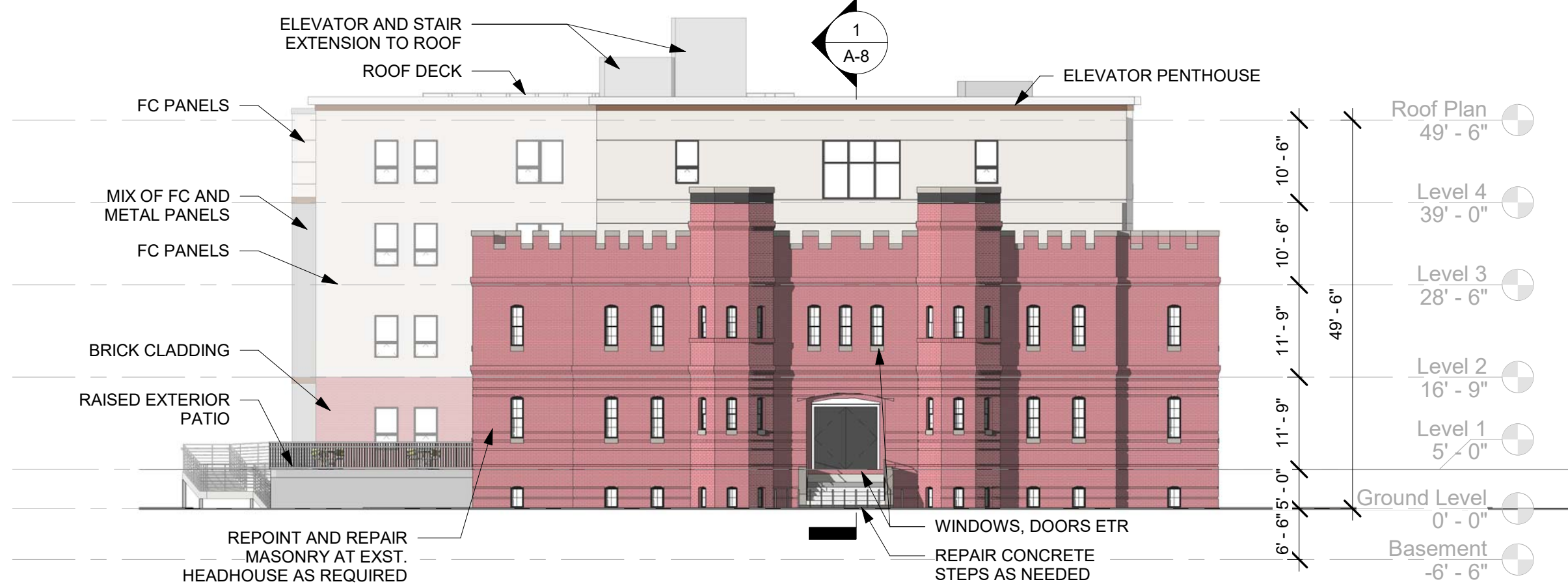


1 PROPOSED EAST ELEVATION
1/16" = 1'-0"

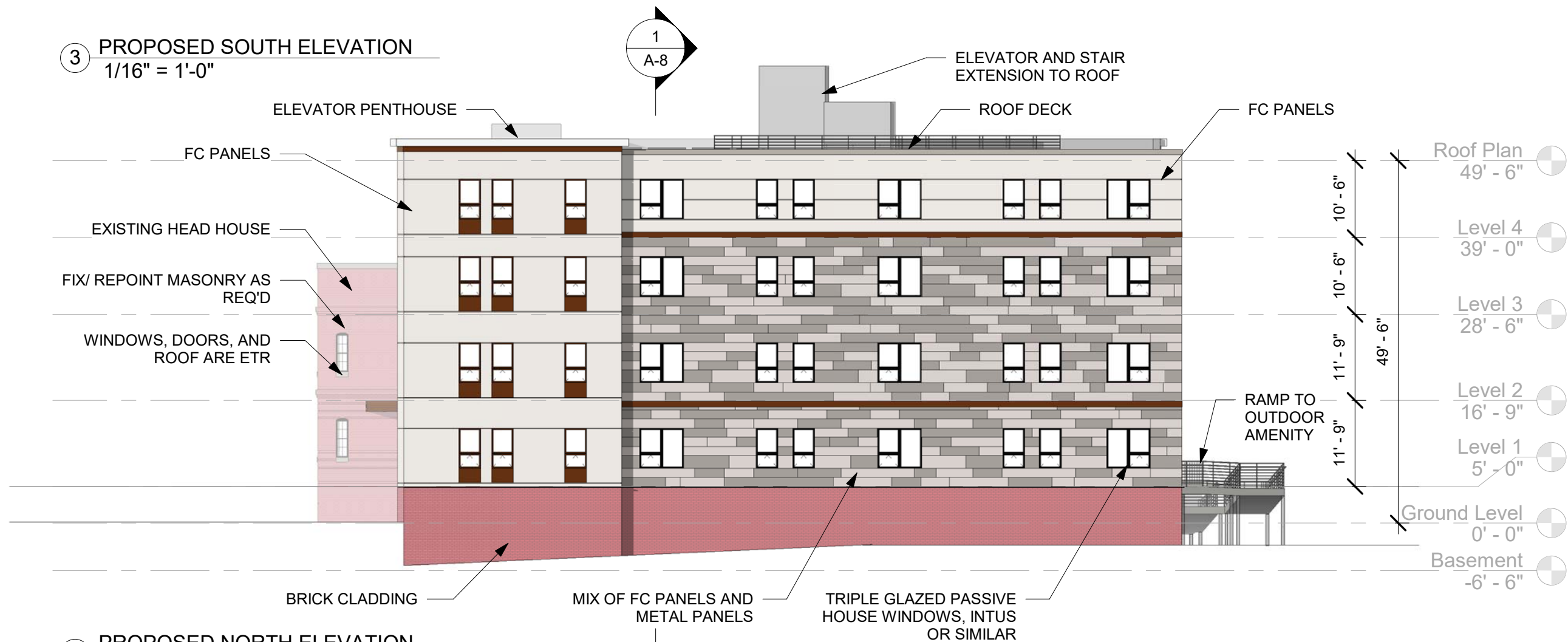


2 PROPOSED WEST ELEVATION
1/16" = 1'-0"

PROPOSED ELEVATIONS A-6

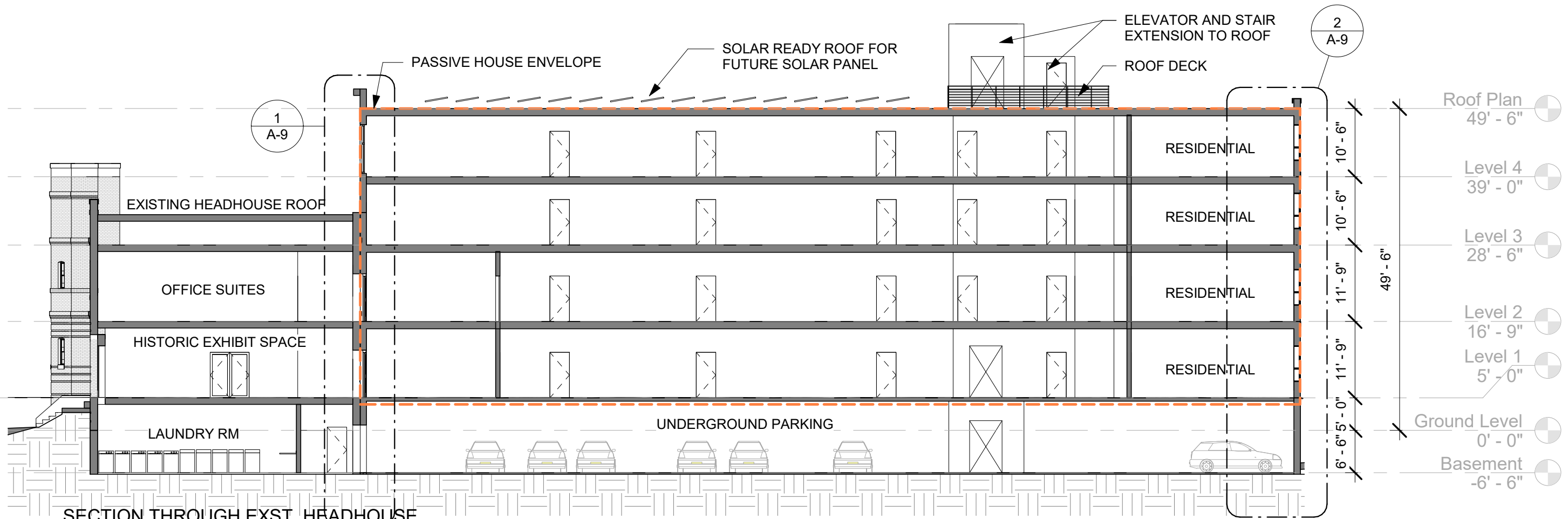


3 PROPOSED SOUTH ELEVATION
1/16" = 1'-0"

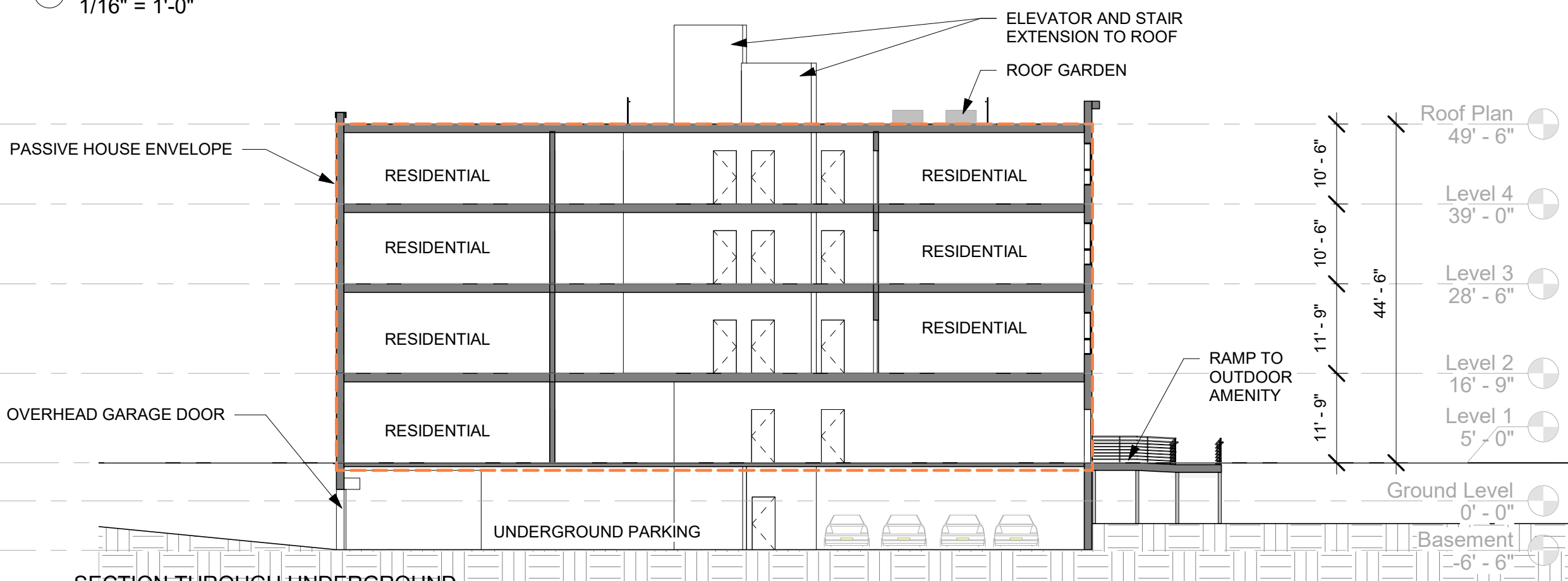


4 PROPOSED NORTH ELEVATION
1/16" = 1'-0"

PROPOSED ELEVATIONS A-7



SECTION THROUGH EXST. HEADHOUSE AND NEW ADDITION
 1
 1/16" = 1'-0"

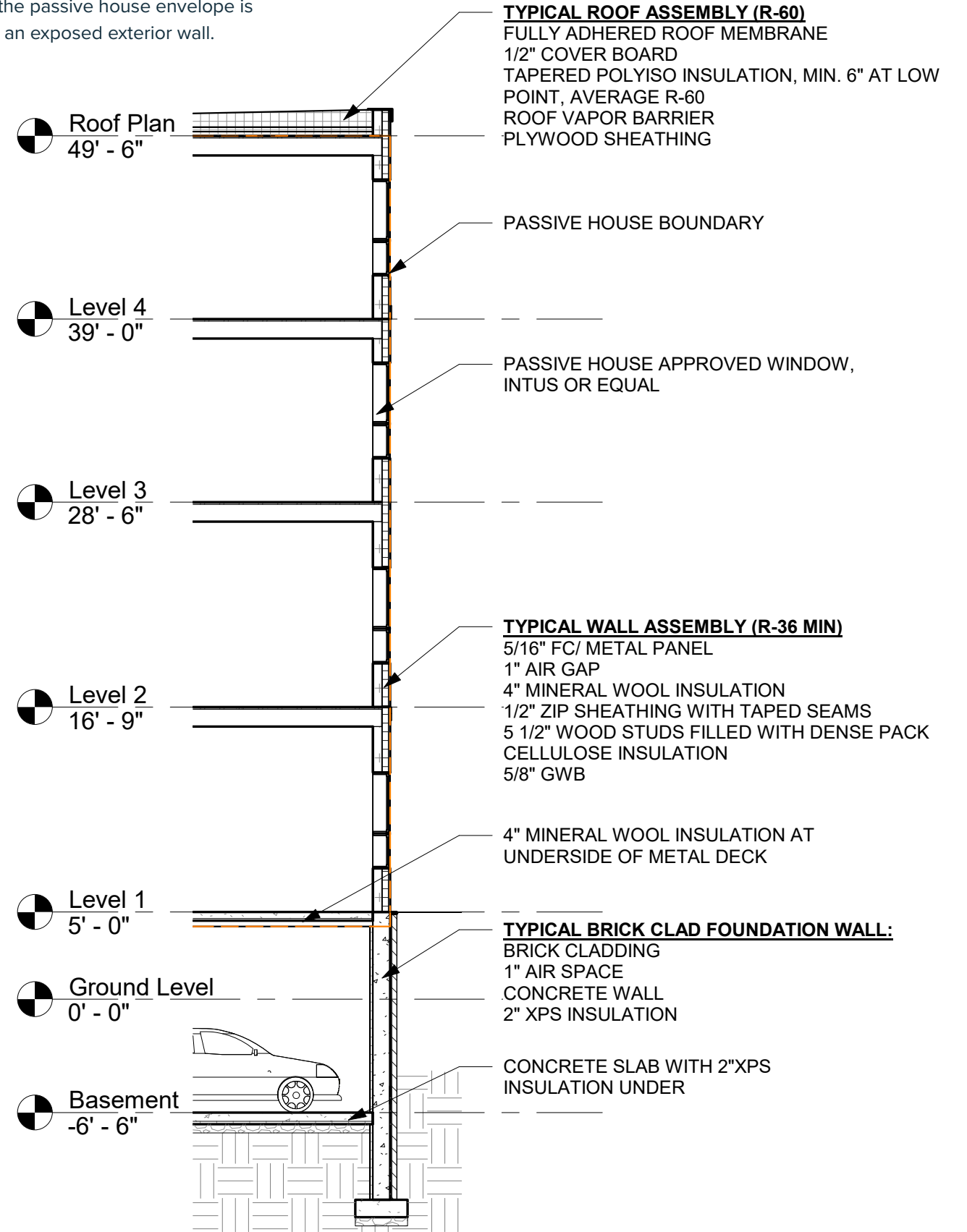
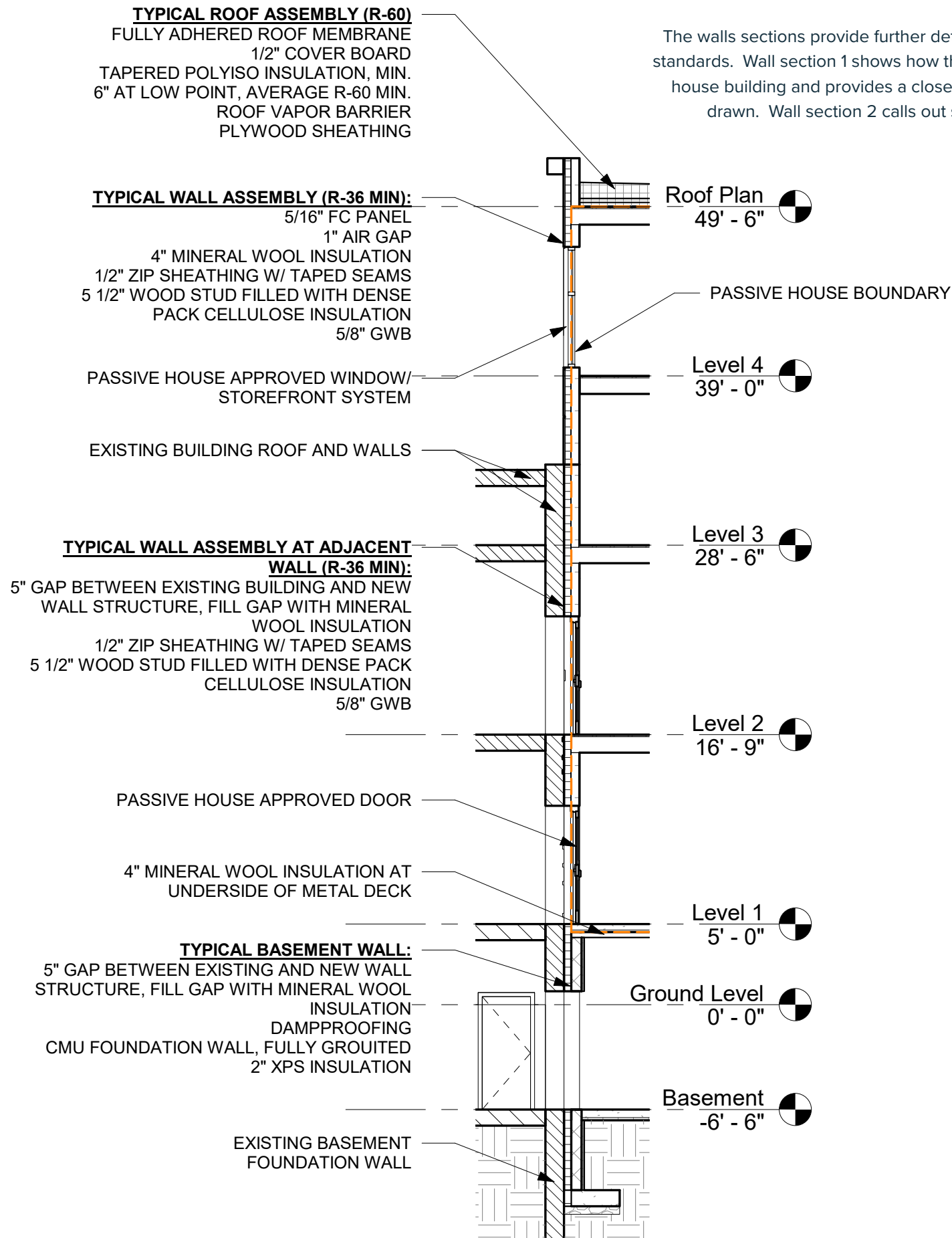


SECTION THROUGH UNDERGROUND PARKING GARAGE
 2
 1/16" = 1'-0"

Building Section 1 shows the connection of the existing head house with the new construction addition. The basement, first, and second floors will align. Building Section 2 shows the entrance into the below-grade parking garage and the relationship between the patio off of the first floor community room and the outdoor open space at ground level. Outlined in orange, is the passive house envelope. Everything within this area will meet passive house standards including enhanced insulation, highly efficient mechanical systems, and high performing windows.

BUILDING SECTION A-8

The walls sections provide further detail of how the addition will meet passive house standards. Wall section 1 shows how the proposed addition will meet the existing head house building and provides a closer look at where the passive house envelope is drawn. Wall section 2 calls out similar details at an exposed exterior wall.



1 TYPICAL WALL SECTION AT ADJACENT BUILDING
1/8" = 1'-0"

2 TYPICAL WALL SECTION
1/8" = 1'-0"



DUNSTAN EAST - BUILDING 3

WEST NEWTON ARMORY

ARMORY STREET

TRADER JOE'S

WASHINGTON STREET

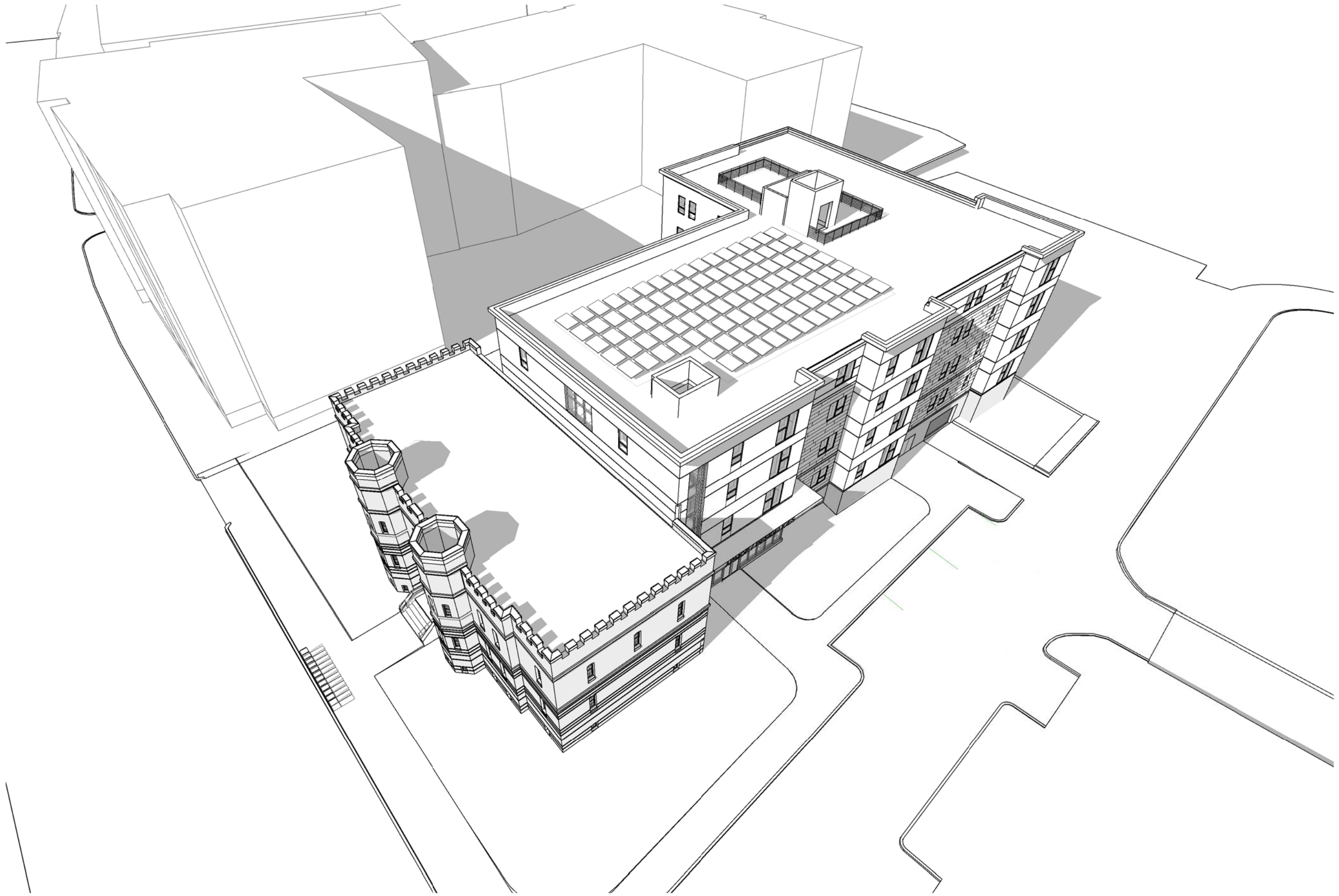
① STREET ELEVATION- SOUTH
1" = 30'-0"

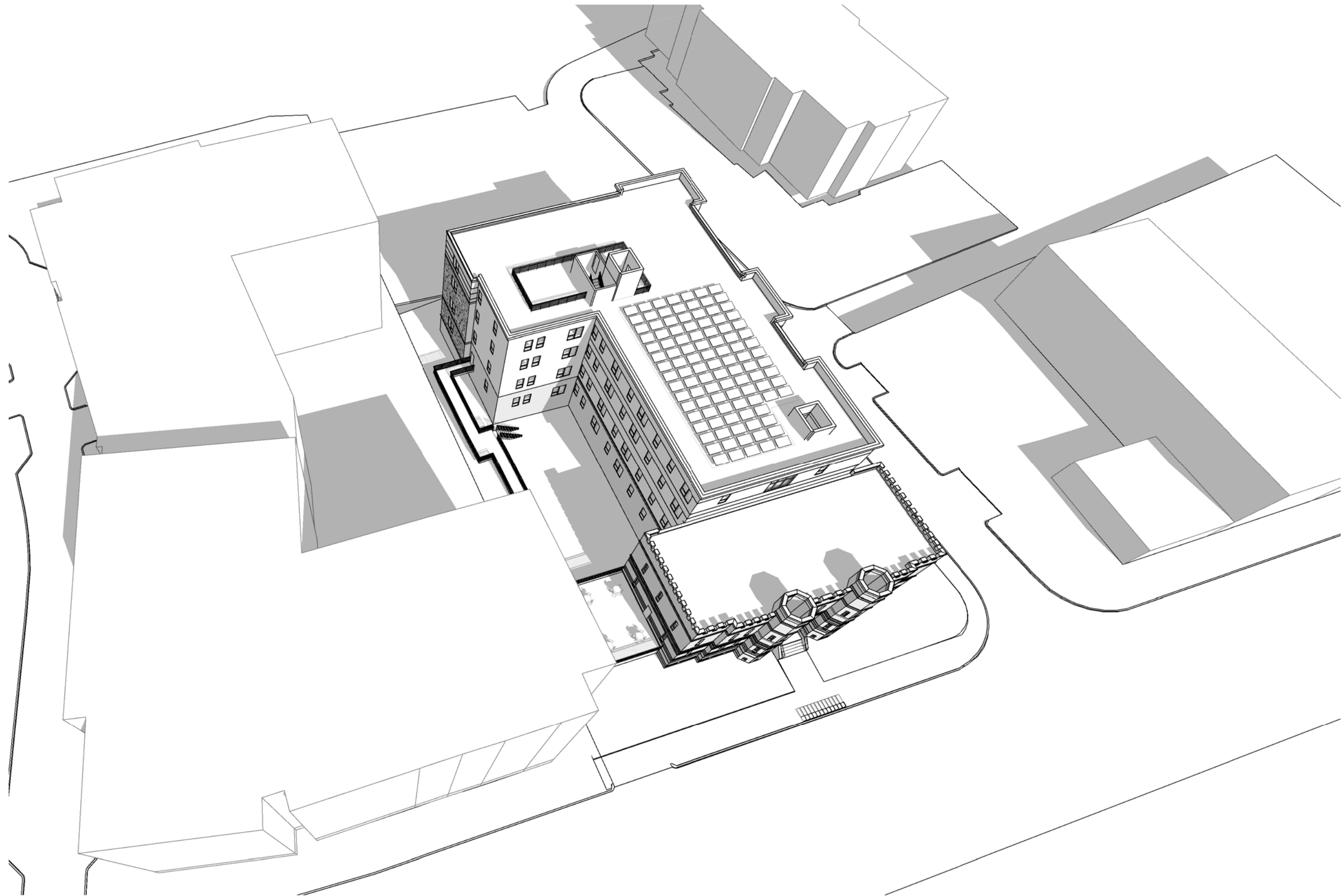


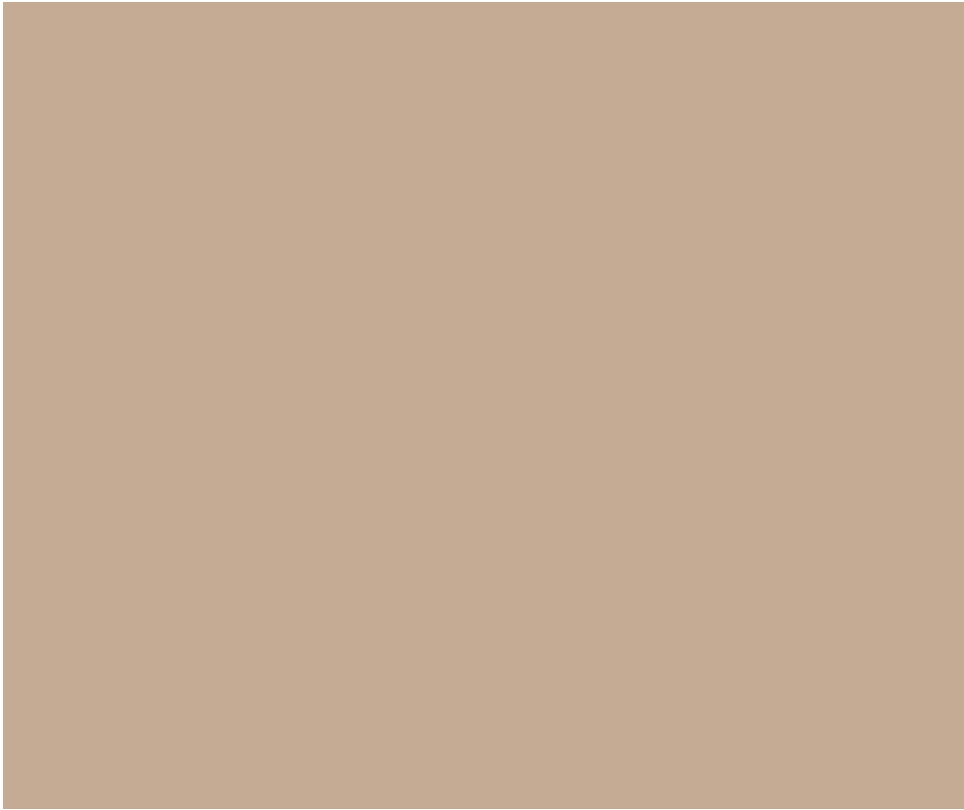
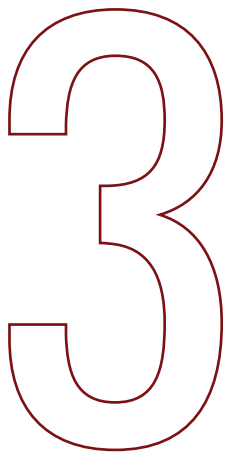

PERSPECTIVE VIEW FROM WASHINGTON STREET A-11



PERSPECTIVE VIEW FROM ARMORY STREET A-12

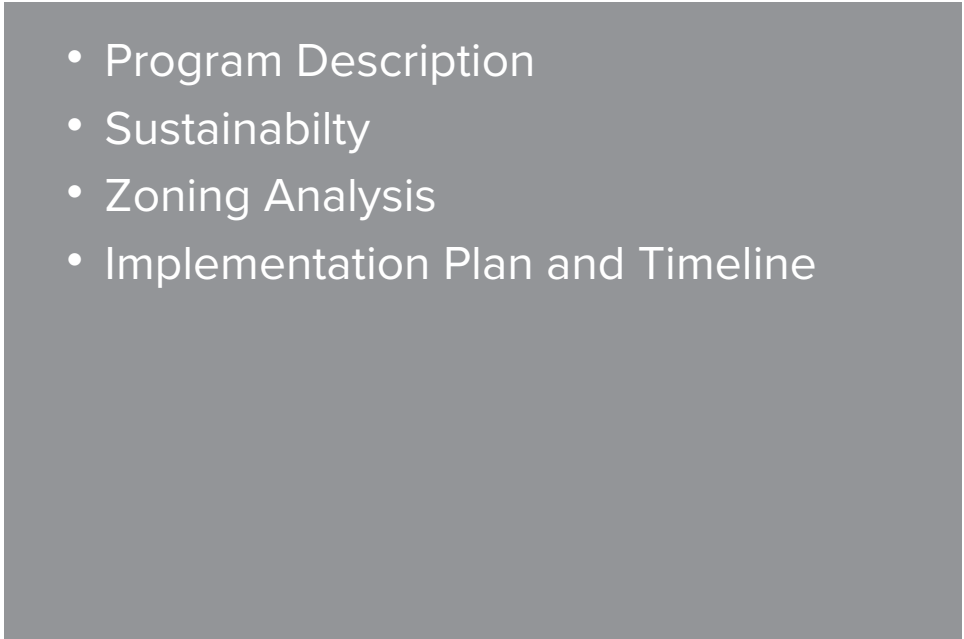






3

Development Program and Timeline

- 
- Program Description
 - Sustainability
 - Zoning Analysis
 - Implementation Plan and Timeline

PROGRAM DESCRIPTION

The City of Newton’s Comprehensive Plan, the 2040 Housing Leads Strategy, the Economic Development Strategic Plan, Housing Needs Analysis and Strategic Recommendations, and Washington Street Vision Plan all prioritize the production of diverse housing opportunities with respect to unit type, size, and affordability. The West Metro HOME Consortium, of which Newton is the lead administering community, has identified the creation and rehabilitation of safe, decent and affordable rental and ownership housing throughout the Consortium as the primary goals in its 2020-2025 Consolidated Plan. As the Consortium’s sole Community Housing Development Organization (“CHDO”), Metro West CD can attest to the very precarious situations in which so many of Newton’s, and the region’s, low-income residents find themselves.

In 2019, Metro West CD received 152 applications from households interested in living in the three (3) deed-restricted affordable units at 236 Auburn Street, which is one and a half miles (1.5) from the Armory.

In 2020, as the pandemic limited people’s employment opportunities, Metro West CD and the City of Newton spearheaded a local Emergency Housing Assistance Program that became a model for dozens of other towns and cities across the Commonwealth. 253 Newton households were awarded approximately \$3.1 million (of local and federal funds) over the 15-month duration of the program. In January 2021, a program participant offered the below:

“This program has helped me and my family so much during this pandemic. I work in a hotel restaurant that has been closed since March with no reopening in sight. I am so grateful to my hometown of Newton for all of the assistance that has been provided to keep us in our home raising our children.”

In August 2021, Metro West CD conducted a survey of the Emergency Housing Assistance Program participants and found that:

- 50% of respondents were unemployed for nine (9) months or longer
- 67% stated that their household income was currently less than it was before the pandemic
- 36% feared being evicted in the next few months

In addition to our direct experience in Newton, we know that the housing market in the region remains extremely tight with very low vacancy rates and escalating prices.

“(In Boston) rent prices today are around \$2,500 for a two-bedroom, non-luxury apartment — almost exactly what they were before the pandemic. ...But vacancy rates have started to plunge again, reducing the need to offer incentives. Just 3% of Boston area apartments are available for rent today — even lower than before the pandemic.” (WBUR Sept. 17. 2021)

Over the past month, the average rent for a studio apartment in Newton increased by 56% to \$2,868. The average rent for a 1-bedroom apartment remained flat, and the average rent for a 2-bedroom apartment decreased by -1% to \$2,500. (Zumper.com 9/24/21)

Clearly, the need for more affordable rental housing for families continues to grow. With a mix of 1, 2, and 3-bedroom apartments targeting a diversity of income ranges between 30 and 60% AMI, our programmatic and architectural approach to the Armory redevelopment will result in a multi-generational, family-oriented community that will provide new affordable housing to 43 households with few other options in Newton.

UNIT BREAKDOWN
15 One Bedroom Units <ul style="list-style-type: none"> • 4 Rental Assisted • 11 @ 60% AMI
21 Two Bedroom Units <ul style="list-style-type: none"> • 2 Rental Assisted • 6 @ 30% AMI • 13 @ 60% AM
7 Three Bedroom Units <ul style="list-style-type: none"> • 1 Rental Assisted • 2 @ 30% AMI • 4 @ 60% AM
43 Total Units

SUSTAINABILITY

The urgency to design and develop innovative solutions to reverse climate change has become even more apparent in recent months, and the built environment has a significant role to play. At the state level, the newly adopted Massachusetts Climate Bill requires a 50% reduction in greenhouse gas emissions by 2030, a 75% emissions reduction by 2040, with a goal to get to net zero by 2050. At the local level, Newton has been an early adopter and advocate for solutions that push the envelope in reducing energy, emissions and a reliance on fossil fuels, and our proposal embraces these goals.

Alignment with the Goals of the Washington Street Vision Plan, Section D: Global Climate and Local Environment

Goal - Provide Options for Low Carbon Living

The proposed project will promote low carbon living and reduce reliance on fossil fuels through both the building operations and in the transportation options it encourages. The building will achieve a very high level of energy use reduction by designing and constructing to the Passive House standard, and will also be all-electric, including the heating, air conditioning and hot water. The synthesis of these strategies results in a high-performance low carbon building with no fossil fuel-based infrastructure. An all-electric building provides a net zero pathway for the future condition when the electric grid is fully powered by renewable energy sources, bringing the greenhouse gas emissions of the project to zero.

The proposed project also has an opportunity to provide rooftop photovoltaics to potentially generate some renewable electricity on site. The new portion of the building will be constructed as solar-ready and as part of the design process, the team will study the feasibility of and potential funding sources for maximizing the new building roof area for photovoltaic panels.

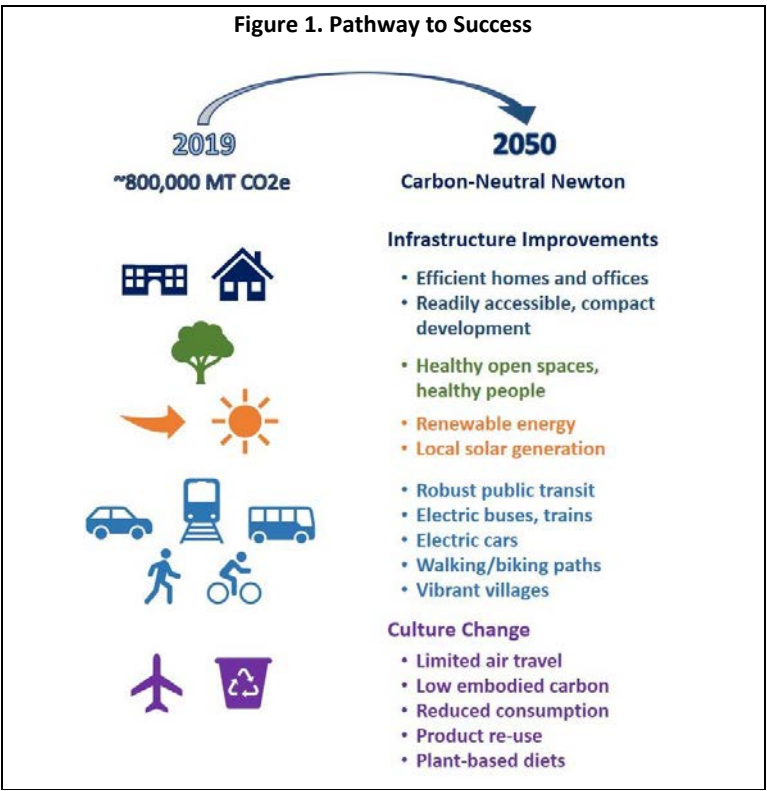
Low carbon living also relies on the integration of alternative forms of transportation to reduce the use of fossil fuel-based vehicles. The proposed project will embrace this concept by installing secure covered bike storage, encouraging neighborhood connectivity for walkability, bikeability and encouraging the use of public transit options. The proposed project design will reuse a portion of the foundation of the existing building to provide an underground parking structure for 28 vehicles and a bike storage room for 43 bicycles. Additional exterior bike racks will be provided at the ground level for visitors.

In compliance with Newton's Sustainable Development Design Ordinance, the project will install electric vehicle charging stations for 10% of the parking spaces. An additional 10% must be 'EV charging station ready' and have the infrastructure in place for future demand. The proposed project includes 28 parking spaces for residents in a garage underneath the new building, and 3 surface spaces along Armory Street for short-term parking and deliveries, for a total of 31 spaces allocated to the project. Inside the garage, three parking spaces will have EV charging stations installed and an additional three spaces will be EV-ready.

The project is located close to several options for alternative transit including a Blue Bikes station at the site, a bus stop at the corner of Armory Street for two bus routes, and is a 12-minute walk to the West Newton commuter rail station.

Goal - Improve Climate Resilience

The Washington Street Vision Plan identifies the highest resilience priorities as reducing heat island effect and managing stormwater to reduce flooding. Climate resilience strategies proposed for the project will reduce heat island impacts through the use of landscaping and open green space, as well as highly reflective roof, site and paving materials. The proposed project reduces the amount of paving and hard surface on the site, thereby improving the stormwater runoff and management. The site is further designed to capture and manage some rainwater on site through bioswales and rain gardens to the extent feasible. Ideas to be further studied include permeable paving to allow for infiltration and capturing and reusing rainwater for watering the community garden.



Alignment with the City of Newton Five-Year Climate Action Plan

The City of Newton published a robust Climate Action Plan in 2019 to guide and reduce climate impacts for the next five years, with the stated long-term goal for Newton to be carbon neutral by 2050. Many of the action items apply to new development projects and the reuse of existing buildings in the City, and in particular the aggressive reduction of greenhouse gas emissions generated by the operations of buildings. As stated above, the use of the Passive House standard coupled with electric-only infrastructure for all HVAC systems will meet this goal.

Image: Newton Climate Action Plan Pathway to Achieving Carbon Neutral

Sustainable Development Requirements per Newton Zoning Ordinance Section 5.13

In parallel with the development of their Climate Action Plan, in December 2019, the City of Newton passed a Sustainable Development Design Zoning Ordinance which includes a number of requirements for projects over 20,000 sf of gross floor area. Projects must either meet a LEED Silver Certifiable rating, a Certifiable level under Enterprise Green Communities or achieve actual Certification under a Passive House Rating System.

Passive House is currently the most stringent building energy design standard available, and our proposed project will seek to achieve that pathway to comply with the ordinance and work towards Newton’s goal of net zero carbon. The goal of Passive House design is to attain a quantifiable and rigorous level of energy efficiency while ensuring superior indoor air quality.

In order to achieve the high level of energy performance and air sealing required for Passive House, while also prioritizing the reuse of this historic and culturally significant structure, the team proposes to retain and reuse the head house portion of the building but demolish and rebuild the field house portion. The footprint of the field house will be rebuilt as a new high performance Passive House building which will house all of the residential units. The existing head house will be retained and the envelope will be repaired, but will not be included in the Passive House Certification. This portion of the project contains the community rooms, new offices for MetroWest CDC and the laundry space .

The project design team includes architects, planners and consultants that hold several sustainable design credentials including LEED Accredited Professionals and Certified Passive House Consultants. This expertise will be drawn upon during the entirety of the design and construction process.

Adaptive Reuse as a Climate Solution

In the last few years, there has been new research and a new understanding that in addition to the operational energy, the embodied energy and the resulting embodied carbon in the building materials is a significant piece of the pie when you look at the climate impacts from buildings. The adaptive reuse of existing buildings and the resulting preservation of the embodied carbon in the building materials is a key tool for reducing the life cycle emissions from new construction. The Newton sustainability ordinance has a placeholder for embodied carbon and the proposed project will address that in several ways. The preservation of the head house portion of the existing building will retain the embodied carbon in the masonry and other materials, and will significantly reduce the embodied carbon of new materials if it had been torn down and replaced. In addition, the team will evaluate lower carbon options for materials in the new construction portion of the project.

ZONING ANALYSIS

ZONING CATEGORY	REQUIRED/ALLOWED	EXISTING	PROPOSED	WAIVER (Y/N)
Minimum Lot Area	10,000 sf	33,150 sf	33,150 sf	N
Lot Frontage (Washington St)	N/A	110'	No change	N
Lot Frontage (Armory St)	N/A	16.06'	No change	N
Lot Coverage	N/A	-	-	N
Front Setback	Lesser of 1/2 building height or average	14.98'	No change	Y
Side Yard Building Setback	Lesser of 1/2 building height or	36.48'	No change	N
Street/Side Yard Parking Setback	Lesser of 1/2 Building height or	N/A	-	N
Rear Yard Building Setback	None	21.10'	No change	N
Building Parking Setback	5.0'	0'	-	N
Building Height	24'	~33'	49'6" / 56'	Y
Maximum Number of Stories	2	2	4	Y
Floor Area Ratio	1	0.56	1.44	Y
Minimum Open Space	N/A	-	-	N
Lot Area per Unit (Square	1,200 sf	-	753 sf	Y

*See Appendix for more detail

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 City officials regarding progress on these milestones.

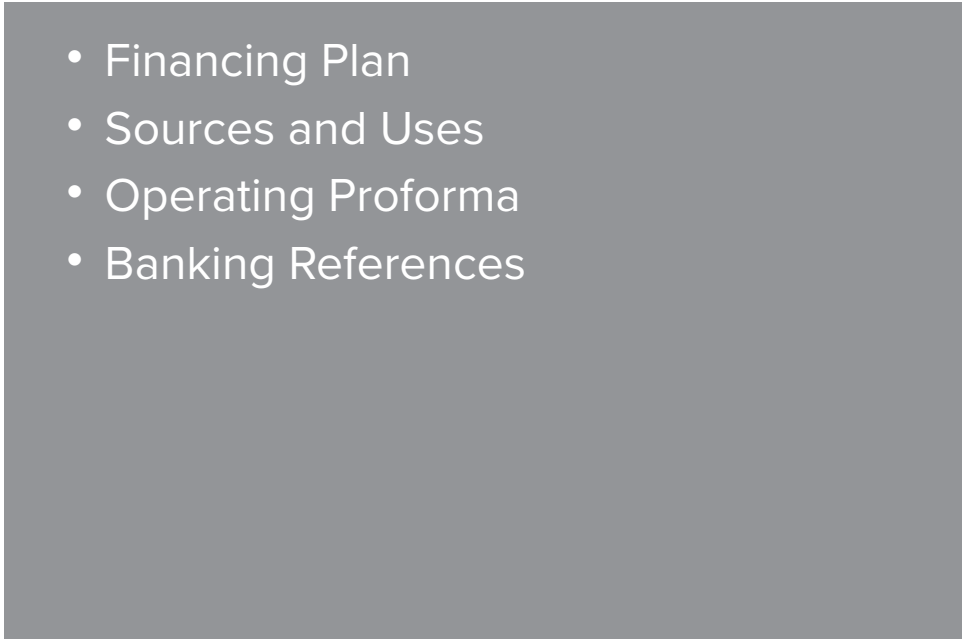
MILESTONE	DATE
Developer designation and execution of Option Agreement Land Disposition Agreement	November – December 2021
Architectural and engineering work commence	December 2021
Presentation of preliminary plans to City boards and department heads	February 2022
Comprehensive permit site eligibility requested from DHCD	March 2022
Submit request to City of Newton for HOME and CPA Funds	March 2022
Submit Mass. Historical Commission Project Notification Form	March 2022
Site eligibility letter received	May 2022
Submit application to Newton ZBA for comprehensive permit	June 2022
Receive comprehensive permit approval	September 2022
Prepare DHCD One Stop application (first submission)	October 2022
Prepare DHCD One Stop application (second submission)	October 2023
DHCD funding decision announced	June 2024
Final construction set of drawings and final pricing. Building permit requested.	November 2024
Construction financing closing and acquisition of site	March 2024
Construction begins	April 2024
Marketing begins	January 2025
Construction substantially complete	April 2024
Occupancy	June 2025



4



Project Financials

- 
- Financing Plan
 - Sources and Uses
 - Operating Proforma
 - Banking References

PROJECT FINANCING PLAN AND POTENTIAL FINANCIAL RESOURCES

Metro West CD, Civico, and the consulting team have the expertise and capacity to manage the affordable housing subsidy process from pre-development through operation. Metro West CD's recent project in Medway, Glen Brook Way Apartments, leveraged many of the same affordable housing subsidies as are proposed for the West Newton Armory. The development of affordable housing in Massachusetts relies on a variety of federal, state, and local resources. Redevelopment of the headhouse and new construction of 43 affordable housing units is made possible by maximizing eligibility for federal and state funding. Our proposal will create 43 affordable rental housing units for a variety of families and individuals by creating one-, two-, and three-bedroom units available to households earning up to 60% area median income (AMI), with a significant portion (35%, or 15 units) to be reserved for households earning up to 30% AMI.

Proposed equity sources are Federal and State Low Income Housing Tax Credits (LIHTC). Proposed subordinate funding sources, which vary in availability each funding round, include the following resources: Affordable Housing Trust Fund (AHTF), HOME, Housing Innovation Fund (HIF), Community Based Housing (CBH), Housing Stabilization Fund (HSF), and Transit Oriented Development (TOD) funds. In order to be eligible for federal and state sources, we are required to secure a local funding match. Finally, we will secure permanent debt.

Federal LIHTC – The LIHTCs are capped at \$250,000 per unit of eligible basis. The maximum annual 9% Federal LIHTC credit available to the project is \$967,500, and we are conservatively budgeting a 90 cent per dollar tax credit raise from an investor.

Massachusetts LIHTC – Based on the current DHCD funding limits, the maximum annual State LIHTC for which we can apply is \$516,000, which is the lesser of \$12,000 per unit or \$700,000 per project. We are conservatively budgeting an 80 cent per dollar tax credit raise from an investor.

HOME – Metro West CD is currently the WestMetro HOME Consortium's only Community Housing Development Organization (CHDO) and therefore, may be able to access CHDO set-aside HOME funds in addition to City of Newton HOME funds for the Armory Redevelopment project.

HSF – Funds support affordable rental housing production and/or rehabilitation. \$1 million is the maximum amount available per project, and per unit limits vary by community. We are eligible for, and anticipate requesting, approximately \$1 million in HSF funds.

HIF – Funds are allocated to developments in which at least 25% of the apartments are affordable to households with incomes below 30% AMI, a threshold which our proposal exceeds. We intend to request the maximum \$500,000 HIF subsidy available per project.

CBH – Funds are targeted toward supporting integrated housing for people with disabilities, including elders, with priority for individuals who are in institutions, nursing facilities, or at risk of institutionalization. This program awards funds up to 50% of the per unit total development costs for the supported units. We expect to provide four CBH-eligible units, which requires the incorporation of specific accessibility enhancements for the sensory impaired. We are eligible for, and anticipate requesting, approximately \$870,000 in CBH funds.



AHTF – Per unit limits are \$50,000, with a per project cap of \$1 million. Funding may take the form of a deferred payment loan or low/no interest amortizing loans. We expect to maximize our request from this program.

TOD – Funding award maximum is \$75,000 per affordable unit. Eligible projects typically must be located within one half mile of a transit hub, including subway station, commuter rail station, bus station, or ferry terminal. Eligible projects may be located up to one mile from a transit hub if they have additional TOD features. The Armory is .6 miles from the West Newton Commuter Rail station and has direct bus service to the stop. Furthermore, the parking ratio of .66:1 is less than one space per unit, and there is ample bicycle infrastructure including Bluebikes, which offers an income-eligible program for riders. We are eligible for, and anticipate requesting, \$886,933 in TOD funds.

Local Funds – Project sponsors are required by DHCD to provide a local financial match if applying for state resources. We allocated \$120,000 per unit from a mix of local resources including local HOME, CDBG, and CPA funds for a total request of \$5.16 million.

Permanent Debt – The balance of the funding is provided by a \$4.8 million amortizing permanent loan secured by the property.

Operating Subsidies – Our operating budget assumes that we will apply for and receive 15 project-based vouchers to support the 15 units restricted at 30% AMI. We plan to apply for 8 Section 8 vouchers and 7 MRVPs, a request that is within the limits stated in the current DHCD Notice of Funding Availability.

Rental Revenue and Operating Expense Assumptions – The 30% AMI unit rents are underwritten based on the program requirements of the applicable rental subsidies. The 60% AMI unit rents are underwritten based on current LIHTC rents for the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR area, with a 5% marketing window and applicable utility allowances. Based on our experience managing comparable affordable housing developments, our operating expense budget reflects approximately \$11,500 per unit per year in expenses.

All State and Federal sources are requested in annual funding rounds held by DHCD. 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.

PERMANENT FINANCING SOURCES	AMOUNT	STATUS
LIHTC Equity (Federal 9%)	\$ 8,706,629	Assuming a 90-cent tax credit raise. Will request credits from DHCD in January 2023 application.
State LIHTC Equity	\$ 2,064,000	Assuming a 80-cent tax credit raise. Will request credits from DHCD in January 2023 application.
State: HSF	\$ 1,000,000	Plan to request in DHCD Funding Round Jan '23
State: HIF	\$ 500,000	Plan to request in DHCD Funding Round Jan '23
State: CBH	\$ 868,110	Plan to request in DHCD Funding Round Jan '23
State: AHTF	\$ 1,000,000	Plan to request in DHCD Funding Round Jan '23
State: TOD	\$ 886,933	Plan to request in DHCD Funding Round Jan '23
City of Newton Local CPA, HOME, CDBG	\$ 5,160,000	Plan to submit request to City of Newton in March 2022
Passive House Incentives	\$ 41,500	Plan to submit for incentives when design work underway in late 2021 / early 2022
Permanent Loan	\$ 4,800,000	LOI from MHP
Total Development Cost	\$ 25,027,172	
Construction Loan	\$ 9,000,000	LOI from Eastern Bank

Section 3 SOURCES AND USES OF FUNDS

Sources of Funds						
Private Equity:			<i>Optional user calculations</i>			
81 . Developer's Cash Equity						
82 . Tax Credit Equity (net amount) (See line 360, Section 5, page 18.)		\$10,770,629				
83 . Developer's Fee/Overhead, Contributed or Loaned						
84 . Other Source: Passive House Incentives		\$41,500				
Public Equity:						
85 . HOME Funds, as Grant		\$				
86 . Grant:		\$				
87 . Grant:		\$				
88 . Total Public Equity		\$0				
Subordinate Debt (see definition):						
	<i>Amount</i>	<i>Rate</i>	<i>Amortiz.</i>	<i>Term</i>		
89 . Home Funds-DHCD, as Subordinate Debt	\$0	%	yrs.	yrs.		
Source:						
90 . Home Funds-Local, as Subordinate Debt	\$5,160,000	%	yrs.	yrs.		
Source: Local HOME, CPA, CDBG						
91 . Subordinate Debt	\$1,000,000	%	yrs.	yrs.		
Source: AHTF						
92 . Subordinate Debt	\$1,368,110	%	yrs.	yrs.		
Source: CBH, HIF						
93 . Subordinate Debt	\$1,886,933	%	yrs.	yrs.		
Source: HSF, TOD						
94 . Total Subordinate Debt	\$9,415,043					
Permanent Debt (Senior):						
	<i>Amount</i>	<i>Rate</i>	<i>Override</i>	<i>Amortiz.</i>	<i>Term</i>	<i>MIP</i>
95 . MHFA MHFA Program 1						
96 . MHFA MHFA Program 2						
97 . MHP Fund Permanent Loan	\$4,800,000	4.50%		30.00	20.00	
98 . Other Permanent Senior Mortgage						
Source:						
99 . Other Permanent Senior Mortgage						
Source:						
100 . Total Permanent Senior Debt	\$4,800,000					
101 . Total Permanent Sources	\$25,027,172					
Construction Period Financing:						
	<i>Amount</i>	<i>Rate</i>	<i>Term</i>			
102 . Construction Loan	\$9,000,000	4.50%	24.0			
Source: Eastern Bank						
Repaid at:						
103 . Other Interim Loan	\$0	%	mos.			
Source:						
Repaid at:						
104 . Syndication Bridge Loan	\$0	%	mos.			
Source:						
Repaid at:						

Application Date: 1/21/22

Revised Date:

Uses of Funds

The Contractor certifies that, to the best of their knowledge, the construction estimates, and trade-item breakdown on this page are complete and accurate.

Direct Construction:

105 . Who prepared the estimates? **Colantonio** Signature

106 . Basis for estimates? **Conceptual Drawings and Comparable Projects**

	DV	Trade Item	Amount	Description
107 .	3	Concrete		
108 .	4	Masonry		
109 .	5	Metals		
110 .	6	Rough Carpentry		
111 .	6	Finish Carpentry		
112 .	7	Waterproofing		
113 .	7	Insulation		
114 .	7	Roofing		
115 .	7	Sheet Metal and Flashing		
116 .	7	Exterior Siding		
117 .	8	Doors		
118 .	8	Windows		
119 .	8	Glass		
120 .	9	Lath & Plaster		
121 .	9	Drywall		
122 .	9	Tile Work		
123 .	9	Acoustical		
124 .	9	Wood Flooring		
125 .	9	Resilient Flooring		
126 .	9	Carpet		
127 .	9	Paint & Decorating		
128 .	10	Specialties		
129 .	11	Special Equipment		
130 .	11	Cabinets		
131 .	11	Appliances		
132 .	12	Blinds & Shades		
133 .	13	Modular/Manufactured		
134 .	13	Special Construction		
135 .	14	Elevators or Conveying Syst.		
136 .	15	Plumbing & Hot Water		
137 .	15	Heat & Ventilation		
138 .	15	Air Conditioning		
139 .	15	Fire Protection		
140 .	16	Electrical		
141 .		Accessory Buildings		
142 .		Other/misc		
143 .		Subtotal Structural	\$0	
144 .	2	Earth Work		
145 .	2	Site Utilities		
146 .	2	Roads & Walks		
147 .	2	Site Improvement		
148 .	2	Lawns & Planting		
149 .	2	Geotechnical Conditions		
150 .	2	Environmental Remediation		
151 .	2	Demolition		
152 .	2	Unusual Site Cond		
153 .		Subtotal Site Work	\$0	
154 .		Total Improvements	\$0	
155 .	1	General Conditions	\$0	
156 .		Subtotal	\$0	
157 .	1	Builders Overhead		
158 .	1	Builders Profit		
159 .		TOTAL	\$17,727,009	

160 Total Cost/square foot: **\$379.98** Residential Cost/s.f.: **\$379.98**

Development Budget:				
	<i>Total</i>	<i>Residential</i>	<i>Commercial</i>	<i>Comments</i>
161 . Acquisition: Land	\$1	\$1		Newton to convey land for \$1
162 . Acquisition: Building	\$0	\$0		
163 . Acquisition Subtotal	\$1	\$1	\$0	
164 . Direct Construction Budget	\$17,727,009	\$17,727,009		(from line 159)
165 . Construction Contingency	\$1,063,621	\$1,063,621		6.0% of construction
166 . Subtotal: Construction	\$18,790,630	\$18,790,630	\$0	
General Development Costs:				
167 . Architecture & Engineering	\$1,258,600	\$1,258,600		
168 . Survey and Permits	\$265,906	\$265,906		Permit fee and utility hook up fee
169 . Clerk of the Works	\$105,400	\$105,400		
170 . Environmental Engineer	\$10,000	\$10,000		
171 . Bond Premium	\$187,906	\$187,906		
172 . Legal	\$167,000	\$167,000		
173 . Title and Recording	\$45,500	\$45,500		
174 . Accounting & Cost Cert.	\$28,400	\$28,400		
175 . Marketing and Rent Up	\$45,000	\$45,000		
176 . Real Estate Taxes	\$40,000	\$40,000		
177 . Insurance	\$90,000	\$90,000		
178 . Relocation	\$0	\$0		
179 . Appraisal	\$27,950	\$27,950		Appraisal and market study
180 . Security	\$0	\$0		
181 . Construction Loan Interest	\$600,000	\$600,000		
182 . Inspecting Engineer	\$33,000	\$33,000		
183 . Fees to: Loan fees	\$84,300	\$84,300		
184 . Fees to: Acq/Predev in	\$91,800	\$91,800		
185 . MIP	\$0	\$0		
186 . FF&E	\$40,428	\$40,428		
187 . Syndication Fee	\$20,000	\$20,000		Syndication fees
188 . Other Financing Fees	\$56,428	\$56,428		LIHTC processing fee
189 . Development Consultant	\$65,000	\$65,000		
190 . Other: Energy Model	\$60,000	\$60,000		Passive House consulting
191 . Other: Construction	\$30,000	\$30,000		
Other: Historic consu	\$20,000	\$20,000		
192 . Soft Cost Contingency	\$168,631	\$168,631		5.0% of soft costs
193 . Subtotal: Gen. Dev.	\$3,541,249	\$3,541,249	\$0	
194 . Subtotal: Acquis., Const. and Gen. Dev.	\$22,331,880	\$22,331,880	\$0	
195 . Capitalized Reserves	\$451,776	\$451,776		
196 . Developer Overhead	\$1,121,758	\$1,121,758		
197 . Developer Fee	\$1,121,758	\$1,121,758		
198 . Total Development Cost	\$25,027,172	\$25,027,172	\$0	TDC per unit \$582,027
199 . TDC, Net	\$24,575,396	\$24,575,396	\$0	TDC, Net per unit \$571,521

0

Application Date: 1/21/22

Revised Date:

Additional Detail on Development Pro-Forma:

200 .	Gross Syndication Investment	\$10,770,629
Off-Budget Costs:		
Syndication Costs:		
201 .	Syndication Legal	
202 .	Syndication Fees	
203 .	Syndication Consultants	
204 .	Bridge Financing Costs	
205 .	Investor Servicing (capitalized)	
206 .	Other Syndication Expenses	
207 .	Total Syndication Expense	\$0
208 .	Current Reserve Balance	
Reserves (capitalized):		
209 .	Development Reserves	
210 .	Initial Rent-Up Reserves	\$60,000
211 .	Operating Reserves	\$391,776
212 .	Net Worth Account	
213 .	Other Capitalized Reserves	
214 .	Subtotal: Capitalized Reserves	\$451,776
215 .	Letter of Credit Requirements	
216 .	Total of the Above	\$451,776

Check: Line 214 is the same as line 195.

Please Answer The Following	Dev. Reserves	Initial Rent-Up	Op. Reserves	Net Worth	Other	Letter of Credit
Who requires the reserves?		Lender and Investor	Lender and Investor			
Who administers the reserves?		Lender	Lender			
When and how are they used?		to pay costs during lease up	to pay operating deficits			
Under what circumstances can they be released?		at repayment of perm loan	at repayment of perm loan			

Unit Sales (For Sale Projects Only):

217 .	Gross Sales From Units	\$
218 .	Cost of Sales (Commissions, etc.)	\$
219 .	Net Receipt from Sales	\$0

Debt Service Requirements:

220 .	Minimum Debt Service Coverage	1.20
221 .	Is this Project subject to HUD Subsidy Layering Review?	Yes

Optional user comments

Section 4 OPERATING PRO-FORMA

Operating Income					
Rent Schedule:		<i>Contract</i>	<i>Utility</i>	<i>Total</i>	<i>No. of</i>
		<i>Rent</i>	<i>Allowance</i>	<i>Gross Rent</i>	<i>Units</i>
222 .	Low-Income (Rental Assisted @ 30% AMI):				
	SRO			\$0	0
	0 bedroom			\$0	0
	1 bedroom MRVP	\$1,510	\$0	\$1,510	4
	2 bedrooms MRVP	\$1,812	\$0	\$1,812	2
	3 bedrooms MRVP	\$2,094	\$0	\$2,094	1
	4 bedrooms			\$0	0
223 .	Low-Income (below 50%):				
	SRO			\$0	0
	0 bedroom			\$0	0
	1 bedroom			\$0	0
	2 bedrooms			\$0	0
	3 bedrooms			\$0	0
	4 bedrooms			\$0	0
224 .	Low-Income (below 60%):				
	SRO			\$0	0
	0 bedroom			\$0	0
	1 bedroom	\$1,365	\$70	\$1,435	11
	2 bedrooms	\$1,622	\$99	\$1,721	13
	3 bedrooms	\$1,872	\$117	\$1,989	4
	4 bedrooms			\$0	0
225 .	Other Income 30%	Below 30% of the median income for the region			
	SRO			\$0	0
	0 bedroom			\$0	0
	1 bedroom			\$0	0
	2 bedrooms Section 8	\$2,437	\$133	\$2,570	6
	3 bedrooms Section 8	\$3,037	\$160	\$3,197	2
	4 bedrooms			\$0	0
226 .	Market Rate (unrestricted occupancy):				
	SRO				0
	0 bedroom				0
	1 bedroom				0
	2 bedrooms				0
	3 bedrooms				0
	4 bedrooms				0
Commercial Income:			(average)		
227 .	Square Feet: <input style="width: 100px;" type="text" value="0"/>	@	<input style="width: 100px;" type="text" value=""/>	/square foot =	<input style="width: 100px;" type="text" value="\$0"/>
Parking Income:			(average)		
228 .	Spaces: <input style="width: 100px;" type="text" value="31"/>	@	<input style="width: 100px;" type="text" value=""/>	/month x 12 =	<input style="width: 100px;" type="text" value="\$0"/>

Application Date: 1/21/22

Revised Date:

Operating Expenses				
Annual Operating Exp.:	<i>Total</i>	<i>Residential</i>	<i>Commercial</i>	<i>Comments</i>
250 . Management Fee	\$42,820	\$42,820		
251 . Payroll, Administrative	\$10,000	\$10,000		
252 . Payroll Taxes & Benefits, Admin.	\$34,583	\$34,583		Manager's Payroll
253 . Legal	\$2,917	\$2,917		
254 . Audit	\$12,500	\$12,500		
255 . Marketing	\$833	\$833		
256 . Telephone	\$2,083	\$2,083		
257 . Office Supplies	\$8,210	\$8,210		cludes copy machine, postage and traini
258 . Accounting & Data Processing	\$1,667	\$1,667		
259 . Investor Servicing	\$1,250	\$1,250		
260 . DHCD Monitoring Fee	\$1,290	\$1,290		
261 . Other: Bad Debt & Bank Charges	\$5,842	\$5,842		
262 . Other: Misc/Asset Management Fee	\$7,500	\$7,500		
263 . Subtotal: Administrative	\$88,675	\$88,675	\$0	
264 . Payroll, Maintenance	\$40,416	\$40,416		incl Maint Payroll supervisor
265 . Payroll Taxes & Benefits, Admin.	\$12,500	\$12,500		cleaning payroll or contract + supplies
266 . Janitorial Materials	\$8,333	\$8,333		
267 . Landscaping	\$6,250	\$6,250		
268 . Decorating (inter. only)	\$6,250	\$6,250		
269 . Repairs (inter. & ext.)	\$8,333	\$8,333		
270 . Elevator Maintenance	\$5,000	\$5,000		
271 . Trash Removal	\$6,250	\$6,250		
272 . Snow Removal	\$4,167	\$4,167		
273 . Extermination	\$3,000	\$3,000		
274 . Recreation	\$0	\$0		Security Supplies
275 . Other: Misc.	\$2,708	\$2,708		incl Motor Vehicle Exp, Lock&Key Exp
276 . Subtotal: Maintenance	\$103,207	\$103,207	\$0	
277 . Resident Services	\$25,800	\$25,800		
278 . Security	\$1,250	\$1,250		
279 . Electricity	\$19,350	\$19,350		
280 . Natural Gas	\$14,545	\$14,545		
281 . Oil	\$0	\$0		
282 . Water & Sewer	\$19,091	\$19,091		
283 . Subtotal: Utilities	\$52,986	\$52,986	\$0	
284 . Replacement Reserve	\$13,975	\$13,975		
285 . Operating Reserve	\$0			
286 . Real Estate Taxes	\$95,000	\$95,000		
287 . Other Taxes	\$0	\$0		
288 . Insurance	\$38,700	\$38,700		
289 . MIP	\$0	\$0		
290 . Other:	\$29,288	\$29,288		Health insurance and other benefits
291 . Subtotal:Taxes, Insurance	\$162,988	\$162,988	\$0	
292 . TOTAL EXPENSES	\$491,701	\$491,701	\$0	

Other Operating Expense Assumptions

Trending Assumptions for Expenses

	Year 2	Year 3	Years 4-5	Years 6-20
293 . Sewer & Water	3.0%	3.0%	3.0%	3.0%
294 . Real Estate Taxes	3.0%	3.0%	3.0%	3.0%
295 . All Other Operating Expenses	3.0%	3.0%	3.0%	3.0%

Reserve Requirements:

296 . Replacement Reserve Requirement	\$325.00	per unit per year
297 . Operating Reserve Requirement		per unit per year

Debt Service:

		Annual Payment
298 . MHFA	MHFA Program 1	N/A
299 . MHFA	MHFA Program 2	N/A
300 . MHP Fund Permanent Loan		\$291,851
301 . Other Permanent Senior Mortgage		N/A
	Source: N/A	
302 . Other Permanent Senior Mortgage		N/A
	Source: N/A	
303 . Total Debt Service (Annual)		\$291,851
304 . Net Operating Income		\$364,728 (in year one)
305 . Debt Service Coverage		1.25 (in year one)

Affordability: Income Limits and Maximum Allowable Rents

306 . County MSA Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area

307 . **Maximum Allowed Rents, by Income, by Unit Size:** Income Limits last updated on 3/12/2012

	Maximum Income			Maximum Rent (calculated from HUD income data)		
	50%	60%	30%	50%	60%	30%
SRO	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
0 bedroom	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
1 bedroom	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
2 bedrooms	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
3 bedrooms	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
4 bedrooms	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A

Area median income for a family of #N/A

308 . **H.U.D. "Fair Market Rents" (Maximum):**

0 bedroom	#N/A
1 bedroom	#N/A
2 bedrooms	#N/A
3 bedrooms	#N/A
4 bedrooms	#N/A
5 bedrooms	#N/A

FMR Information last updated on 3/12/2012

0

Application Date: 1/21/22

Revised Date:

Operations before this transaction:				Operations after:			
Type	Number	Current Rent	Annualized Income	Number	Future Rents	Market Rent GPR	
309 . SRO	0	0	0	0	0	0	0
310 . 0 bedroom	0	0	0	0	0	0	0
311 . 1 bedroom	15	0	0	0	0	0	0
312 . 2 bedrooms	21	0	0	0	0	0	0
313 . 3 bedrooms	7	0	0	0	0	0	0
314 . 4 bedrooms	0	0	0	0	0	0	0
315 . Gross Potential Rental Income			0				0
316 . Vacancy		0%	0	Vacancy	6%		0
317 . Other Income			0	Other Income			0
318 . Effective Gross Income			0	Effective Gross Income			0
Operating Expenses			Year	Reason	% Change		Year
319 . Management fee			0				0
320 . Administration			0				0
321 . Maintance/Operations			0				0
322 . Resident Services			0				0
323 . Security			0				0
324 . Utilities			0				0
325 . Replacement Reserve			0				0
326 . Operating Reserve			0				0
327 . Real Esate Taxes			0				0
328 . Insurance			0				0
329 . Total Expenses			0				0
330 . Net Operating Income			0	Net Operating Income			0
331 . Transaction Description:							
<i>Optional user calculations</i>							

0

Application Date: 1/21/22

Revised Date:

Amortization Table #3

MHP Fund Permanent Loan

Principal	4,800,000
Interest	4.50%
Amoritization	30
Term	20
Override	0.00%
Debt Service Payment	291,851
Loan Constant	0
Year	1900

Override Fee

0

Year	Beginning balance	Interest	Principal	Ending balance	Remaining amortization	Remaining term	MIP	Total Debt Service
1900	4,800,000	214,416	77,435	4,722,565	348	228	0.000%	291,851
1901	4,722,565	210,859	80,992	4,641,573	336	216	-	291,851
1902	4,641,573	207,138	84,713	4,556,860	324	204	-	291,851
1903	4,556,860	203,246	88,605	4,468,255	312	192	-	291,851
1904	4,468,255	199,176	92,675	4,375,580	300	180	-	291,851
1905	4,375,580	194,918	96,933	4,278,647	288	168	-	291,851
1906	4,278,647	190,465	101,386	4,177,262	276	156	-	291,851
1907	4,177,262	185,807	106,043	4,071,218	264	144	-	291,851
1908	4,071,218	180,936	110,915	3,960,303	252	132	-	291,851
1909	3,960,303	175,840	116,010	3,844,293	240	120	-	291,851
1910	3,844,293	170,511	121,340	3,722,953	228	108	-	291,851
1911	3,722,953	164,937	126,914	3,596,039	216	96	-	291,851
1912	3,596,039	159,106	132,745	3,463,294	204	84	-	291,851
1913	3,463,294	153,008	138,843	3,324,451	192	72	-	291,851
1914	3,324,451	146,629	145,221	3,179,230	180	60	-	291,851
1915	3,179,230	139,958	151,893	3,027,337	168	48	-	291,851
1916	3,027,337	132,980	158,871	2,868,466	156	36	-	291,851
1917	2,868,466	125,682	166,169	2,702,297	144	24	-	291,851
1918	2,702,297	118,048	173,803	2,528,494	132	12	-	291,851
1919	2,528,494	110,063	181,787	2,346,707	120	-	-	291,851
1920	-	-	-	-	108	-	-	-
1921	-	-	-	-	96	-	-	-
1922	-	-	-	-	84	-	-	-
1923	-	-	-	-	72	-	-	-
1924	-	-	-	-	60	-	-	-
1925	-	-	-	-	48	-	-	-
1926	-	-	-	-	36	-	-	-
1927	-	-	-	-	24	-	-	-
1928	-	-	-	-	12	-	-	-
1929	-	-	-	-	-	-	-	-
1930	-	-	-	-	-	-	-	-
1931	-	-	-	-	-	-	-	-
1932	-	-	-	-	-	-	-	-
1933	-	-	-	-	-	-	-	-
1934	-	-	-	-	-	-	-	-
1935	-	-	-	-	-	-	-	-
1936	-	-	-	-	-	-	-	-
1937	-	-	-	-	-	-	-	-
1938	-	-	-	-	-	-	-	-
1939	-	-	-	-	-	-	-	-
1940	-	-	-	-	-	-	-	-

**Newton Armory
20-Year Cash Flow**

REVENUE	Escalator	1	2	3	4	5	6	7	8
Rental Income									
Gross Rental Income - Vouchers	2.0%	389,410	397,198	405,142	413,245	421,509	429,940	438,538	447,309
Gross Rental Income - Others	2.0%	459,054	468,235	477,600	487,152	496,895	506,833	516,969	527,309
Res Vacancy - MRVP/S8	5%	(19,470)	(19,860)	(20,257)	(20,662)	(21,075)	(21,497)	(21,927)	(22,365)
Res Vacancy - Others	5%	(22,953)	(23,412)	(23,880)	(24,358)	(24,845)	(25,342)	(25,848)	(26,365)
TOTAL EFFECTIVE INCOME		806,040	822,161	838,604	855,377	872,484	889,934	907,732	925,887
EXPENSES		1	2	3	4	5	6	7	8
Operating Expenses									
Renting Expenses	3.0%	40,302	41,108	41,930	42,769	43,624	44,497	45,387	46,294
Administrative Expenses	3.0%	71,590	73,738	75,950	78,228	80,575	82,992	85,482	88,047
Operating & Maintenance Expense	3.0%	109,042	112,313	115,682	119,153	122,727	126,409	130,201	134,107
Utility Expense	3.0%	52,986	54,576	56,213	57,900	59,637	61,426	63,268	65,167
Resident Services	3.0%	25,800	26,574	27,371	28,192	29,038	29,909	30,807	31,731
Asset Management Fee	3.0%	7,500	7,725	7,957	8,195	8,441	8,695	8,955	9,224
Property/RE Taxes	3.0%	95,000	97,850	100,786	103,809	106,923	110,131	113,435	116,838
Insurance and Other Taxes	3.0%	66,338	68,328	70,377	72,489	74,663	76,903	79,210	81,587
Replacement Reserves	3.0%	13,975	14,394	14,826	15,271	15,729	16,201	16,687	17,187
TOTAL EXPENSES		482,533	496,606	511,093	526,006	541,359	557,163	573,433	590,182
NET OPERATING INCOME		323,508	325,556	327,512	329,370	331,126	332,771	334,299	335,705
DEBT SERVICE		(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)
DSCR		1.24	1.25	1.25	1.26	1.27	1.27	1.28	1.28
NET CASH FLOW		62,058	64,106	66,062	67,921	69,676	71,321	72,850	74,255

9	10	11	12	13	14	15	16	17	18	19	20
456,255	465,381	474,688	484,182	493,866	503,743	513,818	524,094	534,576	545,267	556,173	567,296
537,855	548,612	559,584	570,776	582,191	593,835	605,712	617,826	630,183	642,786	655,642	668,755
(22,813)	(23,269)	(23,734)	(24,209)	(24,693)	(25,187)	(25,691)	(26,205)	(26,729)	(27,263)	(27,809)	(28,365)
(26,893)	(27,431)	(27,979)	(28,539)	(29,110)	(29,692)	(30,286)	(30,891)	(31,509)	(32,139)	(32,782)	(33,438)
944,405	963,293	982,559	1,002,210	1,022,254	1,042,699	1,063,553	1,084,824	1,106,521	1,128,651	1,151,224	1,174,249
9	10	11	12	13	14	15	16	17	18	19	20
47,220	48,165	49,128	50,110	51,113	52,135	53,178	54,241	55,326	56,433	57,561	58,712
90,688	93,409	96,211	99,097	102,070	105,132	108,286	111,535	114,881	118,327	121,877	125,533
138,131	142,275	146,543	150,939	155,467	160,131	164,935	169,883	174,980	180,229	185,636	191,205
67,122	69,135	71,209	73,346	75,546	77,812	80,147	82,551	85,028	87,578	90,206	92,912
32,683	33,663	34,673	35,713	36,785	37,888	39,025	40,196	41,401	42,643	43,923	45,240
9,501	9,786	10,079	10,382	10,693	11,014	11,344	11,685	12,035	12,396	12,768	13,151
120,343	123,953	127,672	131,502	135,447	139,511	143,696	148,007	152,447	157,021	161,731	166,583
84,034	86,555	89,152	91,827	94,581	97,419	100,341	103,352	106,452	109,646	112,935	116,323
17,703	18,234	18,781	19,345	19,925	20,523	21,138	21,773	22,426	23,099	23,792	24,505
607,425	625,175	643,449	662,261	681,628	701,565	722,091	743,222	764,976	787,372	810,429	834,166
336,980	338,118	339,110	339,949	340,626	341,134	341,462	341,602	341,545	341,279	340,795	340,082
(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)	(261,450)
1.29	1.29	1.30	1.30	1.30	1.30	1.31	1.31	1.31	1.31	1.30	1.30
75,531	76,668	77,660	78,499	79,177	79,684	80,013	80,153	80,095	79,829	79,345	78,633



September 28, 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 existing historic head house of the Newton Armory site's redevelopment for 43-units of affordable housing in Newton, 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



September 27, 2021

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

RE: Newton Armory RFQ

Dear Jennifer:

The Massachusetts Housing Partnership (MHP) is pleased to support Metro-West Community Development's response to the City of Newton's RFP for the Newton Armory site in partnership with Civico.

MHP is a statewide public non-profit organization that supports and finances affordable housing. Our organization works with communities to create innovative policy and financing solutions that provide affordable homes and better lives for the people in the Commonwealth.

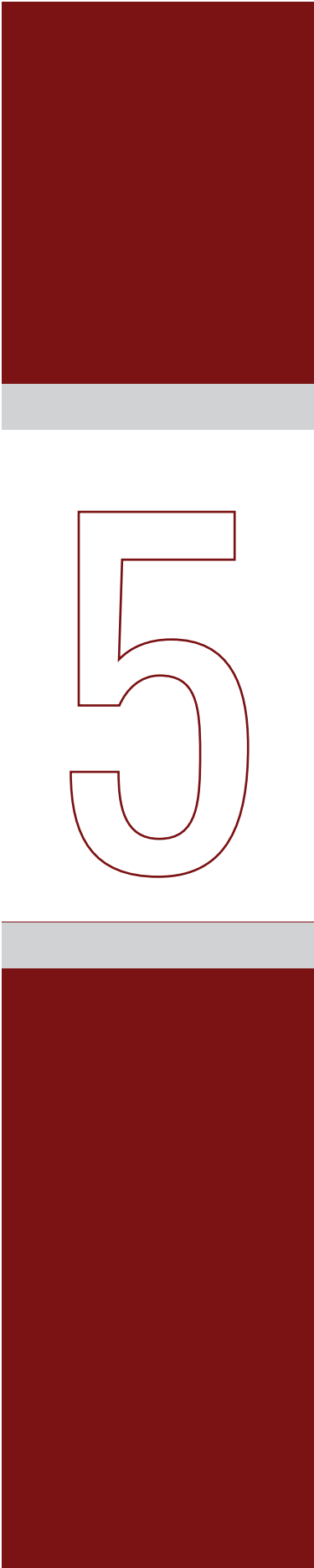
MHP will be the first mortgage lender in the amount of \$5,025,000 on the first phase of a 48 unit affordable housing development in 4 building located in Medway, MA called Glen Brook Way Phase 1. MHP received Board approval for this permanent loan in April 2020, locked the permanent interest rate in August 2020 and anticipate closing on the permanent loan in Spring 2022. As a condition for loan approval and rate lock, MHP performed due diligence on both the project and Metro-West CD and found both to be satisfactory. We found Metro-West to have the capacity and expertise to assemble over 8 sources of financing for Glen Brook Way and oversee the construction process.

MHP would be interested in providing permanent financing for the Newton Armory should your team receive developer designation. MHP values our relationship with Metro-West CD and the work you do to develop affordable housing in communities of opportunity. Please keep me informed of your progress with the Newton Armory and best of luck with your RFP submission.

Sincerely,

Alma Balonon-Rosen

Alma Balonon-Rosen
Senior Relationship Manager
Almabr@mhp.net
Phone 1-857-317-8578



5



Required Proposal Contract Forms

- Exhibit 1 - Technical Proposal Cover Sheet
- Exhibit 2 - Bidders Qualifications Form
- Exhibit 3 - Certificate of Non-Collusion
- Exhibit 4 - Certificate of Tax Compliance
- Exhibit 5 - Certificate of Foreign Corporation
- Exhibit 6 - Debarment Clause
- Exhibit 7 - Taxpayer ID Form

EXHIBIT 1

TECHNICAL PROPOSAL COVER SHEET
RFP #21-79 for Newton Armory Affordable Housing Development

This form must be completed and placed, within your Technical Proposal and ensure your envelope is marked:

"TECHNICAL PROPOSAL: RFP #21-79 for Newton Armory Affordable Housing Development"

- A. The undersigned proposes to furnish all supplies accordance with the Project Manual prepared by the City entitled:

NEWTON ARMORY AFFORDABLE HOUSING DEVELOPMENT

This proposal includes addenda number(s) 1, 2, _____, _____,

The following documents, completed and executed, are submitted herewith:

1. Technical Proposal Cover Sheet (Exhibit 1)
2. Bidder's Qualifications & Reference Form (Exhibit 2), 2 pages
3. Certificate of Non-Collusion (Exhibit 3), 1 page
4. Certification of Tax Compliance (Exhibit 4), 1 page
5. Certificate of Foreign Corporation (if applicable) (Exhibit 5), 1 page
6. Debarment Letter (Exhibit 6), 1 page
7. IRS Form W-9 (Exhibit 7), 1 page

Name of Proposer: Metro West Collaborative Development, Inc.

Address: 79-B Chapel St. Newton MA 02458

Telephone: 617 923-3505

Signature of Duly Authorized Representative of Proposer:

Signature:



Name:

Jennifer Van Camp

(Please print clearly)

Title:

Executive Director

Dated:

9/28/21

EXHIBIT 2

CITY OF NEWTON

BIDDER'S QUALIFICATIONS AND REFERENCES FORM

All questions must be answered, and the data given must be clear and comprehensive. Please type or print legibly. If necessary, add additional sheet for starred items. This information will be utilized by the City for purposes of determining bidder responsiveness and responsibility with regard to the requirements and specifications of the Contract.

1. FIRM NAME: Metro West Collaborative Development, Inc.

2. WHEN ORGANIZED: 1990

3. INCORPORATED? YES NO DATE 5/21/1990 AND STATE OF INCORPORATION: MA

4. IS YOUR BUSINESS A MBE? YES NO WBE? YES NO or MWBE? YES NO

* 5. LIST ALL CONTRACTS CURRENTLY ON HAND, SHOWING CONTRACT AMOUNT AND ANTICIPATED DATE OF COMPLETION:

Town of Hudson \$100 2024

* 6. HAVE YOU EVER FAILED TO COMPLETE A CONTRACT AWARDED TO YOU?
YES NO
IF YES, WHERE AND WHY?

* 7. HAVE YOU EVER DEFAULTED ON A CONTRACT? YES NO
IF YES, PROVIDE DETAILS.

* 8. LIST YOUR VEHICLES/EQUIPMENT AVAILABLE FOR THIS CONTRACT: Not applicable

* 9. IN THE SPACES FOLLOWING, PROVIDE INFORMATION REGARDING CONTRACTS COMPLETED BY YOUR FIRM SIMILAR IN NATURE TO THE PROJECT BEING BID. A MINIMUM

OF FOUR (4) CONTRACTS SHALL BE LISTED. PUBLICLY BID CONTRACTS ARE PREFERRED, BUT NOT MANDATORY.

PROJECT NAME: Hudson Police Station Redevelopment
OWNER: Town of Hudson
CITY/STATE: Hudson MA
DOLLAR AMOUNT: \$100 DATE COMPLETED: anticipated 2024
PUBLICLY BID? YES NO
TYPE OF WORK?: redevelopment of site into 40 units of affordable housing
CONTACT PERSON: Kristina Johnson TELEPHONE#: (978)562-2989
CONTACT PERSON'S RELATION TO PROJECT?: Director of Community Dev. for Town
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: Norwell Police Station Redevelopment
OWNER: Norwell Affordable Housing Trust
CITY/STATE: Norwell MA
DOLLAR AMOUNT: \$100 DATE COMPLETED: November 2019
PUBLICLY BID? YES NO
TYPE OF WORK?: redevelopment of site into 18 units of affordable housing
CONTACT PERSON: Gregg McBride TELEPHONE#: greggmcbriidenorwell@gmail.com
CONTACT PERSON'S RELATION TO PROJECT?: Member Affordable Housing Trust during project
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: Glen Brook Way
OWNER: Glen Brook Way Apartments LLC
CITY/STATE: Medway MA
DOLLAR AMOUNT: \$20 million DATE COMPLETED: anticipated Nov. 2021
PUBLICLY BID? YES NO
TYPE OF WORK?: new construction of 48 multi-family rental units
CONTACT PERSON: Barbara St. Andre TELEPHONE#: (508)321-4918
CONTACT PERSON'S RELATION TO PROJECT?: Director of Community Dev. For town
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: 236 Auburn St., Newton
OWNER: CAN-DO
CITY/STATE: Newton MA
DOLLAR AMOUNT: \$4.1 million DATE COMPLETED: March 2020
PUBLICLY BID? YES NO
TYPE OF WORK?: historic renovation of single family house and new construction of 2 additional buildings for eight units of affordable housing
CONTACT PERSON: Amy Zarechian TELEPHONE#: (617)552-5501
CONTACT PERSON'S RELATION TO PROJECT?: current owner of property
(i.e., contract manager, purchasing agent, etc.)

10. The undersigned certifies that the information contained herein is complete and accurate and hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the City in verification of the recitals comprising this statement of Bidder's qualifications and experience.

DATE: 9/28/21 BIDDER: Metro West Collaborative Development, Inc.

SIGNATURE: 

PRINTED NAME: Jennifer Van Campen TITLE: Executive Director

EXHIBIT3

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and 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 or individuals.



(Signature of individual)

Metro West Collaborative Dev., Inc.
Name of Business

EXHIBIT 4

CERTIFICATION OF TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A and requirements of the City, the undersigned acting on behalf of the Contractor certifies under the penalties of perjury that the Contractor is in compliance with all laws of the Commonwealth relating to taxes including payment of all local taxes, fees, assessments, betterments and any other local or municipal charges (unless the Contractor has a pending abatement application or has entered into a payment agreement with the entity to which such charges were owed), reporting of employees and contractors, and withholding and remitting child support.*

**Signature of Individual (Mandatory)

*** Contractor's Social Security Number
(Voluntary) or Federal Identification Number

Print Name: _____

Date: _____

OR

Metro West Collaborative Dev., Inc.

Company Name

(Corporation, Partnership, LLC, etc.)

By: _____
**Corporate Officer (Mandatory)

Print Name: Suyeeah John

Date: 9/28/21

* The provision in this Certification relating to child support applies only when the Contractor is an individual.

** Approval of a contract or other agreement will not be granted until the City receives a signed copy of this Certification.

*** Your social security number may 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.

Not Applicable

CERTIFICATE OF FOREIGN CORPORATION

The undersigned hereby certifies that it has been duly established, organized, or chartered as a corporation under the laws of:

(Jurisdiction)

The undersigned further certifies that it has complied with the requirements of M.G.L. c. 30, §39L (if applicable) and with the requirements of M.G.L. c. 156D, §15.03 relative to the registration and operation of foreign corporations within the Commonwealth of Massachusetts.

Name of person signing proposal

Signature of person signing proposal

Name of Business (Please Print or Type)

Affix Corporate Seal here

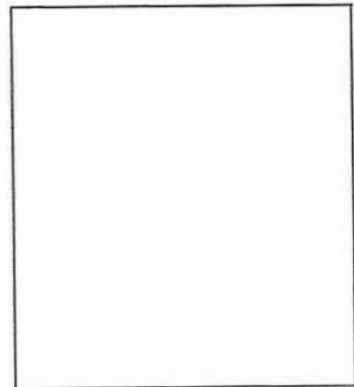


EXHIBIT 6



Mayor
Ruthanne Fuller

Purchasing Department
Nicholas Read@ *Chief Procurement Officer*
1000 Commonwealth Avenue
Newton Centre, MA 02459-1449
purchasing@newtonma.gov

Telephone
(617) 796-1220
Fax:
(617) 796-1227
TDD/TTY
(617) 796-1089

Vendor

Re: Debarment Letter for Invitation For Bid #21-79

As a potential vendor on the above contract, the City requires that you provide a debarment/suspension certification indicating that you are in compliance with the below Federal Executive Order. Certification can be done by completing and signing this form.

Section 1.01 Debarment:

Federal Executive Order (E.O.) 12549 "Debarment and Suspension" requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government.

I hereby certify under pains and penalties of perjury that neither I nor any principal(s) of the Company identified below is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Jennifer Van Campen, Executive Director (Name)
Metro West Collaborative Development, Inc. (Company)
79-B Chapel St. (Address)
Newton, MA 02458 (Address)

PHONE 617-923-3505 x 4 FAX 617-923-8241
EMAIL jvc@metrowestcd.org

Signature
7/28/29 Date

.If you have questions, please contact Nicholas Read, Chief Procurement Officer at (617) 796-1220.

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Metro West Collaborative Development, Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC C Corporation S Corporation Partnership Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ **non-profit corporation**

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
79-B Chapel St.

6 City, state, and ZIP code
Newton, MA 02458

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type. See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

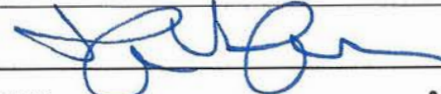
Social security number									
or									
Employer identification number									
2	2	-	3	0	7	3	6	6	8

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶  Date ▶ **9/28/21**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.


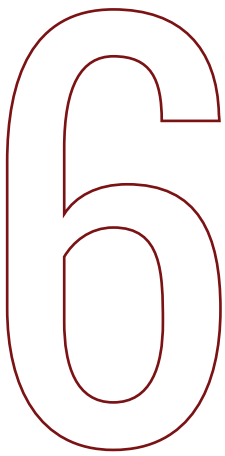

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*



6



Appendix

- 
- Metro West Collaborative Development
 - Civico Development, LLC
 - Maloney Properties, Inc.
 - Davis Square Architects, Inc.
 - Nitsch Engineering, Inc.
 - RBLA Design, LLC
 - Lambert Sustainability
 - Klein Hornig, LLP
 - Public Archeology Lab
 - Terrence Morris
 - Colontonio Inc
 - Additional Information
 - References

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

CAITLIN MADDEN

Metro West Collaborative Development
caitlin@metrowestcd.org
617.923.3505 x 6

EDUCATION	UNIVERSITY OF MICHIGAN Stephen M. Ross School of Business Master of Business Administration, Emphasis in Real Estate, May 2015	Ann Arbor, MI
	UNIVERSITY OF DENVER Bachelor of Arts, Sociology, Magna cum Laude, August 2008	Denver, CO
CURRENT POSITION	METRO WEST COLLABORATIVE DEVELOPMENT Deputy Director <ul style="list-style-type: none">• Collaborate with the Executive Director on organizational growth and development• Initiate and manage real estate development projects and manage related staff, consultants, and interns• Work with lenders, investors, and government agencies to secure complex debt and equity project financing including state and federal LIHTCs, state subsidy funds, and state and federal historic tax credits• Oversee the construction of real estate projects including Glen Brook Way, a two-phase 92-unit development in Medway, MA	Newton, MA
PROJECT EXPERIENCE		Boston, MA
2018- 2021	URBAN EDGE Senior Project Manager <ul style="list-style-type: none">• 1599 Columbus Avenue: 65-unit 100% affordable new construction building including 3,100 SF of commercial space. Pursuing Passive House certification• Bancroft Dixwell: 78-unit scattered site occupied rehab, including 5 historic buildings	
2015-2018	PLANNING OFFICE FOR URBAN AFFAIRS (POUA) Project Manager <ul style="list-style-type: none">• 48 Boylston Historic Rehabilitation: 46 units of affordable housing + 10k SF commercial space. Successfully completed permitting, zoning, DHCD financing application, and construction closing for an adaptive reuse of an individually listed historic building• 48 Boylston New Construction: managed early schematic, permitting, and financial feasibility phase for a mixed-income 19 story new construction tower• Safe Haven: worked with the Boston Mayor's Office, Attorney General's office, and a service provider to acquire and rehabilitate a building to serve as emergency transitional housing available for victims of human trafficking	Boston, MA
2014	BEACON COMMUNITIES LLC Development and Acquisitions Intern <ul style="list-style-type: none">• Performed due diligence for purchase of 204 unit mixed-income multi-family community in Amherst, Massachusetts; worked with management to facilitate acquisition transition• Attended new construction + substantial rehab development meetings + site visits for potential acquisitions• Performed analysis of development costs for 15 most recent development projects to identify trends and more accurately estimate costs for future projects	Boston, MA
2011-2013	TELESIS CORPORATION Executive Assistant to the President <ul style="list-style-type: none">• Assisted the President of a private for-profit affordable housing development organization with real estate development acquisition, zoning and permitting, and financing efforts• Served as liaison between President and the property management team to address potential issues, proactively reduce vacancy, and maintain LIHTC compliance	Washington, DC
ADDITIONAL	Former youth counselor at co-ed group home for at-risk teenagers. Lover of running, the outdoors, and historic buildings.	



Andrew Consigli

CIVICO MANAGING PARTNER

617.646.9020

aconsigli@civicodevelopment.com



CAREER SUMMARY

Andrew Consigli’s career in the real estate industry spans more than 20-years from architectural design, urban and town center planning, to development and construction of complex mixed-use projects. He founded Civico to provide towns and cities with the collaborative partner they need to create authentic and contextually-sensitive places. Andrew’s background is in commercial construction, having been raised around the family business, Consigli Construction Company. Andrew will be primarily responsible for urban design and the management of the architecture, landscape architecture, and civil engineering consultants. Andrew will manage construction for Beal Commons.

EDUCATION

Bachelor of Architecture
Wentworth Institute of Technology
Bachelor of Building Construction
Wentworth Institute of Technology
Certification in Retail Planning
Harvard Executive Education School

AFFILIATIONS

Member - Boston Society of Architects
Member - American Institute of Architects
Member - Congress for the New Urbanism
Board Member - Sustainable Comfort, Inc
LEED AP

SELECTED EXPERIENCE

Oriole Landing | Lincoln, MA
2018 - 2020

Project Cost: \$21MM

Andrew led the permitting, design, and development of a 60-unit mixed income rental community in Lincoln, MA. Oriole Landing was made possible through a public-private partnership with the Town of Lincoln Affordable Housing Trust, having been awarded one million dollars to support 25% affordability. The team also worked extensively with the Town of Lincoln Historical Commission to preserve a historic farmhouse on the property, creating a common garden house for residents.



Abbey Road | Sherborn, MA
2015 - 2018

Project Cost: \$10MM

Abbey Road is a pocket neighborhood in the town’s historic center. Andrew led the permitting, design, and development of an 18-unit luxury condominium community in Sherborn, MA. Abbey Road was permitted by passing a zone change at Town Meeting, and involved a land swap with the Town of Sherborn. An award-winning community and a LEED for Homes Certified project, Abbey Road exemplifies Civico’s contextually-sensitive approach to infill development. Civico repurposed two historic buildings on the site, including a historic library and the Peace Abbey, a multi-faith retreat center.



Ace Flats | Reading, MA
2017 - 2020

Project Cost: \$21MM

Andrew led the adaptive reuse of a historic turn-of-the-century office building into a 55-unit mixed-use project with 3,500 square feet of retail. Ace Flats was supported by a soft loan from the Department of Housing and Community Development to create affordable units for residents.





Taylor Bearden

CIVICO MANAGING PARTNER

617.646.9020

tbearden@civicodevelopment.com



CAREER SUMMARY

Taylor Bearden has a diverse background in property management, operations, planning and zoning, and development. His primary responsibilities as Partner are for deal sourcing, partnership outreach, and project development. Taylor was the founder and former president of WalkerThomas, a real estate consulting, management, and brokerage firm that was acquired in 2019. He previously worked as VP of Operations for Sustainable Comfort, Inc. (SCI), where he is now a member of the Board of Directors. SCI is a growing green building consulting, design, and construction management company headquartered in Worcester. Taylor has a comprehensive understanding of the dynamic nature of development and will be responsible for public relations and zoning and permitting Beal Commons.

EDUCATION

B.A. Geography | Clark University
M.A. Community Development & Planning | Clark University ('21)

AFFILIATIONS

Member- Congress for the New Urbanism
Board Member - Sustainable Comfort, Inc.
Fellow - MassDevelopment Emerging Developers Cohort
Fellow - StartUp Worcester

SELECTED EXPERIENCE

Bell Hill Opportunity Fund | Worcester, MA
2017- 2021
Project Cost: \$14MM

The Bell Hill Opportunity Fund is a progressive renovations-focused community development fund focused on an emerging neighborhood in Worcester. The Fund repositions historic multifamily housing by designing for today's emerging professionals, engineering for energy efficiency, and renovating for longevity. To date the Fund has stabilized over 75 scattered site units in a clustered pocket neighborhood in Bell Hill. Taylor is a General Partner responsible for site selection, deal structure, negotiation, and community engagement.



Kettlebrook Cottages | Worcester, MA
2018- present
Project Cost: \$4.5MM

This unique project is a collaboration between Civico and Worcester East Side Community Development Corporation. The Kettlebrook Cottages are a multi-stakeholder project designed to provide perpetually affordable housing for Worcester's chronically homeless. 21 tiny homes will be clustered around a common house in an educational campus abutting conservation land. The project is in pre-development and was recently endorsed by the Department of Mental Health, City of Worcester, and Worcester Housing Authority.



Calvin Coolidge Schoolhouse | Maynard, MA
2019- present
Project Cost: \$3.8MM

This 12-unit adaptive reuse project of a historic schoolhouse in Maynard, Massachusetts was awarded to Civico via RFP. The Calvin Coolidge School is a local gem adjacent to the Town's revered public sledding hill. Working with neighbors, a volunteer working group, and Town officials, we devised a strategy to improve the neighboring park, feature the local sledding hill, and provide additional parking for park visitors. Taylor is project manager for the Calvin Coolidge School redevelopment, and is additionally responsible for all outreach and community engagement.



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.





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 place 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.



FIRM PROFILE



WAVERLEY WOODS



SIMON-KUCHER & PARTNERS



HISTORIC SOUTH END APARTMENTS



FIRST CHURCH OF ROXBURY
EDUCATION & JUSTICE CENTER



BRIGHT HORIZONS BROOKLINE

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

COMPANY LEGAL NAME:

Davis Square Architects, Inc.

PRINCIPALS/OFFICERS:

- President and Principal: Iric L. Rex, AIA, LEED AP
- Principal and Clerk: Ross A. Speer, AIA
- Principal: Clifford J. Boehmer, AIA

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

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:

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

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.



**DAVIS
SQUARE**
ARCHITECTS

SUSTAINABLE DESIGN
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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 utmost 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
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DAVIS SQUARE ARCHITECTS, INC.

MULTI-FAMILY HOUSING



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



**DAVIS
SQUARE**



Our mission is to produce excellent design, to develop long-term 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

<i>American Institute of Architects</i>	<i>Sierra Club</i>	<i>Office for Commonwealth Development (OCD)</i>
<i>Boston Society of Architects</i>	<i>U.S. Department of Housing & Urban Design (HUD)</i>	

Sustainable design

<i>American Institute of Architects</i>	<i>The Home Depot Foundation</i>	<i>The EnergyStar Foundation</i>
<i>Boston Society of Architects</i>	<i>The Enterprise Foundation</i>	<i>Environmental Design + Construction Magazine</i>
<i>NESEA Green Building</i>		

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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ADAPTIVE REUSE



**A WHOLE NEW LOOK:
BUILDING FROM THE PAST TO
SUPPORT THE FUTURE**



Every building has a history — and the stories they tell is one of the main reasons why adaptive reuse is so critical in preserving history as well as creating opportunities for the present. Throughout the years, many of these buildings' original use becomes obsolete. Reclamation not only is beneficial to honoring these buildings' structural integrity and preservation, but also an excellent resource for giving them a new modern-day purpose.

“ To restore a building is not to repair it, nor to do maintenance or to rebuild, it is to re-establish it in an ultimate state that never existed before.

—Eugène Viollet le Duc

PAST MEETS PRESENT

DAVIS SQUARE ARCHITECTS, INC. has always championed adaptive reuse and preservation throughout our 30-plus years of experience. At a time when real estate is a precious resource and its price at an all-time high, conserving existing property helps to alleviate unnecessary costs and also preserves the fabric of neighborhoods and communities, while helping to bolster their economies.

RENEWED AND RESTORED

When buildings become abandoned or fall into disrepair, repurposing becomes the ideal method of breathing new life into these historic jewels. We strive to maintain historic character as well as ensure the preservation and, where needed, historical accuracy for replication of architectural details. Modernizing these buildings for code requirements such as accessibility, buildings and life safety systems is also a top priority, as well as paying homage to the architectural integrity of the original buildings and its context. Planning for current and future needs is something we establish at the beginning of every project.

We are strong advocates of sustainability, aiming to create environmentally-responsible designs that enhance quality of life for both residents and owners. Building reinvestment and adaptive reuse are closely aligned with our belief of the importance of land conservation, as well as minimizing harmful environmental effects of demolition and new construction.

ENDLESS POSSIBILITIES

Our adaptive reuse projects range from the transformation of a former bank into a trendy neighborhood coffee shop, to the creation of over 40 affordable apartments at a former historic paper mill, to reconfiguring an historic church for multifamily housing. Some of our award-winning projects include:

Towards Independent Living and Learning (TILL): for a human services agency non-profit, we transformed three run-down structures in downtown Chelsea, Massachusetts into 23 affordable units of housing, plus 11,000 sf of ground-level commercial space including a café. The project has won several awards for both its innovative design and preservation.

Bright Horizons Family Solutions Corporate Headquarters: we helped turn a civil war munitions depot into the headquarters of an expanding childcare corporation. Our approach of using a lively and innovative combination of color, form, and unusual materials was recognized for setting new standards of creativity in commercial interior design. ■



ADAPTIVE REUSE OVERVIEW
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WATER MILL APARTMENTS

The adaptive reuse of the Water Mill Apartments is the transformation of a historic paper manufacturing mill building for residential and community use. Creating a welcoming gateway to Leominster's Comb and Carriage district, the 58,000 sf development includes 40 affordable multi-family units on five levels, multi-purpose space for residents, 66 parking spaces, the construction of a small playground, onsite management offices, and demolition of existing adjacent buildings.

Davis Square Architects worked to restore the building to its former glory through a design that combined respect for the architectural integrity of the original building, as well as attention to residents' needs.

Water Mill Apartments also attained LEED certification and is eligible for Historic Tax Credits. ■

LOCATION

Leominster, MA

DEVELOPER

NewVue Communities (formerly Twin Cities Community Development Corporation)

SCOPE

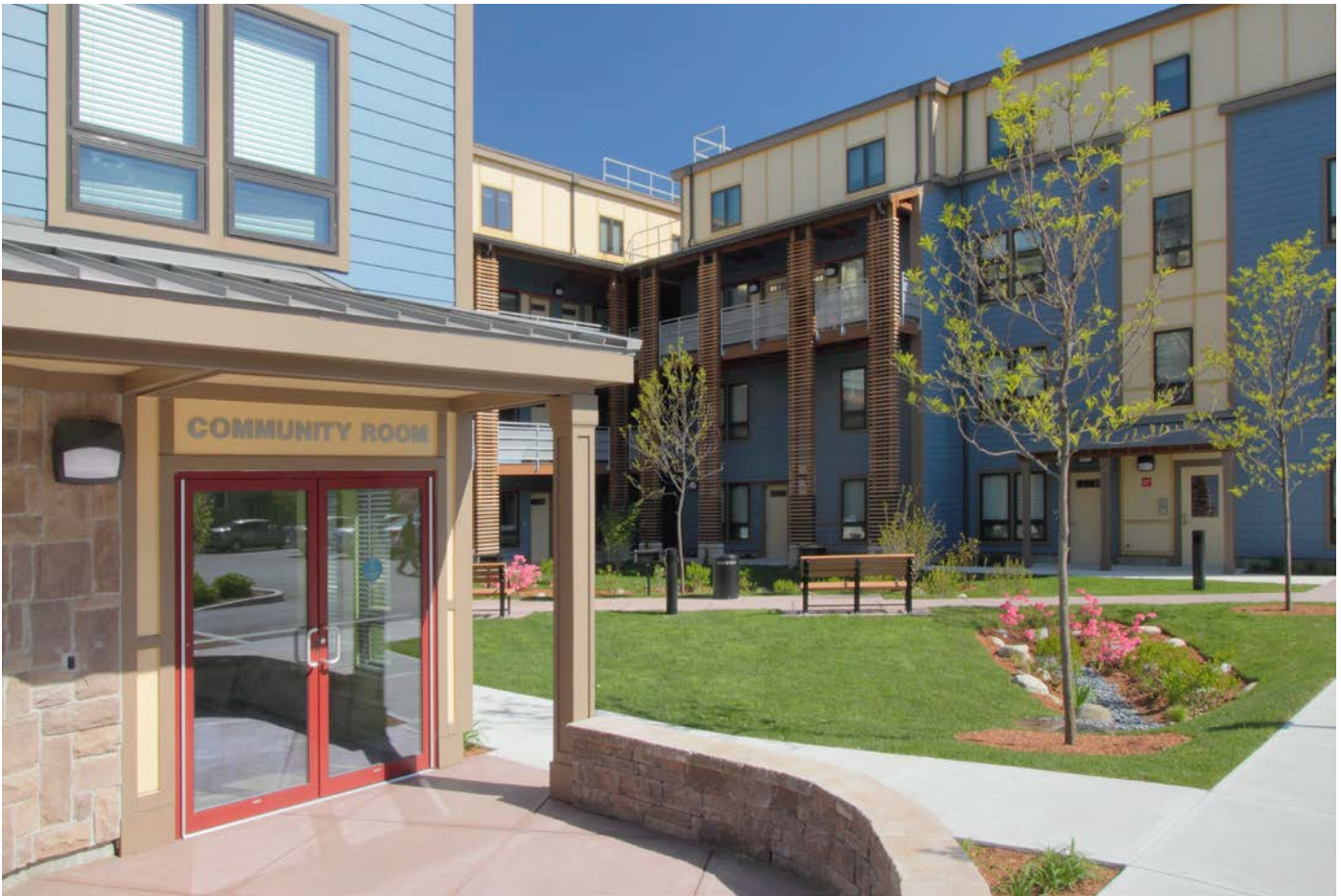
Adaptive reuse
40 units

SUSTAINABLE DESIGN

LEED-Certified



HOUSING & MIXED-USE
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SAINT POLYCARP VILLAGE APARTMENTS | PHASE 2

Phase 2 of the Saint Polycarp Village development features 29 family apartments and a community meeting space. The community room's double doors connect seamlessly to the terrace and natural playground at the heart of the whole Village.

The courtyard at the center of the development is surrounded by stained wood trellises that provides sheltered outdoor balcony space for each apartment, as well as bright open-air stairways and corridors from which to view the landscaped rain garden below. Sustainable development highlights include continuous exterior insulation, solar water heaters, and LED lighting throughout.

Additionally, the apartments all have through-unit natural ventilation. ■

LOCATION

Somerville, MA

DEVELOPER

Somerville Community Corporation

SCOPE

New construction
Transit-oriented design
29 units

SUSTAINABLE DESIGN

Photovoltaic panel array



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HOUSE OF HOPE | BONENFANT PLACE

Davis Square Architects teamed up with House of Hope on Bonenfant Place, the transformation and addition to the former Horn Home in Lowell, MA, a beautiful Italianate building constructed in 1840 that served as a rest home for the aged since 1928. The scope includes renovations to the 1840 home, plus a new addition. The design challenge was to preserve and enhance the historic structure and details, while creating a new building that would be able to blend into the existing context. This exciting project houses 17 formerly-homeless families and a resident manager, and House of Hope now has the capacity to serve 58 families in shelter and 39 families in permanent housing. ■

LOCATION

Lowell, MA

DEVELOPERS

House of Hope

SCOPE

Adaptive reuse
Historic renovation
New construction



HOUSING & MIXED-USE
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ELIAS BROOKINGS APARTMENTS

Davis Square Architects is currently working with Home City Development on the redevelopment of the former Elias Brookings School, an historic school in Springfield that was significantly damaged by the 2011 tornado. Built in 1925, the building will now be restored and transformed into 42 units of mixed-income housing in a combination of one-, two- and three-bedroom apartments. The project plays an important role in the rebuilding and revitalization of the Central Street corridor area after the tornado's devastation, as well as the revitalization of both the Six Corners and Old Hill neighborhoods. ■

LOCATION

Springfield, MA

DEVELOPER

Home City Development

SCOPE

Adaptive reuse
Historic renovation
Transit-oriented design
56,610 sf



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DUDLEY CROSSING

Davis Square Architects is currently working with Nuestra Comunidad Development Corporation on Dudley Crossing, an exciting new mixed-use project that will bring 24 affordable units to Roxbury’s Dudley Square neighborhood. The 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 community will also be Passive House-certified. Its location provides access to the many cultural, commercial, educational, and transportation opportunities Dudley Square has to offer. ■

LOCATION

Roxbury, MA

DEVELOPERS

Nuestra Comunidad Development Corporation

SCOPE

- New construction
- Mixed-use
- Transit-oriented design
- 24 units
- Commercial and retail space

SUSTAINABLE DESIGN

Project will be Passive House-certified



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CROSS TOWN CORNERS

After a devastating tornado, Davis Square Architects helped to rebuild Cross Town Corners, a 47-unit affordable housing community for families and individuals located on four scattered sites in Springfield's historic South End and Six Corners neighborhoods. The rehabilitation included complete roof replacement and restored masonry, new energy-efficient windows, heating, lighting, and appliance upgrades; as well as refurbished common areas with security, improved accessibility and renovated modern kitchen and baths. Additional features include tot lots at two of the buildings and nearby public transportation services. ■

LOCATION

Springfield, MA

DEVELOPER

Home City Development (formerly Home City Housing)

SCOPE

Historic renovation
47 units



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CARTER SCHOOL APARTMENTS

Formerly a bustling middle and high school to Leominster students in its heyday, for the last 20 years the Carter School has sat vacant, and began to collapse in on itself due to neglect and severe water damage.

NewVue Communities teamed up with Davis Square Architects to preserve this beautiful, historic school in order to put it back to productive use with 39 affordable apartments. The building meets Enterprise Communities' GREEN Communities certification and will be placed on the National Register. ■



LOCATION

Leominster, MA

DEVELOPER

NueVue Communities

SCOPE

Adaptive reuse
Historic
62,000 sf

SUSTAINABLE DESIGN

Enterprise Communities' GREEN Communities certification

AWARD-WINNING

Preservation Massachusetts' 2021 Paul & Niki Tsongas Award.



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BARTLETT STATION, BUILDING B

On an 8.6-acre former MBTA trolley yard that was once an urban wasteland, Bartlett Station is a new 10-building, 367-unit mixed-use neighborhood of affordable, moderate, market-rate rental and homeownership housing, senior housing, and commercial/retail space. This transit-oriented development offers public and private greenspaces complete with outdoor seating and dining areas, tot lots, and generous planted walkways. Building B is mixed-use, with nearly 14,000 sf of commercial space, and 60 units of both affordable and market-rate rental housing featuring a variety of sustainable elements and technologies such as high-efficiency insulation and glazing systems, low-flow plumbing fixtures and LED lighting.



Bartlett Station is registered with the LEED-ND pilot program, and Building B will be LEED Gold-certified. ■

LOCATION

Roxbury, MA

DEVELOPERS

Nuestra Comunidad Development Corporation, Windale Developers

SCOPE

New construction
Mixed-use
Transit-oriented design
60 units: 32 affordable, 28 market-rate
13,878 sf commercial space

SUSTAINABLE DESIGN

Project is pursuing LEED-ND certification
Project will be LEED Gold-certified



HOUSING & MIXED-USE
davissquarearchitects.com



126 CHANDLER STREET

Davis Square Architects is currently working with Worcester Common Ground on 126 Chandler Street, the adaptive reuse of the historic former Torrey Razor Co. plus a new five-story addition.

The project will create 31 units of affordable housing for Worcester residents and families as well as 1,700 sf of commercial space along Chandler Street. Working with the City of Worcester and their new Commercial Corridor Overlay District, 126 Chandler Street hopes to be a key contributor to the upward growth and transformation of the neighborhood, and a welcomed benefit to the community. ■

LOCATION

Worcester, MA

DEVELOPER

Worcester Common Ground

SCOPE

Adaptive reuse
Historic
New construction
31 units
1,700 sf commercial space



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37 UNION STREET

Located in Attleboro, MA, 37 Union Street is part of a century-old, multi-building mill complex ideally situated adjacent to an MBTA Commuter Rail station connecting to both Boston and Providence. Davis Square Architects is preparing a master plan and renovation designs for the adaptive reuse of the entire site as a stylish, affordable residential apartment community complete with parking, greenspaces, fitness and community function rooms, and on-site management. 37 Union Street is also known as the Foster Building, once home to a bustling jewelry factory, and lately was part of a high-tech electronics manufacturing company. Parts of the complex are listed on the Register of Historic Places by the National Park Service, so the project is subject to rigorous restoration standards.

The first phase will provide 59 apartments at 37 Union Street, with the total count for the entire complex expected to reach 110 units. Built over time as four contiguous masonry buildings, the structure is being carefully restored with replica windows and modern conveniences, including all-electric systems. The project plays an important role in the revitalization of downtown Attleboro, and will provide high-quality affordable and workforce housing to residents and families. ■

LOCATION

Attleboro, MA

DEVELOPER

E3 Development LLC
Affirmative Investments
The Jerich Group

SCOPE

Adaptive reuse
Historic
Transit-oriented design
Masterplanning
59 units



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LAURA CELLA-MOWATT RA

ASSOCIATE



PROFESSIONAL EXPERIENCE

Laura Cella-Mowatt is an Associate at Davis Square Architects and has been with the firm since 2006. She has over ten years of professional architectural experience working as a designer, clerk-of-the-works, job captain, and project architect. She has worked on many renovation projects, including several historic buildings in and around Boston. Laura excels at problem solving and welcomes the challenges associated with the fast-paced nature of construction administration.

Laura is currently working with Nuestra Comunidad Development Corporation on Dudley Crossing, an exciting new transit-oriented, mixed-use project that will be Passive House-certified, bringing 18 affordable units to Roxbury's Dudley Square neighborhood. 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 Trinity Management on exterior improvements to Mission Park townhouses. She also worked with Thayer & Associates on renovations to a number of their condominium and co-op properties in Boston and Cambridge. Additional projects include the adaptive reuse of an historic mill building in Leominster, MA with NewVue Communities (formerly Twin Cities Community Development Corporation), and with Preservation of Affordable Housing (POAH) on an occupied rehab project in Orleans, MA that included siding replacement, new windows, and unit renovations.

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



ALENA PARUNINA

LEED AP BD+C,
CPHC

DESIGNER



PROFESSIONAL EXPERIENCE

Alena Parunina joined Davis Square Architects in 2016 as a designer. She brings experience collaborating with architects, designers and engineers to produce multidisciplinary drawings for a wide range of projects, as well as performing on-site visits and inspections. She is also skilled at presentation design, and is familiar with product research and material selection.

Alena is currently working on all three of the firm's Passive House projects, including Village Hill at Northampton's North Commons, a project which will house 53 apartments for low- to middle-income households, and continue the redevelopment of the former Northampton State Hospital site. She is also working on Squirrelwood, the refinancing and renovating of Squirrel Brand Apartments, plus the addition of three new infill buildings targeting rigorous Passive House standards, with one expected to achieve Net-Zero Energy status. Dudley Crossing, an exciting new transit-oriented, mixed-use project that includes both new construction and historic renovation, is also among her current projects. The new building will be both Zero-Emissions and Passive House-certified, bringing 24 affordable units and retail to Roxbury's Nubian Square neighborhood.

Alena received both her Master of Architecture and Bachelor of Science in Architecture from Northeastern University. A strong advocate of sustainable design, she is a Certified Passive House Consultant, LEED Accredited and also a certified Construction Document Technologist.

EDUCATION

Northeastern University
Master of Architecture, 2019

Northeastern University
Bachelor of Science in Architecture, 2016

AFFILIATIONS

LEED Accredited – Leadership in Energy
and Environmental Design

Certified Passive House Consultant (CPHC)

Construction Document Technologist (CDT)

Construction Specifications Institute (CSI)





Alena Parumina

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

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.

2859

Professional Number

9/27/2019

Date Issued

1/15/2022

Valid Through



Executive Director

DAVIS SQUARE ARCHITECTS, INC.



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Nitsch Engineering

Building better communities with you



Longfellow Bridge, Boston, MA

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 94% 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.



Peabody Square, Boston's first green street pilot project

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.



MIT North Corridor, Cambridge, MA

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.



Boston Public Library, Johnson Building Boston, MA

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.

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. 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



Years of Experience

- 20 in industry
- 20 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

Professional Affiliations

- Worcester Chamber of Commerce, Women's Information Network, Member
- Professional Women in Construction, Boston Chapter, Board Member and Programs Committee Member
- American Institute of Architecture (AIA) of Central Massachusetts, Committee Member

Chelsea has 20 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

Springfield Technical Community College, Student Learning Commons, Springfield, MA: Project Manager for the Student Learning Commons building project, involving the re-use of a 150-year-old armory storehouse. Responsible for a conceptual design study; preparing schematic design, design development, and construction documents; performing construction phases services; and permitting.

Zervas Elementary, Newton, MA: Project Manager responsible for civil engineering services for construction of the updated 80,000-square-foot Zervas Elementary School. The Project consists of the construction of a new elementary school and various site improvements, including acquisition of three adjacent parcels to create new parking areas. Designed the stormwater management system that included a series of bioretention swales in the main parking area. The emergency access road consists of porous pavement, which is used to supplement the stormwater management system. The site abuts sensitive wetland areas on two sides, and was designed to incorporate access to an existing pedestrian path through the wooded wetlands.

F.A. Day Middle School, Newton, MA: Senior Project Engineer for civil engineering services for the addition to the existing middle school building and associated parking areas. Provided services for the feasibility study, utility design, site layout, site grading, and stormwater management.

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.

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.

Worcester County Jail and House of Correction, Worcester, MA: Project Manager for civil engineering services for the new building serving as the combined intake, medical, and regional lock-up at the Worcester County Jail



Zervas Elementary, Newton, MA



Worcester Trial Court, Worcester, MA

Representative Projects - continued

and House of Correction. Observed existing site surface conditions in order to identify constraints, reviewed local bylaws and attended meetings with the Town to determine permitting requirements; and reviewed state and Federal regulations pertaining to site permitting. Provided a narrative summary of findings.

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 DCAMM'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.

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.

Department of Mental Health, Worcester Recovery Mental Hospital, Worcester, MA: Project Engineer for civil engineering services for a new, 428,000-square-foot hospital that is LEED Gold Certified. The new recovery center and hospital provides a state-of-the-art therapeutic environment that will help patients transition to independent living in the community. Performed utility design, layout, and grading for the building and site; also designed a stormwater management system, including water re-use strategies and a surface drainage feature. Drainage swales were built into meadow slopes to reduce runoff velocity, prevent erosion, and provide water quality treatment. Prepared early site packages for a boiler plant to facilitate the construction demolition schedule, and prepared an earthwork/utilities site package to accommodate the fast-track schedule of the project. Provided construction administration services. The project was built under DCAMM's CM-at-Risk model.





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@architecturalteam.com

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

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

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

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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

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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@pvitedesign.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

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

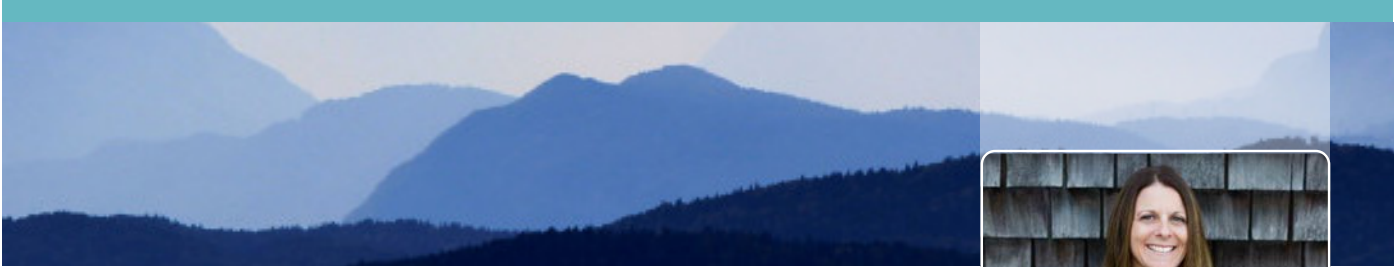
American Society of Landscape Architects, Boston Society of Landscape Architects, Member

Rebecca A. Bachand, RLA, ASLA, LEED AP



Lambert Sustainability

Green Building Consulting & Education



Michelle Lambert
Founding Principal

Lambert Sustainability is a dynamic, engaging sustainable design consulting firm based in the Boston area.

We provide full process facilitation and project management services for projects pursuing a range of sustainability goals and green building rating systems including LEED and Passive House for buildings as well as Envision for infrastructure and planning projects. The firm works in a highly collaborative process with the client, design, and construction teams to meet the project’s vision and goals for sustainability.

Michelle Lambert, the firm’s Founding Principal, is an architect, a green building consultant, and an educator with twenty years of sustainable design experience in both practice and teaching. Having led the sustainability efforts at several of Boston’s largest architecture and design firms prior to starting her own firm, Michelle has worked on over 45 LEED projects varying widely in building type, rating system version and certification level from Certified to Platinum.

In addition, as both a professional and academic educator, a former US Green Building Council Faculty Member, and an Envision trainer, she brings a unique ability to communicate the concepts and strategies contained within LEED and other rating systems in order to provide ongoing education to her project teams, ensuring a more integrated and efficient process.

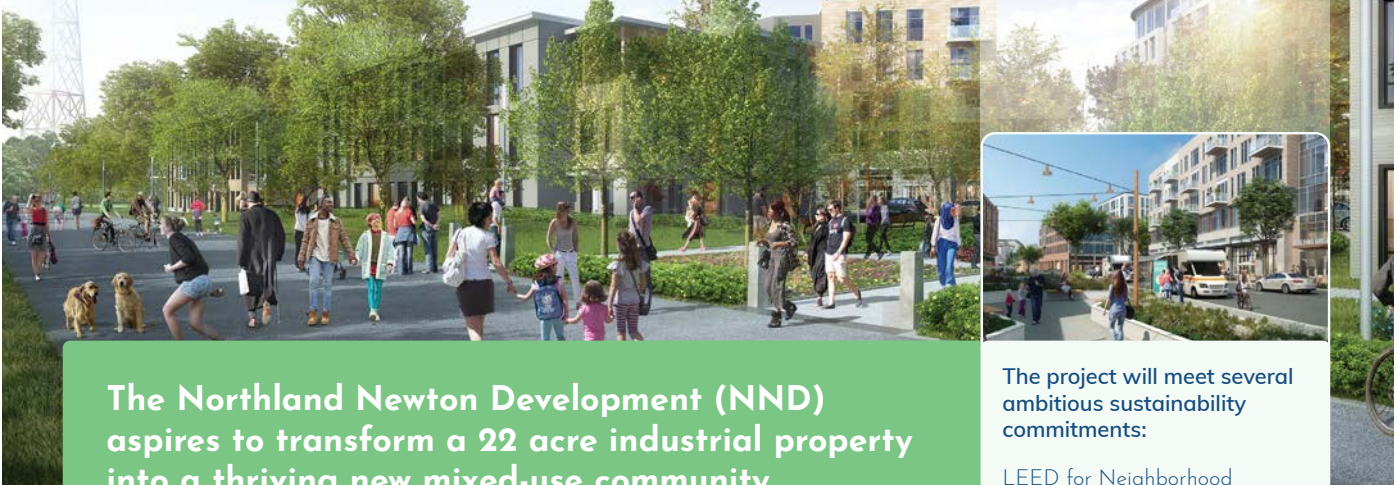
Lambert Sustainability’s mission is to support the design of buildings that are beautiful, functional, support human healthiness and joy, and also leave little to no negative impact on our finite resources, our fragile climate and on our long-term wellness.

www.lambertsustainability.com

Michelle Lambert is an architect, sustainability consultant, educator and collaborator. She specializes in facilitating the development of transformative buildings and communities. As a result, clients identify new opportunities to achieve their sustainability goals

Lambert Sustainability is a Certified Massachusetts Woman Owned Business (WBE)





The Northland Newton Development (NND) aspires to transform a 22 acre industrial property into a thriving new mixed-use community.

Lambert Sustainability is the project-wide sustainability consultant and team coordinator for Northland Investment Corporation’s transformation of 22 acres of underutilized and abandoned industrial property in Newton, MA into a thriving new mixed-use community development that will embrace sustainability and innovation. The project will create a new live-work-play neighborhood which includes diverse housing options, retail and commercial office space as well as new community gathering places, parks and trails. Offices, retail space, and 800 residential units in 14 new buildings and one renovated historic building comprise this exciting new neighborhood.

Lambert Sustainability led the creation of and continuous evolution and implementation of the ambitious sustainability plan through conversations with the community and local stakeholder groups as well as formal presentations to the City Council throughout the 15 month permitting, approvals and conceptual design process. In Design Development, the firm has begun to assess embodied carbon in the buildings as one component of the sustainability commitments.

Timeline: Conceptual Design and Permitting May 2018- August 2020;
Design Development underway

Client: Northland Investment Corporation
www.northlandnewtondevelopment.com



The project will meet several ambitious sustainability commitments:

LEED for Neighborhood Development (ND) Certification for the entire site at the Silver Level.

All 14 new buildings within the site shall be designed to be achieve LEED Gold Certification under LEED v4 Multifamily Residential.

Five of the new buildings will be designed and constructed to achieve Passive House Certification.

Passive House feasibility studies will be completed for five additional buildings.

LEED Core and Shell Silver Certification is being pursued for the existing historic 1893 Saco-Pettee mill building.

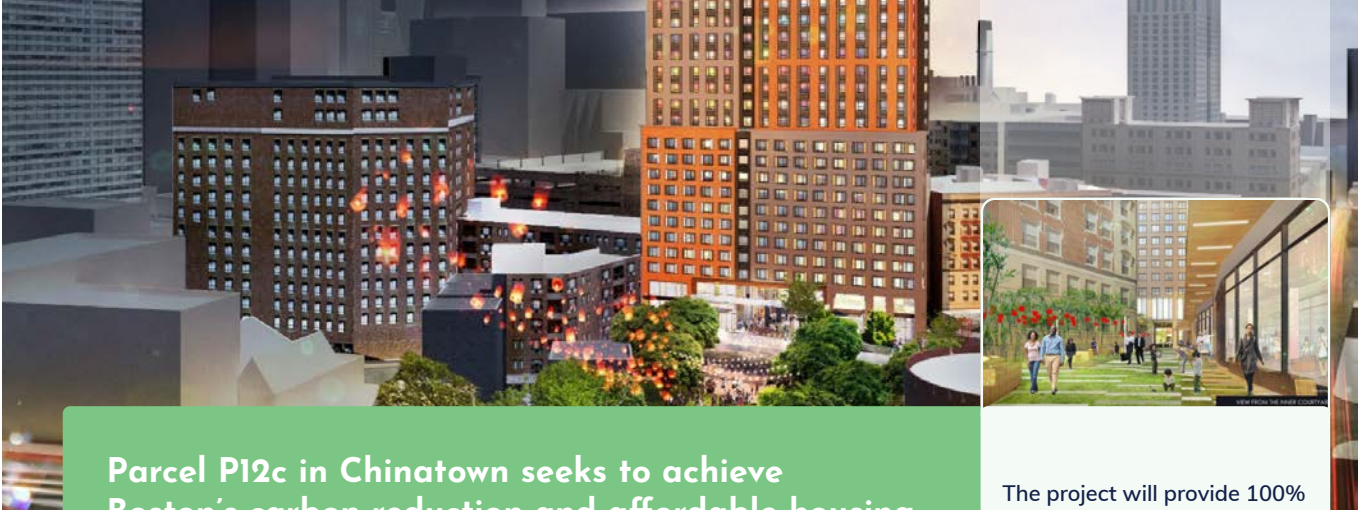
All storm water across the 22 acres will be retained, reused or infiltrated on site.

All buildings will be all-electric for heating, cooling, and hot water. Nearly the entire development will be electric such that in the future when the electric grid is powered 100% with renewable energy, it will be

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Parcel P12c in Chinatown seeks to achieve Boston’s carbon reduction and affordable housing goals.



The project will provide 100% affordable housing units plus achieve the following sustainability commitments:

LEED BD+Cv4 Gold Certifiable

The project is completing a Passive House feasibility study and studying options to achieve net zero energy/net zero carbon.

Located on Tremont Street in downtown Boston, this mixed-use development will provide 171 affordable home ownership and rental housing units in the economically challenged Chinatown neighborhood. In addition to the residential units, the 30-story tower will include a 200-room hotel, ground floor retail space, 8,000 sf of community space for a planned Boston Public Library branch, a large public courtyard and an adjacent parking garage.

Lambert Sustainability is in the role of LEED consultant and is also facilitating compliance with the City of Boston’s Article 37 green building requirements for LEED as well as the new Zero Carbon Building policy. This project is one of the first to be permitted under the Carbon Free Boston Initiative resulting in a highly collaborate process between the team and the City of Boston to brainstorm and study innovative new approaches to achieving carbon reduction goals for the built environment.

Timeline: Design and Permitting Aug 2019- present

Client: Millennium Partners (MP Boston)

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Lambert Sustainability is a Certified Massachusetts Woman Owned Business (WBE)





Michelle Lambert, Founding Principal

LEED AP BD+C / Certified Passive House Consultant (CPHC) / Envision Sustainability Professional (ENV SP)

781-801-0233

michelle@lambertsustainability.com

Professional Practice

- 2017- Present Lambert Sustainability, LLC
Founding Principal
- Lambert Sustainability, a Certified Massachusetts Woman Owned Business (WBE), is a dynamic and innovative sustainable design consulting firm based in the Boston area. The firm provides full process facilitation and project management services for projects pursuing LEED Certification, Envision for Sustainable Infrastructure Certification, and other sustainability rating systems.
 - For a full list of project experience, visit lambertsustainability.com
- 2013- 16 VHB - Watertown, MA
Project Manager - Sustainability Consultant
- Project management of multiple LEED green building projects and Envision sustainable infrastructure projects. Facilitation of the entire Certification process, coordination of the project teams, credit calculations and writing of service and fee proposals.
 - Development and delivery of internal and external educational training sessions on LEED and Envision Sustainability Rating Systems.
- 2011- 13 The Green Roundtable Inc. - Boston, MA - Affiliate of the U.S. Green Building Council
Project Manager - Green Building Consultant
- Provided project management for several LEED green building projects including process facilitation, project planning and fee proposals, materials research, LEED credit calculations and submission reviews.
- 2007- 10 ADD Inc - Boston, MA
Architect and Sustainable Practice Leader
- Junior architecture project manager of a mid-size residential project, and as a team member on several commercial projects.
 - Served as LEED facilitator on multiple core and shell, new construction and interiors projects.
- 2006- 07 Elkus Manfredi Architects - Boston, MA
Architect
- Worked on architectural projects and large scale masterplanning projects.
 - Facilitated LEED documentation process for a large university project.

Professional Credentials

Certified Passive House Consultant (CPHC), PHIUS, Earned August 2019

LEED Accredited Professional, LEED AP BD+C, Earned in 2002 and credential maintained to present.

US Green Building Council Faculty Member, 2010-11

Envision Sustainability Professional (ENV SP), Credential administered by the Institute for Sustainable Infrastructure (ISI) for the Envision Sustainability Rating System; earned February 2015.

Envision Certified Verifier and Trainer,

Credentials administered by ISI to deliver official Envision Credentialing Courses and to perform third-party Verification reviews of projects applying for an Envision Award; Completed training workshops and earned trainer and verifier status Feb/March 2015.

Recent Professional Presentations

- April 2021 **City of Boston/BPDA**, Planning Committee and Facilitator
[*Embodied Carbon Impacts and Opportunities Public Meeting*](#)
- March 2021 **Massachusetts College of Art and Design, Architecture studio**
Guest lecture on Adaptive Reuse and Embodied Carbon
- Dec 2020 **CREW Boston Sustainability Committee**
Co-Presentation with Kristen Fritsch, Elkus Manfredi Architects, December 9, 2020
[*“Reuse, Tear Down or Rebuild?, Understanding the Impact of Embodied Carbon: Comparing Options for an Historic Retrofit in Boston”*](#)
- Oct 2020 **CREW Boston Monthly Luncheon**
Co-Presentation with NND Project Team, October 8, 2020
[*Northland’s Newton Development: Discovering a 21st Century Green Neighborhood in a Newton Gateway*](#)
Presentation on the cutting edge sustainability elements of the project including Passive House, LEED-ND and embodied carbon.
- Sept 2020 **Northeastern University Sustainable Building Organization (NUSBO)**
September 30, 2020
[*“Embodied Carbon in Buildings: Cutting Edge Research, Tools and Policies to Quantify and Reduce Embodied Carbon as a Piece of Solving the Climate Imperative”*](#)
- Oct 2019 **Passive House Massachusetts Symposium 2019**
October 23, 2019
[*Scaling the Passive House Market in Massachusetts*](#)

Education

- 2005 Master of Arts in Urban and Environmental Policy and Planning (UEP)
Tufts University, Medford, Massachusetts
- 1999 Bachelor of Architecture
Carnegie Mellon University, Pittsburgh, Pennsylvania



Michelle Lambert

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

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.

2768

Professional Number

6/26/2019

Date Issued

7/15/2022

Valid Through

Tam S.
Executive Director



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

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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

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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 Health 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.

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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

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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)

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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

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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

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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.

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- 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*

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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 LIP 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

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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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CORPORATE QUALIFICATIONS

The Public Archaeology Laboratory, Inc. (PAL) is a leading authority in cultural resource management and specializes in archaeology, architectural history, research and documentation, and preservation planning throughout New England and the Mid-Atlantic. An independent, non-profit corporation located in Pawtucket, Rhode Island, PAL has successfully completed more than 4,000 projects in the areas of cultural resource management, historic preservation planning, regulatory consultation, compliance with Section 106 of the National Historic Preservation Act, and state and federal historic tax credit projects. Established in 1982, PAL has steadily grown to become the largest private cultural resource management firm in New England with a staff of more than 50 people. The PAL team includes specialists in the disciplines of pre-contact and historic archaeology, industrial history and archaeology, architectural history, and preservation planning. The principal investigators for archaeology are Registered Professional Archaeologists. All staff meet the professional criteria for their respective disciplines established by the National Park Service (36 CFR Part 61).

The firm has a proven record of quality products that withstand rigorous technical reviews. The staff has developed innovative planning and project management strategies tailored to each client's needs. Our reputation is built upon facilitating large, complex projects efficiently and effectively. PAL's approach relies on integration, blending the skills of pre-contact, historic, and industrial archaeologists, architectural and industrial historians, historians, preservation planners, conservators, and technical support staff. PAL serves a broad client base who rely on PAL for our ability to rapidly mobilize staff and resources to conduct cultural resource surveys, preservation planning studies, eligibility determinations, environmental impact assessments, regulatory compliance, and consultation.

Consistency in our professional capabilities and responsive staff generates client confidence and long-term relationships, including numerous on-call services contracts. PAL's clients include federal and state agencies, municipalities, utility companies, engineering firms, private corporations, non-profit organizations, individual property owners, and Native American Tribes.

The PAL team understands that flexibility and responsiveness are key elements in supplying outstanding service to our clients. We have the management skills, staff, and support systems necessary to ensure that all projects, regardless of size, are completed on time and within budget.

26 Main Street Pawtucket, RI 02860 Tel: 401.728.8780 Fax: 401.728.8784 www.palinc.com



MAUREEN A. CAVANAUGH

SENIOR PLANNER

EDUCATION

MA, Urban Affairs – 1987
Boston University
BFA, Art History – 1981
BS, Nursing – 1981
University of Rochester

EXPERIENCE

Years with PAL: 10
Years Experience: 35

AFFILIATIONS/ MEMBERSHIPS

National Park Service Boston
Harbor Islands Advisory Council,
2006 – Present, Chair/Vice Chair
2009–2015

National Park Service Boston
Harbor Islands Partnership 2006
– Present

Preservation Massachusetts
Board of Directors 2017-Present

Women's Transportation
Seminar, Public Art Committee

Wayland Community
Preservation Committee, 2010 -
Present

Ms. Cavanaugh is a leading authority on best practices for successfully navigating the complex historic preservation landscape and well-respected throughout the regulatory and development communities. She has a wealth of professional experience in developing environmental planning documents for an array of public and private real estate projects. She has special expertise in cultural resource management, historic preservation planning, state and federal rehabilitation investment tax credits, and preparation of environmental analysis and regulatory compliance documents for review by the National Park Service, Advisory Council on Historic Preservation, state historical commissions, and local planning boards and historical commissions.

Ms. Cavanaugh has served as Project Manager for numerous multi-disciplinary projects involving environmental review, planning, and cultural resources. She has extensive experience in implementing Section 106 of the National Historic Preservation Act, Chapter 254 of the Massachusetts General Laws, and related state and federal environmental laws, regulations, and guidelines affecting historic resources, including National Environmental Protection Act (NEPA) and the Massachusetts Environmental Policy Act (MEPA). Ms. Cavanaugh assists clients in meeting regulatory requirements through consultation with state and federal agencies and the preparation of environmental impact assessments and documentation, Section 106 and Section 4(f) evaluations, and memoranda of agreement. She has established working relationships with numerous municipal, state, and federal agencies, the development community, architectural and planning firms, and private organizations involved in cultural resource management.

Ms. Cavanaugh has teamed with developers and architects to complete numerous historic rehabilitation projects utilizing federal and state historic tax credits. Her familiarity with interpreting the Secretary of the Interior's Rehabilitation Standards and depth of experience working with State Historic Preservation Offices ensures the successful outcome of these and other types of historic building rehabilitation projects.

Ms. Cavanaugh has worked on projects throughout the Northeast and in New York, Pennsylvania, Kansas, Colorado, and Puerto Rico.

Ms. Cavanaugh is a recipient of the Paul E. Tsongas Award from Preservation Massachusetts for contributions to historic rehabilitation projects (2014) and the Niki & Paul Tsongas Award from Preservation Massachusetts honoring women in historic preservation (2016). She serves on several boards, including the National Park Service Boston Harbor Islands Partnership, appointed by the Secretary of the Interior. Maureen meets the Secretary of the Interior's Qualifications as a Historic Preservation Professional.



Historic Rehabilitation Tax Credits PAL Qualifications

The Public Archaeology Laboratory, Inc. (PAL) is a cultural resources management firm based in Pawtucket, Rhode Island. PAL assists clients in successfully navigating complex historic preservation review and planning processes by providing expert consultation services and historic resources documentation.

PAL's team of architectural historians, industrial historians, preservation planners, and archaeologists provides clients with the insight and guidance needed to secure project approvals and clearances from local, state and federal agencies, State Historic Preservation Offices, the National Park Service, and local historic district commissions. PAL's staff has extensive experience in assisting clients with historic preservation planning and compliance, and architectural design review. We are expert in interpreting Section 106 of the National Historic Preservation Act, Chapter 254 of the Massachusetts General Laws, and related local, state, and federal regulations and guidelines affecting historic resources. PAL has assisted numerous project proponents and their design teams in meeting the Secretary of the Interior's *Standards for Rehabilitation*. We maintain strong professional relationships with the National Park Service and the State Historic Preservation Offices.

PAL's staff advises owners and developers of older and historic buildings through the development process, helping them secure state and federal historic tax credits. Services include preparation of Parts 1, 2 and 3 applications, National Register nominations, and construction oversight. PAL facilitates consultation with the client and review agencies through project planning/design, preliminary approval, and construction to project completion.

Our primary historic tax credit service area extends throughout the Northeast, but we often conduct projects in other regions of the United States, including the Mid-Atlantic. Maureen Cavanaugh, Senior Planner, previously worked at the Massachusetts Historical Commission (MHC), where her responsibilities included reviewing historic tax credit applications. Alisa Augenstein, Senior Architectural Historian and Maureen's collective experience has resulted in the preparation of state and federal historic tax credit applications for over 190 projects representing a total investment of over \$3.2 billion qualifying for over \$750 million in state and federal credits.

Recent and ongoing mill historic tax credit projects in Massachusetts include the Watson, Newell & Company in Attleboro, Clinton Wire Cloth Company in Clinton, Ashworth Brothers Mill in Fall River, Wamsutta Mill in New Bedford, Fitchburg Yarn Works in Fitchburg, Upper Pacific Worsted Mill #10 in Lawrence, Boott Mill in Lowell, as well as Allen Printworks in Providence, RI, Hope Webbing in Pawtucket, RI, and China Mill in Allenstown, NH.

26 Main Street • Pawtucket, Rhode Island 02860 • 401.728.8780 • Fax: 401.728.8784 • www.palinc.com

Terrence P. Morris, Esq.
Attorney-at-Law
57 Elm Road,
Newton MA 02460

EDUCATION College of the Holy Cross, Bachelor of Arts
Suffolk University Law School, Juris Doctor

REGISTRATION Licensed Real Estate Broker, Commonwealth of Massachusetts
Former Licensed Construction Supervisor, Commonwealth of Massachusetts

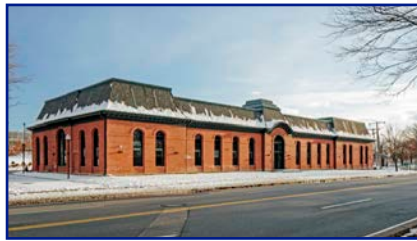
PROFESSIONAL EXPERIENCE Active in zoning and development matters for fifty-one years in both the public and the private sectors. As a private developer, he has coordinated permit approvals for, and overseen the construction of, the adaptive reuse of various commercial and institutional sites for residential development in Newton.

From 1996 to 2007, coordinated the approval and construction of several multi-family developments in Newton and Brookline as Vice President/General Counsel for development firms, where he was responsible for: coordinating the preparation of architectural and engineering documents for each project; overseeing public review and approval process for special permit projects; interactions with corporate counsel and municipal departments, including Inspectional Services, Engineering, Planning and Public Works; and evaluation of the zoning and land use aspects of prospective projects.

From 2007 to date, he has maintained a private law practice with a specialty in land use planning and zoning. Over the course of his career, he has successfully permitted development projects in Cambridge, Somerville, Newton, Brookline, Framingham, Ashland, Watertown and Waltham as well as successfully proposed amendments to the zoning by-law for Town meeting in Needham.

Prior to his private sector work,

- Served on the Newton Board of Alderman as elected Alderman-at-Large from 1973 to 1983. As chairman of its Land Use Committee, he directed the review of all projects that required either zone changes or special permits.
- From 1974 to 1990 served as Deputy Director of Administration for the Massachusetts Commission Against Discrimination.
- As Executive Director of the Cambridge Rent Control Board from 1990-1996, he was responsible for the administration of 12,000 rent-controlled units, including the review of rent increases pertaining to capital improvements on all such properties.



Company Profile

Colantonio is a leader in managing complex construction projects for the housing and historical restoration markets. Established in 1978 by Chairman and CEO Fran Colantonio, our firm offers preconstruction, general contracting, and construction management services and is known for expertise, due diligence, and high level of collaboration.

Specializing in multi-unit housing renovations, Colantonio has the logistics, phasing and coordination experience required for a smooth construction process. Our comprehensive preconstruction services, combined with the ability to self-perform sitework, carpentry and concrete ensure a successful project.

Over the past 12 years, Colantonio has successfully planned and/or built 931 units of affordable or mixed-income housing totaling \$250 million in value, mostly on congested, urban sites. Four of our six projects currently under construction are affordable housing projects in Newton, Cambridge and Brookline. All these projects were financed with a combination of a wide range of private and public sources, including low-income housing tax credits, historic tax credits, federal and state rental assistance funds, and local funds.

Two of our historic housing projects, Fitchburg Yarn Works and Mystic Water Works, received the Thomas M. Menino Legacy Award by Preservation Massachusetts. Fitchburg Yarn Works also received the Massachusetts Historical Commission's Preservation Award for Adaptive Reuse, Rehabilitation and Restoration. Mystic Water Works was also honored with the Somerville Preservation Award.

Other historic award-winning projects include the State House Senate Chamber Renovation, Jamaica Plain Branch Library, Elliot Innovation School, Provincetown Library, and the Heineman Ecumenical and Cultural Center at Framingham State University.

Firm Principals

Chairman and CEO Fran Colantonio grew up in Newton, where he started his carpentry business in 1978 and where his mother lived until the age of 103. His extended family continues to live in Newton, and still enjoys strong ties to the community and to the city's building-related departments. He has been involved in both the planning and construction of multi-family residential construction projects for more than 40 years. Fran has a BS in Business Administration, holds several building, supervisor and operator licenses, and is the Chair of the Board of Directors for the Associated General Contractors of Massachusetts.

President and Project Executive George Willwerth has 33 years of construction experience, 27 years with Colantonio and a BS in Civil Engineering. He joined Colantonio as a high school student in 1988.

George has been overseeing the firm's operations for the past 20 years and has served as project executive on most of our affordable housing projects. His first-hand experience includes surveying, estimating, and project management on projects ranging from the Central Artery Tunnel to affordable housing to historic restorations.

Vice President of Preconstruction Christopher Powers has 17 years of estimating, procurement and project management experience and has a BS in Building Materials and Wood Technology. In his 10 years with Colantonio, he has been instrumental in the success of our affordable housing projects with the accuracy, thoroughness and quality of the preconstruction services he and his team provide.

Relevant Experience



Fitchburg Yarn Works, Fitchburg, MA

Owner: Winn Companies

Architect: The Architectural Team

\$27 million, 182,500 sf gut renovation of an historic yarn mill into 96 units of housing for WinnCompanies. It features more than 280 8' x 10' windows and exposed brick walls and is listed on the National Register of Historic Places.

λ 2018 Mayor Thomas M. Menino Legacy Award, MA Historical Preservation, Preservation Massachusetts Awards

Mystic Water Works, Somerville, MA

Owner: Somerville Housing Authority

Architect: DiMella Shaffer

\$10.1 million, 24,000 sf, historic gut renovation/reuse of the 19th century water works building into 25 units of affordable housing for the Somerville Housing Authority. Removed existing interior structure and replaced it with a 2-story structure.

λ 2020 Mayor Thomas M. Menino Legacy Award, 2018 Somerville Preservation Award



Haywood House, Newton, MA

Under Construction

Owner: Newton Housing Authority

Architect: Baker Wohl

\$21.8 million new construction of 55 units of affordable housing for low and moderate-income seniors and persons with disabilities in an existing Newton Housing Authority development. Scope includes related parking, demolition of existing community center building and landscape improvements.

86 Dummer Street, Brookline, MA

Owner: Brookline Housing Authority

Architect: TISE Design Associates

\$13 million, 38,500 sf new construction of a 32-unit, wood-frame building for the Brookline Housing Authority. Included underground garage, extensive site work. Restricted site next to existing occupied housing development.



Golda Meir Additions, Newton, MA

Under Construction

Owner: 2Life Communities

Architect: PCA

\$31 million occupied expansion involves two additions to a 199-unit senior living facility, for an additional 68 units and 10 renovated units.



Fran started the business in 1978 with a background in carpentry and industrial engineering management. In the early '80s, his small crew became known for its excellent wood frame craftsmanship, building condominium, apartment, and commercial buildings for larger companies.

Over the last four decades, Fran has steadily grown the business into a \$75 million, award-winning general contractor and construction management firm. He attributes his success to ensuring that honesty, trust and integrity are at the heart of every project, and to hiring good people who share his philosophy.

EDUCATION

UMass Dartmouth, BS in
Business Administration

CERTIFICATIONS AND LICENSES

Boston Builder's License

Hydraulic License

MA Construction Supervisor's
License

MA Public Safety Supervisor

MA Welder's License

Merchant Mariner Credential
2014

OSHA 30-Hour Safety
Certification

REFERENCES

Timothy Bonfatti
Compass Project Management
(508) 589-5061
tbonfatti@compasspmnc.com

Amy Schectman
2Life Communities
(617) 912-8400
aschectman@2lifecommunities.
org

Jennifer Pinck
Pinck & Co. / Anser Advisory
(617) 445-3555
jpinck@pinck-co.com

Golda Meir House Renovation, Newton, MA

\$35 million, 178,200 sf, comprehensive phased, occupied renovation of independent living facility with 199 units for 2Life Communities on a constricted site. Reconfigured all common space, made accessibility upgrades. Incorporated entirely new HVAC, water heating and storage systems and new primary/secondary, electrical service and distribution without interruption to existing facility.

Haywood House, Newton, MA

\$23 million new construction of 55 units of affordable housing for low and moderate-income seniors and persons with disabilities in an existing Newton Housing Authority development. Scope includes related parking, demolition of existing community center building and landscape improvements.

Mystic Water Works, Somerville, MA

\$10.1 million, 24,000 sf, historic gut renovation/reuse of a 19th century water works building into 25 units of affordable housing for the Somerville Housing Authority. Removed existing interior structure and replaced it with a 2-story structure. Recipient of 2018 Somerville Preservation Award.

Fitchburg Yarn Works, Fitchburg, MA

\$26 million, 182,500 sf rehab of the historic Nockege Mill into 96 mixed-income housing units for WinnCompanies. Building sits on 7.4 acres on the Nashua River near downtown Fitchburg. Major heavy timber structural renovation, included abatement, demolition and sandblasting of interior.

86 Dummer Street, Brookline Housing Authority, Brookline, MA

\$13 million, 38,500 sf new construction of a 32-unit, wood-frame building for the Brookline Housing Authority. Included underground garage, extensive site work. Restricted site next to existing occupied housing. (Ch. 149A)

Fitchburg Place Apartments, Fitchburg, MA

\$19 million, 42,500 sf, M/E/P, kitchen and bath upgrades for 100 affordable housing units for WinnCompanies. Constricted urban location with limited site access. Recipient of CMAA 2013 Project Achievement Award.

Eliot Upper School, Boston, MA

\$19 million, 36,000 sf, complete gut renovation of an historic masonry and wood-frame building for the City of Boston on restricted North End site. Required interior excavation and the execution of a complex shoring plan to support the exterior walls.

Lincoln Town Offices, Lincoln, MA

\$5.4 million, 16,000 sf, gut renovation of historic three-story town offices building. Shored the building to support the structure while interior demolition and construction was performed. Achieved LEED Silver Certification.

Christopher Powers, CSI CDT

VP of Preconstruction



Chris is deeply experienced in estimating, procurement and project management in the public and private sectors, using both the CM at Risk and hard bid delivery methods. His direct involvement with estimating and procurement streamlines information between project stakeholders accurately and thoroughly.

With his deep knowledge of site work, logistics, and operations, Chris is an excellent leader of the design review, estimating, value engineering and bidding process.

EDUCATION

University of Massachusetts
- Amherst, BS in Building
Materials and Wood
Technology

CERTIFICATIONS AND LICENSES

CSI Certified Construction
Documents Technologist

InSite SiteWork and Utility
Estimating Software

OSHA 10-Hour Safety
Certification

Planswift OnScreen Take-Off
Software

Timberline Estimating
Software

REFERENCES

Zoe Weinrobe
2Life Communities
(617) 912-8406
zweinrobe@2lifecommunities.org

Amy Zarechian
Newton Housing Authority
(617) 552-5501
azarechian@newtonhousing.
org

Maria Maffei
Brookline Housing Authority
(617) 277-2022
mmaffei@brooklinehousing.
org

Golda Meir House Expansion, Newton, MA

\$31 million occupied expansion involves two additions creating 68 new units and renovating 10 units. Construction is a girder slab framing system with stud curtain walls with a combination of brick veneer, metal panel, fiber cement panels and fiber cement clapboard facades.

Golda Meir House Renovation, Newton, MA

\$35 million, 178,200 sf, comprehensive phased, occupied renovation of independent living facility with 199 units for 2Life Communities on a constricted site. Reconfigured all common space, made accessibility upgrades. Incorporated entirely new HVAC, water heating and storage systems and new primary/secondary, electrical service and distribution without interruption to existing facility.

Haywood House, Newton, MA

\$23 million new construction of 55 units of affordable housing for low and moderate-income seniors and persons with disabilities in an existing Newton Housing Authority development. Scope includes related parking, demolition of existing community center building and landscape improvements.

Modernization of Morse Apartments, Brookline, MA

\$18 million occupied renovation of 99 units of affordable housing for the Brookline Housing Authority. Scope involves major interior renovations, including common areas and BHA office space, and minor exterior improvements.

Arthur O'Shea House Renovation, Brookline, MA

\$17.5 million, 67,000 sf occupied renovation of 100 units of affordable housing in a high-rise building for the Brookline Housing Authority. The scope included upgrades to kitchens, baths and plumbing, replacement of the HVAC system, building envelope repairs and site work.

Roosevelt Towers Low-Rise Modernization, Cambridge, MA

\$38 million occupied renovation of four 3-story buildings with 112 units of affordable housing. Scope includes upgrades to the kitchens, bathrooms and MEP systems and new windows and exterior doors and repair of the exterior envelope, landscaping, walkways and parking areas. The project will pursue Enterprise Green Communities Criteria Certification.

Mystic Water Works, Somerville, MA

\$10.1 million, 24,000 sf, historic gut renovation/reuse of the 19th century water works building into 25 units of affordable housing for the Somerville Housing Authority. Removed existing interior structure and replaced it with a 2-story structure. Recipient of 2018 Somerville Preservation Award.

Fitchburg Yarn Works, Fitchburg, MA

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5 YEARS WITH CI
17 YEARS IN
CONSTRUCTION

David Dupuy

Project Executive



David joined Colantonio in May 2016 with 12 years of experience in project management and estimating. His background includes historic restoration, retail and healthcare with former employers Dellbrook Construction, Callahan Construction Managers and McCourt Construction.

David is a dedicated, collaborative professional who works easily with all project team members. He is a talented problem solver and communicates clearly about schedule, finances and construction issues.

EDUCATION

The Ohio State University,
BA in Telecommunications &
Electronic Media

CERTIFICATIONS AND LICENSES

On-Screen Takeoff Software
OSHA 10-Hour Safety
Certification
Procure Construction
Management Software

REFERENCES

Gerard Frank
Bechtel Frank Erickson
(781) 862-3313
gfrank@bfearc.com

Maria Maffei
Brookline Housing Authority
(617) 277-2022
mmaffei@brooklinehousing.
org

Rick Anderson
Hill International
(603) 997-2369
RichardAnderson@hillintl.
com

Golda Meir House Expansion, Newton, MA

\$31 million occupied expansion involves two additions creating 68 new units and renovating 10 units. Construction is a girder slab framing system with stud curtain walls with a combination of brick veneer, metal panel, fiber cement panels and fiber cement clapboard facades.

Golda Meir House Renovation, Newton, MA

\$35 million, 178,200 sf, comprehensive phased, occupied renovation of independent living facility with 199 units for 2Life Communities on a constricted site. Reconfigured all common space, made accessibility upgrades. Incorporated entirely new HVAC, water heating and storage systems and new primary/secondary, electrical service and distribution without interruption to existing facility.

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O'Shea House Renovation, Brookline, MA

\$17.5 million, 67,000 sf occupied renovation of 100 units of affordable housing in a high-rise building for the Brookline Housing Authority. The scope included upgrades to kitchens, baths and plumbing, replacement of the HVAC system, building envelope repairs and site work.

SELECTED PREVIOUS EXPERIENCE:

The Lofts at 30 Pine, Gardner, MA

\$13.8 million renovation of 75,000 sf furniture factory into 55 one, two and three-bedroom apartments. Included new steel-framed single-story parking deck over existing open lot. Received 2016 Thomas M. Menino Legacy Award.

Hamel Mill Lofts, Haverhill, MA

\$55 million renovation of historic 367,000 sf leather factory, consisting of four buildings, into 350 one- and two-bedroom units, 20% deem affordable housing. Complete renovation of the building façade, including masonry repointing and repair and waterproofing of the cast-in-place building face. Included removal of contaminated soils within the building's basement area. Winner of the Massachusetts Historical Commission 2010 Preservation Award (Restoration and Adaptive Reuse category).



2 YEARS WITH CI
10 YEARS IN
CONSTRUCTION

Robert Healy, CPHB

BIM/MEP Manager



Rob joined Colantonio in September 2019 with 8 years of BIM and virtual design and construction experience on commercial, industrial, biotech, pharmaceutical, laboratory system design and pre-fabrication projects. Former employers include Weston & Sampson, AZ Corporation and Hart Design Group.

Rob's background includes the design and coordination of the mechanical systems for many co-gen facilities, lab renovations and university facilities projects.

EDUCATION

Community College of RI,
Coursework

CERTIFICATIONS AND LICENSES

Certified Passive House
Builder

American Society of
Plumbing Engineers

AutoCAD

AutoCAD Fabrication

AutoCAD Plant 3D

Bluebeam Revu

Certified Plumbing Design
Technician, ASPE

Certified Plumbing Designer,
ASPE

Insight Software

Revit, Navisworks, BIM360,
ReCap PRO

REFERENCES

Brian McCusker

Weston & Sampson
(508) 698-3034
mccuskerb@wseinc.com

Kim Hampson

A/Z Corporation
(800) 400-2420
k_hampson@azcorp.com

Kristin Kowalik-Grillo

Weston & Sampson
(508) 698-3034
kowalikgrillok@wseinc.com

Haywood House, Newton, MA

\$23 million new construction of 55 units of affordable housing for low and moderate-income seniors and persons with disabilities in an existing Newton Housing Authority development. Scope includes related parking, demolition of existing community center building and landscape improvements.

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Roosevelt Towers Low-Rise Modernization, Cambridge, MA

\$38 million occupied renovation of four 3-story buildings with 112 units of affordable housing. Scope includes upgrades to the kitchens, bathrooms and MEP systems and new windows and exterior doors and repair of the exterior envelope, landscaping, walkways and parking areas. The project will pursue Enterprise Green Communities Criteria Certification.

Morse Apartments Modernization, Brookline, MA

\$17.8 million, 62,958 sf occupied renovation of 99 units of affordable housing for the Brookline Housing Authority. Scope involves major interior renovations, including common areas and BHA office space, and minor exterior improvements.

O'Shea House Renovation, Brookline, MA

\$16 million, 67,000 sf occupied renovation of 100 units of affordable housing in a high-rise building for the Brookline Housing Authority. The scope includes upgrades to kitchens, baths and plumbing, replacement of the HVAC system, building envelope repairs and site work.

McCormack Building Immediate Needs, Boston, MA

\$19.4 million occupied renovation of the 21-story headquarters for DCAMM, located next to the MA State House. Includes MEP, accessibility, and life safety equipment upgrades; restoration of exterior brick plaza; and structural repairs to four-level garage.

Medway Public Works Facility, Medway, MA

\$13.2 million new construction of a 29,500 sf, net zero energy pre-engineered building with administrative office space, bays for vehicle repair and for storage, a truck wash, and workshop space. Includes a new salt shed, a materials storage building and a vehicle canopy. A photovoltaic system will be installed on the building roof and canopy.

George Willwerth

President



George joined Colantonio as a high school student in 1988 and worked every school and summer vacation throughout high school and college. He left for Kiewit in 1994 after earning a Civil Engineering degree, but returned to Colantonio in 1999 when working for a family-oriented company became a priority.

George has been overseeing the firm's operations for the past 15 years. His first-hand experience includes surveying, estimating, and project management on projects ranging from the Central Artery Tunnel to affordable housing to historic restorations.

EDUCATION

Worcester Polytechnic Institute, BS in Civil Engineering

CERTIFICATIONS AND LICENSES

Class 2A Hoisting License
CPR and First Aid Certification
OSHA 10-Hour Safety Certification

REFERENCES

Lizbeth Heyer
2Life Communities
(617) 912-8475
lheyer@2lifecommunities.org

Tom O'Neil
Anser Advisory
(857) 445-6817
tom.oneil@anseradvisory.com

Gerry Frank
BFE Architects
(781) 862-3313 x27
gfrank@bfearc.com

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86 Dummer Street, Brookline Housing Authority, Brookline, MA

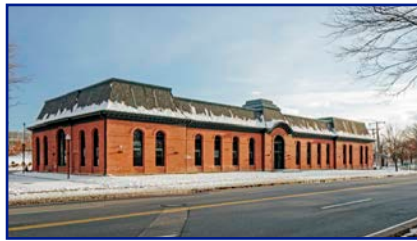
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ZONING ANALYSIS – WEST NEWTON ARMORY

The Applicant will request that the Zoning Board of Appeals grant a comprehensive permit in lieu of the following permits, licenses and approvals, without which the Project could not be constructed as proposed, in the denial of which in many instances would render the Project uneconomic within the meaning of M.G.L. c. 40B, §20 et seq. References herein are to the Revised Ordinances of Newton 2001, as amended, of which Chapter 30 is the Zoning Ordinance.

ZONING ORDINANCE –Newton City Ordinances Volume II, Chapter 30

1. Use

The applicant seeks a comprehensive permit in lieu of variances, special permits, waivers, and/or approval to allow the property to be used for the project including without limitation:

- (a) Special Permit under Section 4.1.2 to permit the Property to be developed with 44 rental units with accessory parking and associated amenities in a Business 2 District. (Development over 20,000 square feet).
- (b) Variance to waive requirements of Section 5.11 to conform. The provisions for affordable housing to the terms of the application, if and to the extent necessary.
- (c) Waiver of the procedure or requirement of a model as provided in Section 7.3.1 and for the obligation to provide plans prepared as provided in Section 7.4.3. In connection with the application for special permit under Section 7.3.1.

2. Affordable Housing

Section 5.11.3 of the Zoning Ordinance provides requirements for participation in affordable housing programs for private developments granted by special permits involving increases in density. The Applicant's program of affordability will provide the 100% of the dwelling units and project will be available for rent to persons or families of low income as defined by the regulations of MassHousing from time to time. Although the applicant believes that the project does not fall within the requirements of Section 5.11.3, nonetheless, to the extent that Section 5.11.3 might be applicable to the project, a comprehensive permit is requested in lieu of a special permit under Section 5.11.3 to conform the affordability elements of the Applicant's program to the requirements of the Zoning Ordinance.

3. Density and Dimensional Controls

The Applicant seeks a comprehensive permit in lieu of such variances, special permit, waivers, and approvals as may be required from or under Section 4.1 for construction of the project in a business 2 District, including, without limitation, the following waivers from the dimensional requirements Of Section 4.1.2 and Section 4.1.3 as follows:

4. Parking Requirements

The Applicant seeks a comprehensive permit in lieu of a special permit pursuant to Section 5.1.13 to permit a parking facility in accordance with the submitted plans and to deviate from, *inter alia*, the following requirements:

- (a) To the extent Section 5.1.3.E prevents assignment of parking spaces to specific persons nor tenants a waiver is sought from that provision.
- (b) Requirement that two parking stalls be provided for each dwelling unit in an apartment house, garden apartment or attached dwellings under section 5.1.4.A.
- (c) Application for parking and loading facility permit under Section 5.1.5.
- (d) Requirement that parking stalls may not be located within the rear setback from any building containing dwelling units under Section 5.1.8.A.1.
- (e) Requirement that parking stall width shall be at least 19 feet under section 5.1.8.B.2.
- (f) Requirement that end stalls restricted on one side by curbs, walls, fences, or other obstructions shall have the maneuvering space at the aisle and of at least five (5) feet in depth and nine (9) feet in width under Section 5.1.8.B.6.
- (g) Requirement under Section 5.1.8.C.1, that 90-degree parking stalls in a two-way traffic aisle shall have minimum maneuvering width of 24 feet.
- (h) Requirement under Section 5.1.9 as to parking lot screening and interior landscaping requirements for outdoor parking facilities of 20 or more stalls if necessary.
- (i) Lighting requirements under Section 5.1.10 , as appropriate.
- (j) To the extent necessary, a waiver from the off-street loading requirements Contained in Section 5.1.12.C.
- (k) Under Section 5.1.12.D.3 . A waiver is sought in lieu of any consent of the city engineer as to drainage of the parking facility.
- (l) Any other relief which may be necessary or appropriate and may be granted by the city Council Under Section 5.1.13 to conform the waiver sought to the plan submitted.

5. Site Plan Approval

The Applicant requests a comprehensive permit in lieu of site plan approval required under Section 7.4 . In connection with special permit granted under Section 7.3.

6. Signage
The Applicant seeks a waiver of the requirements for the number, size and types of signs allowed pursuant to Section 5.2, the sign permit procedures under Section 5.2.4, and, insofar as applicable, any hearing or procedure before the Urban Design Commission.

NON-ZONING ORDINANCES

1. Tree Ordinance – Revised Ordinances §21-80 et seq.

§21-72, §§21-80 through 21-90 and G.L. c. 87 require a permit payment of fees for the removal of certain trees, and in some instances, a contribution to the tree replacement fund. To the extent that any permit, any payment or contribution would otherwise be required under §21-72, §§21-80 through 21-90 or G.L. c. 87, the Applicant request a comprehensive permit in lieu of such permit, fee payment or contribution.

2. Demolition Delay – Revised Ordinances §22-50

Revised Ordinances §22-50 provide for a review by the Newton Historical Commission and the possible imposition of a demolition delay of historically significant buildings. To the extent the existing building may be deemed to fall within the jurisdiction of the Newton Historical Commission under Revised Ordinance §22-50, a comprehensive permit is sought in lieu of a determination by said commission that such structures or features are not preferably preserved.

3. Light Ordinance

Revised Ordinances §20-23 through 20-28 provide limitations on installation of light sources, which do not conform to the criteria stated. Revised Ordinances §22-26 provides for waivers to be granted by the Planning and Development Board. To the extent that any light source may not conform to the requirements of Revised Ordinances §22-24 or that the requirements of that section may be inconsistent with §30-19, the Applicant seeks a comprehensive permit in lieu of any waiver requested under §20-26.

4. Consent of the Planning Board

To the extent any consent or review of the Planning Board is required under Planning Board rules, a comprehensive permit in lieu of such approval is sought.

5. Curb Cut Permit

The Applicant requests a comprehensive permit in lieu of any sidewalk crossing permits or consent of the Commissioner of Public Works to the extent necessary to comply with the requirements of Revised Ordinances §26-65.

6. Utility Connection Permits

The Applicant requests a comprehensive permit in lieu of such local approvals as are required under Revised Ordinances §§23,26 and 29 or otherwise to (i) open streets, (ii) make utility connections for water, sewer, storm water, gas, electric, cable or other utilities or (iii) cross sidewalk from time to time.

7. Amended Relief

The Applicant seeks a comprehensive permit for such amendments to the relief sought herein as may be required to conform the relief sought to the plans as filed, or to any amendments thereof filed in connection with the actions of the Zoning Board of appeals, or the Housing Appeals Committee.

8. Additional Relief

The Applicant requests a comprehensive permit in lieu of all other permits, licenses and approvals as may be issued by the City of Newton . As necessary to conform the relief sought to the plans filed with this Application, as the same may be amended from time to time. Included within the relief sought are all ancillary, subsidiary, usual, customary, or necessary local permits, approvals or licenses in lieu of which the Board may grant a comprehensive permit to the extent necessary to conform the relief granted to the plans submitted herewith as amended from time to time.

REFERENCES

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