
Proposal of
Commonwealth Community Developers, LLC
To the Town of Westminster
for the Development of
Westminster Senior Residences



Submitted August 17, 2018



Senior Housing Proposal
To the Town of Westminster
for the Development of Senior Housing

Development Entity: Commonwealth Community Developers, LLC

Contact Person: James J. Perrine, President

tel.: 617-894-2512; email: jperrine@ccdhousing.com

Submitted August 17, 2018



Westminster Senior Residences

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August 13, 2018

Karen Murphy, Town Administrator and Chief Procurement Officer
Town of Westminster
11 South Street
Westminster, MA 01473

RE: Senior Housing Proposal

Dear Ms. Murphy:

On behalf of Commonwealth Community Developers, LLC ("CCD"), I am delighted to submit this proposal for the acquisition of a leasehold interest in and development of the Westminster Senior Housing site, 69 West Main Street, Westminster, MA. We are submitting this in response to the Town of Westminster's Request for Proposals issued in June 2018.

The Westminster Senior Residences will offer 50 units of affordable rental housing — including 2 studios, 40 one-bedroom units and 8 two-bedroom units. Five units will be income restricted at 30% of the Area Median Income ("AMI"), supported by five Section 8 Project Based Vouchers; three units will be income restricted at 50% of AMI, supported by three Section 811 Project Based Vouchers; the remaining 42 units will be restricted at 60% of AMI. We are seeking the maximum preference for Westminster residents that will be permitted under the various funding programs. It appears that 70% of the units may be able to be included in this preference.

The new building will be constructed with an L-shaped footprint. One side of the L will have two stories of apartments; the other will consist of three stories, two floors of apartments above a level of covered parking. The building will be highly energy-efficient, with geothermal heating and cooling, solar panels and a green roof to reduce utility costs. Each unit will have a balcony or patio and an ample storage closet within the unit. There will be 60 parking spaces, including the covered parking, an open lot and a visitor parking area. A network of accessible walking and exercise trails will be created in the natural space around the property. These will be open to Town residents using the Senior Center as well

project where before there were only deficits and obstacles. The Project will benefit from his extensive experience in the field, broad network of relationships, full commitment to creating strong communities, and successful track record in developing and managing properties similar to the Westminster Senior Residences.

We involve all members of the team from the beginning of the Project. The design professionals, engineers and contractor then work together with the developer and property manager to come up with solutions that improve the design, save money and avoid having to do a redesign to fix something that would have been foreseen if only the relevant professional had been in the room.

The other members of the team have been working in their respective fields for many years -- in most cases, over 25 years. They are well respected and have worked together before.

Architect: Winslow Architects, Inc., Arlington, MA

Mechanical/Electrical/Plumbing/Fire Protection Engineer: Norian Siani Engineering, West Concord, MA

Structural Engineer: D.M. Berg Consultants, Needham, MA

Energy/Sustainability Consultant: New Ecology, Inc., Boston, MA

Accessibility/Code Consultants: AKF Group, Boston, MA

Landscape Architect: Hammer+Walsh Design, Inc., Boston, MA

Civil Engineer: Hancock Associates, Marlborough, MA

General Contractor: Delphi Construction, Inc., Waltham, MA

Attorney: Klein Hornig, Boston, MA

Affordable Housing Monitoring Agent: A.J. Johnson Consulting Services, Inc., Williamsburg, VA

Please see the Development Team Profile (Section 1) for more information about the team.

Third, we are **committed to a participatory community planning process** that responds to input from our local partners, community stakeholders and the neighborhood context. Although we are strong advocates for our vision, we know that community involvement almost always improves the Project. We believe that the concerns of community stakeholders are legitimate, and we listen carefully to fashion solutions that take those concerns into account, while respecting the very real financial, regulatory and other limits on the developer. Above all, we communicate openly, make sure to do what we said we were going to do and explain clearly when we cannot accommodate a stakeholder's request.

- Developer availability to start and sufficient staff resources and availability to perform required services: **Satisfied**. The development team is assembled and involved with the Project. We are ready, willing and able to proceed with the Project the day after the award. Completion of the design, permitting and financing will be done as quickly as possible thereafter. Please see the Project's Implementation Plan and Timetable (section 5).
- Completed required forms at Attachments H, I and J: **Satisfied** (please see executed forms in section 6).

Comparative Evaluation Criteria:

The comments below reflect our excitement about the project.

DEVELOPER EXPERIENCE & CAPACITY (TEAM): Highly Advantageous

- Demonstrated experience in and capability for designing, permitting, developing and managing similar residential projects.
 - James J. Perrine, President of CCD, has over 30 years of broad experience in development, management, construction oversight, finance and property management, including over 10 years specializing in affordable and mixed-income housing development, consisting of both senior and family developments.
 - Winslow Architects has been designing multifamily buildings of this scale for over 30 years.
 - Delphi Construction has been doing construction for 25 years, including many developments of this scale.
 - All other members of the development team have well over 10 years' experience in their professions.
 - Please see Section 1: Development Team, for more information.
- Outcome of comparable projects
 - Included with the development team profile are lists of some of the numerous successful projects completed by James J. Perrine, President of CCD; Winslow Architects, Inc., Delphi Construction and other members of the Development Team.
- Demonstrated experience securing financing for similar projects
 - Mr. Perrine has structured and obtained complex financing for numerous affordable, mixed-income and market-rate developments. A list of some of the funding sources from which he has successfully obtained financing is in Section 1.b.

SITE DESIGN: Highly Advantageous.

- Thoughtful and efficient site design, minimizing impervious surfaces
 - Having some of the parking within the building footprint minimizes parking surface area. Set parking at 1.2 per unit to avoid unnecessarily large paved area.
- Uses standards of low impact development
 - Yes.
- Exterior lighting – minimal impact to neighbors
 - Yes. Jim Perrine is an amateur astronomer and is particularly sensitive to stray light.
- Enhanced buffer to neighboring properties
 - See Landscape Plan, section 3.
- Stormwater management
 - The green roof reduces runoff from the buildings. Although not designed yet, bio-swales, retaining tanks if needed and other provisions will be made for retaining stormwater on site.
- Landscape plan including parking area
 - Yes, please see Landscape Plan, section 3.
- Area designated for snow removal/storage
 - Yes, there will be.
- Adequate visitor parking
 - Yes, in circle near main entrance. Please see Site Plan, section 3.

BUILDING DESIGN: Highly Advantageous

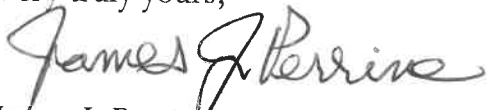
- Exterior is of high quality, while remaining compatible with local historical design
 - Yes, please see Renderings in section 3 and discussion of the design concept in section 2.
- Creative design that is cost effective and high quality
 - Yes, please see Renderings in section 3 and discussion of the design concept in section 2.
- Interior lay-outs meet a variety of needs including universal design
 - We are designing to meet universal design guidelines – particularly important in a building for seniors. Jim Perrine and John Winslow have incorporated universal design in all their developments for at least the past five years.
- Finishes support durability and low-maintenance for tenant
 - Yes – but not designed yet. We are particularly alert to the need for all

- Site visits: the evaluation committee may choose to visit proposers' completed projects
 - We anticipate positive responses.

In summary, with its highly experienced development team, CCD is well positioned to construct and maintain the property according to high standards while meeting the various affordability restrictions over the life of the building.

We hope we have clearly expressed our interest and qualifications in acquiring this property. We are available to respond to any questions you may have or clarify any point in this proposal. Thank you for your consideration.

Very truly yours,

A handwritten signature in dark ink, appearing to read "James J. Perrine". The signature is fluid and cursive, with the first name "James" and last name "Perrine" clearly legible.

James J. Perrine
President

Enclosures

1. Development Team

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www.commonwealthcommunitydevelopers.com

1.a - Developer Contact Information

Developer: Commonwealth Community Developers, LLC (CCD)

Address: 1588 Cambridge Street, Cambridge, MA 02138

Website: www.CommonwealthCommunityDevelopers.com

Contact person: James J. Perrine, President

Telephone: 617-894-2512

Email: jperrine@ccdhousing.com

1.b – Development Team Members

Please note: detailed profiles of the team members are in sections 1.c, 1.f and 1.g.

Developer: Commonwealth Community Developers, LLC, Cambridge, MA

- James J. Perrine, President: Manage the development from start to finish

Property Manager: Commonwealth Community Developers, LLC, Cambridge, MA

- James J. Perrine, President: Oversee all property management activities

Compliance Consultant: A.J. Johnson Consulting Services, Inc., Williamsburg, Virginia

- A. J. Johnson, President: Oversee all tenant income compliance services

Architect: Winslow Architects, Inc., Arlington, MA

Civil Engineer: Hancock Associates, Marlborough, MA

Energy Consultant: New Ecology, Inc., Boston, MA

Landscape Architect: Hammer + Walsh Design, Boston, MA

Mechanical/Electrical/Plumbing/ Fire protection Engineer: Norian Siani Engineering, West Concord, MA

Structural Engineer: D.M. Berg Consultants

Code Consultant: AKF Group, Boston, MA

Cost Estimator: A.M. Fogerty, Hingham, MA

Please see section 1.g for an organization chart of the design team under the leadership of Winslow Architects, including the names of the responsible individuals for each team member

Contractor: Delphi Construction, Inc., Waltham, MA

- Jake Simmons, C.E.O.
- Joseph F. Mastromatteo, Vice President: Manage construction team
- Chris Thompson, Director of Project Development: Manage pre-construction activities

Attorney: Klein Hornig¹, Boston, MA

- Wataru Matsuyasu

¹ This is our regular firm, but we have not yet engaged them for this development.

Highlights of Relevant Experience

As you will see upon reviewing the material in this section, the development team has the experience to design, build and operate a successful development such as the Westminster Senior Housing project. The developer, architect, contractor and several other members of the development team submitted a successful proposal to the Town of Yarmouth to construct a 40-unit affordable development. The project has been fully designed and has received all required municipal approvals -- with considerable community support. The developer's financial pro forma has been vetted with lenders and equity providers; the developer is now in the process of obtaining low income housing tax credits and other state funding for the project. The scale, design and financing of the Yarmouth project is comparable to the Westminster Senior Housing project.

Developer. Jim Perrine, President of CCD, has managed numerous development projects, from concept and feasibility; through design, permitting, financing and construction; to lease-up and stabilized operation. Projects have been large and small, rehab and new, affordable and market-rate, and specifically including the tenant-in-place rehab of several affordable senior communities. These are of particular interest because they both correct problems of the original construction and require the utmost in planning and execution to keep the residents safe and comfortable while construction is going on around them. For example, Central Grammar Apartments, Gloucester, MA, was an 80-unit substantial rehab of a historic school building that had been converted to senior apartments in 1975. The work included masonry restoration, new historically accurate windows, new mechanical systems, installation of fire protection (sprinklers) throughout the building, new kitchens and baths and creation of storage for all the residents. The work in each unit took about a week, during which time residents had to vacate during the day (Jim's team set up a comfortable lounge with large-screen television and provided lunch and snacks) but were able to return to a clean and habitable unit each evening.

The financing for this project included tax exempt bonds, new issue bond program, federal low income housing tax credits, federal and state historic tax credits, state capital improvement preservation funding and local contributions. Jim has structured and closed financing for dozens of complex transactions (and all affordable transactions are complex). In addition to these sources of funds, he has obtained financing from the Federal Home Loan Bank (grants and interest-rate subsidies), HUD Green Retrofit Program (grant), the first multifamily Weatherization (WAP) funding in Massachusetts, MA Community-Based Housing Fund, federal Neighborhood Stabilization Program II, MA Affordable Housing Trust, MassHousing Priority Development Fund, MassHousing 13A Capital Payment Fund, MA Facilities Consolidation Fund, MA Housing Stabilization Fund and many others -- plus conventional bank construction and permanent financing. Each of these sources of funds has its own eligibility requirements and restrictions. Jim is adept at navigating these requirements to structure and obtain financing that have enabled many developments to proceed.

Jim also has extensive property management experience. He founded and ran a management company, Waverly Management, that managed over 1,000 units. He is trained in the most complicated part of managing affordable housing: tenant income documentation and

compliance – in fact, he designed and taught a compliance program for affordable homeownership. The Management Agent Profile included with section 1.f will describe CCD's management approach and the Management Plan in section 4 will outline how that approach applies to the Westminster Senior Residences. But one point should be highlighted: although the company's offices are in Cambridge, management of a property an hour away is something we've done before. Waverly Management, which was also based in Cambridge, managed properties in Belmont, NH (near Laconia), West Springfield, MA and Providence, RI. The key is hiring a strong site manager and maintenance technician, frequent site visits and open communication. CCD will be a long-term owner, and we believe we can provide the best property management.

Finally, Jim has extensive experience in getting apartments rented and complying with all Fair Housing laws. This includes producing the Affirmative Fair Housing Marketing Plan and the Tenant Selection Plan; designing marketing materials and signs; advertising and promoting the property through print, online sites and community organizations; training staff in how to show apartments and process and screen rental applications (while complying with Fair Housing and income restrictions); and welcoming new residents. He has overseen a lottery. It should be noted that the proposed operating budget includes \$500 annually for training staff – this is for Fair Housing and Compliance training.

Design Team. Winslow Architects, Inc. (WAI) has been designing and overseeing the construction of affordable housing for 35 years. They have put together and will lead the Design Team for this project. As you will see from the material in section 1.g, WAI has produced appealing (and award-winning), cost-sensitive designs for many developments of a scale comparable to the Westminster Senior Residences. They have also recently been designing senior and community centers in Framingham and Halifax.

Hancock Associates, civil and geotechnical engineers, surveyors and wetlands scientists, have worked on a broad range of site conditions throughout Massachusetts, southern New Hampshire, Connecticut and Rhode Island for 40 years. They have worked on many sites comparable to the project site. They, along with WAI, will be very involved in the permitting process.

As you will see from the materials in this section, the other Design Team members have extensive experience on developments similar to the Westminster Senior Residences.

Contractor. Delphi Construction has constructed many multifamily buildings, including affordable, market-rate and assisted and independent living. One of their buildings achieved the Certified LEED Platinum from the US Green Building Council. In addition to completing a substantial rehab, the firm constructed a wastewater treatment plant and laid complete sewage piping for the Mashpee Village, a 145-unit development on Cape Cod -- a project managed by Jim and designed by WAI. For further information, please see section 1.g.

Organizational Structure of Development Team

Please see the organization chart included at the introduction of the Design Team's profile,

p.5 of section 1.g.

Effective Communication between the Town and the Development Team

During the permitting phase, Jim will be the primary contact with the Town. WAI and Hancock Associates will be in touch with the appropriate Town staff directly relating to design considerations. Each firm will designate a single individual to be the contact for their firm.

During the construction phase, CCD will hire a Construction Manager (CM) to be the owner's full-time on-site representative. The General Contractor will have a project manager. The Building Commissioner and other Town officials will likely be in communication with both of these individuals.

During the lease-up phase, CCD will hire a site manager. He or she will be the Town's main contact for the lottery and initial lease-up of the property, as well as the on-going future operation of the property.

Jim will continue to be heavily involved, attending weekly on-site construction meetings and overseeing the marketing, leasing and management of the property. In the event of a particularly sensitive issue or a problem that has not been resolved by the CM or site manager, Jim will always be available by cell phone and email, and in person as often as warranted.

1.c – Developer Profile – Commonwealth Community Developers, LLC

- CCD Information
- Resume of James J. Perrine, President
- Development Experience – James J. Perrine, President

COMMONWEALTH COMMUNITY DEVELOPERS

Commonwealth Community Developers is a Cambridge, Massachusetts-based real estate developer of affordable, mixed-income, and market-rate housing. We offer real estate development, finance, investment and property management services.

We believe that affordable housing is a basic right. Our mission is to build high-quality housing for residents of all income levels, to manage every project with the highest integrity, and to help create and sustain strong communities.

*Strategic leader
with extensive
experience in
affordable and
market housing*

INNOVATION

Commonwealth Community Developers is a mission-driven organization with the expertise to bring complex housing projects to completion. Our focus on affordable housing allows us to offer innovative solutions to the financing and development challenges that face these projects. Our in-depth analysis of multiple potential funding sources allows us to uncover and tap additional sources to ensure each development's success.

INTEGRITY

With thirty years of experience in real estate, our founder and president James J. Perrine has an extensive network of professional contacts, successful business and strategic partnerships, and a decades-long reputation for integrity.

COLLABORATION

Our collaborative approach emphasizes trust and communication between partners. We work with neighborhood groups and public officials to meet the needs of all stakeholders in the community.

EXPERIENCE

We are highly experienced in all aspects of affordable housing development, finance, and management, including creative and effective use of federal, state, and local government assistance programs. We provide both strategic vision and hands-on implementation to ensure every development is successful, down to the smallest detail. Our project-specific team of experienced professionals meets the unique needs of each development.

INNOVATION | INTEGRITY | COLLABORATION | EXPERIENCE

Commonwealth Community Developers, LLC

1588 Cambridge Street | Cambridge, MA 02138 | 617-894-2512 | jimperrine@comcast.net

The staff of Commonwealth Community Developers has a proven track record of successful real estate development.

Analyze and reposition properties to create value

- Sponsored four limited partnerships and five joint ventures to purchase and reposition properties
- Conducted analyses on over 100 properties
- Selected, acquired and subsequently upgraded and sold nine apartment buildings, a medical office building, a historic commercial building for rehab, a mixed residential/retail building, and two parcels of developable land

Manage and prepare distressed properties for sale

- Managed OREO properties for BayBanks in early 1990s recession

Invest in market rate apartments and condominiums

- Renovated 735 units in 14 properties
- Completed initial analysis and business plan, renovation, legal document review, interim and end user financing, pricing, marketing, websites and property management

Manage residential and commercial property

- Managed over 1,000 residential units plus retail and office space

Complete financing and restructuring

- Prepared financing packages and obtained financing in excess of \$20 million for real estate acquisitions
- Completed exchange of limited partner interests for ownership of condominium units in slow market

Renovate buildings and complete construction

- Corrected serious structural defects in mid-rise building
- Completed construction, prepared for occupancy and performed property management in three new projects (112 units) with significant development issues
- Converted 70 studios to one-bedrooms in occupied building

Obtain permits and approvals

- Applied for and was granted zoning variances and special permits, subdivision approvals, conservation commission and historic board approvals and neighborhood district approvals

LEADERSHIP

James J. Perrine
Founder and President
Commonwealth Community Developers



James Perrine is an experienced developer with a life-long dedication to high-quality affordable housing.

For over thirty years, Jim has developed hundreds of market rate, mixed income, and affordable housing properties with combined total development costs exceeding \$300 million. He uses a collaborative and innovative approach to make every project meet the needs and requirements of community groups, residents, and local governments.

Many of these developments would not have been possible without Jim's unique understanding of complex affordable housing transactions that involve multiple government subsidies. He brings an in-depth analysis of potential funding sources and the ability to creatively use the restrictions and requirements of each to meet funding needs.

Prior to founding Commonwealth Community Developers, Jim was Senior Consultant of the Roche O'Donnell Group, a consulting firm that specializes in the development of multifamily and mixed-use properties using low-income housing tax credits and federal/state historic tax credits.

Before joining Roche, Jim was Senior Project Manager at The Community Builders where he led multi-disciplinary teams in complex housing development and preservation projects. As Director of Investment Marketing at Chestnut Hill Realty, Jim was responsible for overseeing the firm's brokerage activities and condominium marketing.

In 1983, Jim founded The Waverly Corporation, a real estate development, marketing and management company. Under his leadership, the company sponsored and operated nine limited partnerships and joint ventures. He established and directed a property management affiliate (Waverly Management) and an investment and residential brokerage affiliate (Century 21 Waverly Properties).

Jim earned his M.S. in Real Estate Development from the Massachusetts Institute of Technology and a B.A. cum laude from Harvard University in Government.

Planning

- Site Selection
- Feasibility Analysis
- Due Diligence
- Purchase Negotiation
- Entitlements
- Permits and Approvals

Financing

- Deal Structuring
- Public and Private Financing
- Debt and Equity Financing
- Legal Document Review

Design and Construction

- Plan and Specification Review
- Project Budgets
- Schedule
- Bidding
- Contract Negotiation
- Construction Management
- Final Close-out

Management

- Property Management
- Closing
- Marketing Property for Sale or Lease
- Lease-up and Occupancy
- Compliance

Commonwealth Community Developers, LLC

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JAMES J. PERRINE

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617-876-2610 (h)

Summary

Strategic, versatile leader with extensive experience in affordable and market housing, real estate development, finance, investment, property management, and commercial and residential brokerage.

Professional Experience

COMMONWEALTH COMMUNITY DEVELOPERS, Cambridge, MA, 2017-Present

President

- ◆ Founded the Company to acquire, develop, finance, syndicate, construct, renovate, own and manage affordable, mixed-income and market-rate housing.
- ◆ Sets corporate goals and strategy.
- ◆ Initiates and leads the Company's real estate development activities, including: site selection, feasibility analysis, due diligence, purchase negotiation, entitlements, deal structuring, contracts, design, debt and equity financing, closing, construction, marketing, lease-up and occupancy.
- ◆ Authored successful proposal to build 40 affordable units in Yarmouth, MA; completed entitlements; managed design process; structured financing.
- ◆ Leads the Company's property management activities.
- ◆ Oversees the administrative affairs of the Company.

ALODGIO CONSULTING (f/k/a The Roche-O'Donnell Group), New Haven, CT, 2015-present

Senior Consultant

- ◆ Advise private, nonprofit and housing authority clients on best strategies for development, finance, marketing and affordable housing matters in connection with projects in CT and other states; projects include new construction, renovation, mill conversion, historic, scattered site, mixed use and supportive housing.
- ◆ Successfully position projects to win awards of tax credits and state funding.
- ◆ Prepare pro formas to aid clients considering acquisitions and loan workouts.
- ◆ Oversee income and sale price compliance for single family workforce housing development.

THE COMMUNITY BUILDERS, Boston, MA, 2007-2015

Senior Project Manager

- ◆ Led multiple large mixed-income development projects in MA and CT, from feasibility through completion.
- ◆ Assembled and managed multi-disciplinary development teams; mentored junior staff.
- ◆ Obtained federal and state LIHTC and historic tax credits, and hard and soft fund commitments, including TE bonds, NIBP, HUD green retrofit, WAP, AHT, CIPF, CBH, CPA, FCF & CHAMP.
- ◆ Drove development process: due diligence, development pro formas, entitlements, public process, HUD approvals, design, construction costing, market analysis, schedule, partner and agency updates, architectural and construction contracts, legal documents and closing.
- ◆ Oversaw construction on schedule and on budget, requisitions, cost certification, capital calls and transition to property management.

James J. Perrine

CHESTNUT HILL REALTY, Chestnut Hill, MA, 1996-2006

Director of Investment Marketing

- ◆ Produced and executed marketing plan for conversion of 65-unit property to condominiums.
- ◆ Identified properties for company to acquire, resulting in \$24 million agreement.

Director of Brokerage Services

- ◆ Devised business plan, strategy and budget, and created profit center.
- ◆ Organized, operated and expanded two brokerage offices in Cambridge and Brookline, MA.
- ◆ Hired, trained, mentored and supervised staff of 10 professionals.
- ◆ Led team that produced company website, www.chestnuthillrealty.com.

Director, Waverly/CHR Management division

- ◆ Completed integration of acquired company into Chestnut Hill Realty.
- ◆ Oversaw management of 25 properties worth \$450,000,000.
- ◆ Developed new business.

THE WAVERLY CORPORATION, Cambridge, MA, 1983-1996

President

- ◆ Founded and led successful real estate development, marketing and management company.
- ◆ Recruited, trained, supervised and developed staff of 30 employees.
- ◆ Sponsored and operated 4 real estate limited partnerships and 5 joint ventures.
- ◆ Conducted extensive property searches and analyses on over 100 investment properties.
- ◆ Executed the acquisition, redevelopment and re-sale of 15 properties in Massachusetts, New Hampshire and Rhode Island consisting of apartments, office and land.
- ◆ Successfully renovated and marketed over 670 condominium units.
- ◆ Established property management affiliate, Waverly Management; expanded it to become the largest condominium manager in Cambridge, MA; sold it at a profit to Chestnut Hill Realty.
- ◆ Established brokerage affiliate, Century 21 Waverly Properties, specializing in residential and commercial brokerage and project marketing.
- ◆ Set company strategy; maintained investor and lender relations; oversaw HR and accounting.

HARVARD SQUARE INVESTMENT ASSOCIATES, Cambridge, MA, 1977-1983

Senior Vice President; Director of Operations; Sales Manager

- ◆ Started out renting apartments and selling condominiums; eventually ran all real estate operations in Cambridge, MA and Columbia, SC, encompassing 600 units.
- ◆ Redeveloped and sold apartment buildings.
- ◆ Oversaw drafting of condominium documents and budgets.
- ◆ Turned around failing 200-unit condominium project in Columbia, SC.

Education

MASSACHUSETTS INSTITUTE OF TECHNOLOGY, Cambridge, MA

Master of Science in Real Estate Development

HARVARD COLLEGE, Cambridge, MA

Bachelor of Arts, *cum laude*, concentration in Government

Personal

Enjoy travel, cooking, music, astronomy, languages, hiking and coaching youth soccer.

Prior Development Experience

James J. Perrine

Project	Type	No. Units	Year Completed	Total Development Cost	Unusual Aspects	JJP Role
Maplewood School Residences, Gloucester, MA	Convert school to condos – in construction	12	–	4,860,000		Developer: RFP response, financing, entitlement, closing, construction, marketing
Yarmouth Gardens, West Yarmouth, MA	New construction -- proposed, in process of obtaining tax credits	40	–	13,960,000		Developer: Feasibility, pro forma, response to RFP, design oversight, entitlements, financing
340+ Dixwell Apartments, New Haven, CT	New construction (Mass Timber) -- proposed, in design	70	–	22,200,000		Consultant: Feasibility, pro forma, timeline
Canterbury Estates, Oxford, CT	New construction single family homes for sale	42	2018	n/a		Consultant: Fair housing marketing; compliance with affordability restrictions
Brookside Commons Apartments, New Milford, CT	New construction - complete, in lease-up	12	2018	4,213,500	Environmental cleanup, supportive services	Consultant: Design review, pro formas, obtaining state tax credits, negotiating with supportive services provider, environmental cleanup, requisitions, reporting
Brick Hollow Apartments, Hartford, CT	Existing	50	2017	n/a		Consultant: Asset management, improve operating results
Day Village Townhomes, Dundalk, MD	Acquisition/rehab	400	2016	65,633,000		Consultant: Pro formas, Maryland funding programs
Victoria Gardens, Waterford, CT	New construction, senior housing	90	2016	17,826,000	Flood plain	Consultant: Pro forma, flood plain issues, tax credit award
Pressley Ridge, Charlotte, NC	Acquisition/rehab	504	2016	55,112,000		Consultant: Evaluate loan documents, pro formas, North Carolina funding programs
Park West Apartments, Vernon, CT	Rehab; new community building	190	2015	28,085,000	Dredging & site drainage	Project Manager: Feasibility, pro formas, due diligence, wetlands & drainage engineering, design, public hearings, legal structuring, financing, HUD approvals, construction bidding & contracts, closing, construction oversight
Windham Mills, Willimantic, CT	Historic mill rehab; mixed use	100-125	2015	43,750,000	14 buildings	Consultant: Feasibility, pro formas, zoning review, consultant selection, project schedule
Mashpee Village Apartments, Mashpee, MA	Rehab; wastewater treatment plant	145	2015	19,525,000	Tax structuring: prior TCX/1602	Project Manager: Feasibility, pro formas, due diligence, Wastewater Treatment Plant alternatives & engineering, design, public hearings, legal structuring, financing, construction bidding & contracts, closing, construction oversight
The Aurora, Worcester, MA	Recapitalization	85	2015	1,550,000	SRO; existing debt exceeded property value	Workout Manager: Negotiated forgiveness of old debt on behalf of owner and obtained new financing to meet capital needs
Kensington Square I, New Haven, CT - Scattered Site	Scattered Site Rehab	120	2015	20,820,000	Turned around relations with Mayor; crime issues; neighborhood impact	Project Manager: Feasibility, pro forma, community relations, catalyze property management, work with City staff & Police Dept., design, financing, HUD approvals
Kensington Square II, New Haven, CT - Scattered Site	Scattered Site Rehab	96	2015	25,990,000	Turned around relations with Mayor; crime issues; neighborhood impact	Project Manager: Feasibility, pro forma, community relations, catalyze property management, work with City staff & Police Dept., design, preliminary funding applications
Depot Crossing, Wareham, MA	Rehab - garden apartments	32	2014	7,080,000		Project Manager: Final due diligence, construction bidding & contracts, closing, construction oversight through completion, conversion to perm loan, final cost certification

James J. Perrine

Project	Type	No. Units	Year Completed	Total Development Cost	Unusual Aspects	JJP Role
Chester A. Bowles Park, Hartford, CT	Potential acquisition, demolition and new construction	461	2014	125,200,000	Public housing propeprty	Acquisition: Inspection; due diligence; design; proposal narratives; phasing schedule; team coordination
Central Grammar Apartments, Gloucester, MA	Historic Rehab, senior housing	80	2012	18,993,000	Former school; Virginia state tax credit case; first City CPA funding	Project Manager: Feasibility, pro formas, due diligence, design, historic credits, public hearings, legal structuring, financing, construction bidding & contracts, closing, construction oversight through completion, conversion to perm loan, final cost certification
Cass House, Roxbury, MA	Potential acquisition/rehab	111	2011	11,233,000	Lender in possession	Acquisition: Lead acquisition team: inspection, due diligence, analysis, offer
Franklin Park Apartments, Dorchester, MA - scattered site	Scattered Site Rehab	224	2010	38,589,000	1st multifamily Weatherization funding in MA	Project Manager: Feasibility, pro formas, due diligence, design, public hearings, legal structuring, financing, 1st MF Weatherization funds, construction bidding & contracts, closing, construction oversight through completion, conversion to perm loan, final cost certification
Cheriton Grove Apartments, West Roxbury, MA	Mid-rise Rehab, senior housing	60	2010	13,727,000	HUD Green Retrofit; building addition for 2nd elevator	Project Manager: Pro formas, due diligence, design revisions, HUD Green Retrofit grant, legal structuring, financing & pre-closing
Charlesview Residences, Brighton, MA	New construction - mid rises & townhouses	240	2008	143,075,000	Harvard University land swap; contaminated soil, garage under entire project	Project Manager: Pro forma, due diligence, purchase and sale agreement, environmental issues, entitlements, public hearings, design revisions, early OneStop applications
Rte 7 Parcel, Lenox, MA	Land - 40 ac	n/a	2008	650,000	40 acres	Developer, GP: Acquisition, due diligence, public hearings, closing, design, sale
Walden-Concord Building, Cambridge, MA	Apartments & retail: convert to condos	11	2006	3,300,000	Retail and residential condos	Developer, GP: Acquisition, due diligence, closing, property management, rehab, marketing, sale
Newton Park, Brighton, MA	Apartments: convert to condos	74	2005	6,290,000		Project Manager: Development budget, marketing, rehab
Harvard Square Apartments, Cambridge, MA	Apartments: convert to condos	107	1998	4,500,000	Rent Controlled	Developer, GP: Acquisition, due diligence, closing, property management, rent increases, rehab, marketing, sale
Linden Street Apartments, Everett, MA	Apartments	7	1997	325,000		Owner. Acquisition, operation, property management, sale
Pearl Street Apartments,	Apartments	26	1996	1,450,000	Adversely affected by welfare reform	Developer, GP: Acquisition, due diligence, closing, property management, rehab, sale
Swiss Village, Westfield, MA	Apartments: convert to condos (not-owned)	44	1990	2,000,000		Marketing Agent: Negotiate marketing/development contract, due diligence, rehab, marketing, sale as condos
North Main Medical Offices, Providence, RI	Medical Offices	n/a	1990	1,500,000		Developer, GP: Acquisition, due diligence, closing, property management, leasing, tenant fit up, sale
Park West, West Springfield, MA	Apartments: convert to condos	80	1989	7,200,000		Developer, GP: Acquisition, due diligence, closing, property management, rehab, marketing, sale
15-17 Washington Street, Newburyport, MA	Apartments: convert to condos	3	1989	420,000		Owner: Acquisition, operation, property management, renovation, sale
Brush Hill, West Springfield, MA	Apartments: convert to condos	80	1987	6,400,000		Developer, GP: Acquisition, due diligence, closing, property management, rehab, marketing, sale
Brush Hill II Parcel, West Springfield, MA	Permitted land	n/a	1987	985,000	5 acres	Developer, GP: Acquisition, due diligence, closing, design, sale to another developer

James J. Perrine

Project	Type	No. Units	Year Completed	Total Development Cost	Unusual Aspects	JJP Role
The Orchard at Plummer Hill, Belmont, NH	Apartments: convert to condos	40	1986	2,000,000	Negotiate contract with newly created water utility	Developer, GP: Acquisition, due diligence, closing, public hearings, property management, rehab, marketing, sale
Central Building, Lowell, MA	Commercial - historic rehab	n/a	1984	400,000	City grants; Senator Tsongas	Developer, GP: Acquisition, due diligence, grants from City, financing, exploratory demolition, sale to end user
Middleborough, Columbia, SC		192	1982			Project Manager: Turned around struggling condominium project; improved property management; sold units to investors
Cambridge House, Cambridge, MA	Apartments: convert to condos	36	1980	2,160,000	Structural reinforcement of building while occupied	Project Manager: Development budget, pricing, structural reinforcement, rehab, marketing, property management
29 Concord Avenue, Cambridge, MA	Apartments: convert to condos	103	1980	3,605,000	Convert 75 studios to one bedrooms	Project Manager: Development budget, pricing, condo documents, rehab, marketing, property management
Continental Gardens, Cambridge, MA	Apartments: convert to condos	48	1978	2,400,000	Parking lot lease	Sales Manager: Condo sales, unit fit-up, property management

1.d – Purchasing Entity – Borrower and Guarantor

The single-purpose entity that will purchase, own and develop the site, and borrow the funds needed for the development, will be a limited partnership formed especially for this project. The limited partner will be a tax credit investor, most likely a bank or insurance company. The general partner will be a single-purpose limited liability company that is owned and controlled by CCD. Construction completion and other required guarantees will be given by CCD and by CCD Capital, LLC.

1.e – Principals

The principals of CCD are:

- James J. Perrine, 1588 Cambridge Street, Cambridge, MA 02138
- William J. Cleary, 14 Concord Avenue, Cambridge, MA 02138

To the best of our knowledge, there are no legal or administrative actions past, pending or threatened that could relate to the conduct of CCD, the Proponent or its Principals and affiliates.

There are no unpaid local, state or federal taxes due and outstanding owed by CCD or its Principals or affiliates. Please see Tax Compliance Certificate in Section 6.

To the best of our knowledge, there are no unpaid local, state or federal taxes due and outstanding owed by any member of the Development Team.

1.f – Management Agent Profile

Commonwealth Community Developers, LLC

A.J. Johnson Consulting Services, Inc.

Property Management Profile

Successful affordable housing management is highly complex -- it demands specialized skills and close attention to detail.

At CCD, we have the deep programmatic knowledge and practical hands-on experience to effectively manage affordable and mixed income housing. More importantly, we have the commitment to do it well.

Jim Perrine, our president, has over 30 years' experience in property management and affordable housing – including having previously started a successful management company, Waverly Management, that grew under his leadership to manage over 1,000 units.

Under Jim's guidance, CCD exhaustively addresses the complexity and detail inherent in affordable housing with practical management knowledge, governmental program experience, sound financial analysis, careful resident selection methods, and focused supervision.

CCD's property management is guided by the following principles:

- Create a collegial team of exceptional people from diverse backgrounds who are committed to providing exemplary service.
- Never forget the basics: to provide a clean, safe, attractive, well-maintained property which our residents will be proud to call home. Just because a property is affordable, doesn't mean it shouldn't be managed as well as any market-rate property.
- Operate the property as if it were your own. Manage in a way that promotes the long-term interests of the property owner. Keep a close eye on the bottom line.
- Provide prompt, courteous, top-notch service to the residents – it shows them respect, makes their lives easier and builds good will for the future.
- Perform preventative maintenance on schedule – it cuts down on service interruptions and saves money.
- Adhere to the schedule of quarterly, semi-annual and annual inspections of the physical plant and grounds and reviews of the managerial systems and files.
- Communicate fully and freely with all stakeholders.
- Know the importance of planning for the long-term, to avoid running into problems with unaddressed capital needs, declining NOI or other issues.
- Excel at careful budgeting and tight cost control – especially for properties with restricted incomes. Always tease out the best way to improve the properties' financial and physical condition with the funds available.

- Commit to sustainability. All too often, the controls of highly-efficient heating systems are adjusted by poorly-trained maintenance technicians, with the result that a good portion of the anticipated energy savings are not realized. Or drought-resistant native plantings are replaced with flowers that need to be watered every day. Good management can make sure that the benefits of sustainable development are maintained into the future.
- And be all about compliance, to ensure seamless conformity with the requirements of each tax credit, funding and rental assistance program at each property.

Extensive income screening, strict adherence to fair housing laws, and accurate tenant file maintenance are but a few of the aspects that shape efficient management strategy. Avoiding discrimination issues, keeping abreast of state and national fair housing law, and generating topical operating reports for funding entities, investors, and regulators require a deft, experienced hand.

Jim oversees the company's screening and compliance efforts. He is knowledgeable about compliance, having advised a number of project managers over the years. He has taken Spectrum's compliance courses (see certificates attached), but more than that, he has recently put together and presented a compliance training program for the staff of a new rental development in Essex, CT.

CCD has arranged with A.J. Johnson, our off-site compliance monitoring experts, to review every tenant file for completeness and compliance. A tenant is not given the final okay for an apartment until A.J. Johnson approves the file.

Residents of affordable housing thrive with high-value management. We know that affordable housing is the base upon which people build happy, productive lives. But shelter alone is not always sufficient for residents' success and well-being. An important part of our job is therefore to provide them with a platform from which they can succeed. That's why we make sure that each site has staff to connect our residents with the services and support they need. For smaller properties, the site manager will take these responsibilities; in larger properties, there will be one or more Resident Service Coordinators. Either way, they arrange on-site programs tailored to residents' needs and connect residents with services available in the community.

On-site programs may include out-of-school programs for children and teens, English for Speakers of Other Languages, housing and financial stability, job skills, job search, and senior programs such as yoga and brain fitness. We create a comprehensive listing of the best area service providers and local agencies to whom we can refer our residents. Such services may include home care, meal programs, case management, transportation assistance, legal services, resident advocacy, assistance with Medicare, well-being checks, drug treatment and much more.

Apartment Management Services Offered:

Financial Services

- Monitoring and maximizing financial results
- Resolute rent collection
- Timely payment of operating expenses and debt service
- Bank account reconciliation

- Monthly financial reports, including supporting documents such as rent rolls/ AR & AP ledgers, bank statement reconciliations
- Actual to budget variance analysis
- Coordination of year-end accounting with CPA
- Preparation of operating and capital budgets

Management Services

- Compliance with governmental regulations such as management reviews and physical inspections
- Maintain good professional relations with agencies, lenders and investors
- Lease compliance
- Emergency response
- Receipt of and response to tenant service requests and concerns
- Risk management
- Frequent and Open communication

Facilities Management

- Contractor and employee supervision
- Routine and emergency repairs
- Bidding major capital jobs
- Supervision of physical improvement work
- Safety and maintenance inspections
- Preventive and scheduled maintenance

Leasing Services

- Maintain high occupancy
- Cost-effective advertising and promotion
- Affirmative Fair Housing marketing and outreach
- Prospective resident screening and qualifying
- Preparation of leases
- Disclosures for lead paint, sex-offender compliance and other similar requirements
- Documentation of unit condition at move-in and move-out

Resident Services

- Connect residents with the services and support necessary to enable them to remain living independently and safely in housing and to flourish in other areas of their lives
- Empower residents to build strong communities and to find creative solutions to any problems or issues.
- Conduct confidential one on one client assessments to identify appropriate community services or activities that enhance quality of life.
- Arrange community-building and educational activities and classes in the community room.

Specialized Skills. Attention to Detail. Ongoing Commitment. When you examine our skills, experience, and companywide commitment, we're confident you'll find we're the highest value in affordable housing management.

JAMES J. PERRINE

1588 Cambridge Street
Cambridge, MA 02138
jimperrine@comcast.net

617-894-2512 (c)
617-876-2610 (h)

Summary

Strategic, versatile leader with extensive experience in affordable and market housing, real estate development, finance, investment, property management, and commercial and residential brokerage.

Professional Experience

COMMONWEALTH COMMUNITY DEVELOPERS, Cambridge, MA, 2017-Present

President

- ◆ Founded the Company to acquire, develop, finance, syndicate, construct, renovate, own and manage affordable, mixed-income and market-rate housing.
- ◆ Sets corporate goals and strategy.
- ◆ Initiates and leads the Company's real estate development activities, including: site selection, feasibility analysis, due diligence, purchase negotiation, entitlements, deal structuring, contracts, design, debt and equity financing, closing, construction, marketing, lease-up and occupancy.
- ◆ Authored successful proposal to build 40 affordable units in Yarmouth, MA; completed entitlements; managed design process; structured financing.
- ◆ Leads the Company's property management activities.
- ◆ Oversees the administrative affairs of the Company.

ALODGIO CONSULTING (f/k/a The Roche-O'Donnell Group), New Haven, CT, 2015-present

Senior Consultant

- ◆ Advise private, nonprofit and housing authority clients on best strategies for development, finance, marketing and affordable housing matters in connection with projects in CT and other states; projects include new construction, renovation, mill conversion, historic, scattered site, mixed use and supportive housing.
- ◆ Successfully position projects to win awards of tax credits and state funding.
- ◆ Prepare pro formas to aid clients considering acquisitions and loan workouts.
- ◆ Oversee income and sale price compliance for single family workforce housing development.

THE COMMUNITY BUILDERS, Boston, MA, 2007-2015

Senior Project Manager

- ◆ Led multiple large mixed-income development projects in MA and CT, from feasibility through completion.
- ◆ Assembled and managed multi-disciplinary development teams; mentored junior staff.
- ◆ Obtained federal and state LIHTC and historic tax credits, and hard and soft fund commitments, including TE bonds, NIBP, HUD green retrofit, WAP, AHT, CIPF, CBH, CPA, FCF & CHAMP.
- ◆ Drove development process: due diligence, development pro formas, entitlements, public process, HUD approvals, design, construction costing, market analysis, schedule, partner and agency updates, architectural and construction contracts, legal documents and closing.
- ◆ Oversaw construction on schedule and on budget, requisitions, cost certification, capital calls and transition to property management.

James J. Perrine

CHESTNUT HILL REALTY, Chestnut Hill, MA, 1996-2006

Director of Investment Marketing

- ◆ Produced and executed marketing plan for conversion of 65-unit property to condominiums.
- ◆ Identified properties for company to acquire, resulting in \$24 million agreement.

Director of Brokerage Services

- ◆ Devised business plan, strategy and budget, and created profit center.
- ◆ Organized, operated and expanded two brokerage offices in Cambridge and Brookline, MA.
- ◆ Hired, trained, mentored and supervised staff of 10 professionals.
- ◆ Led team that produced company website, www.chestnuthillrealty.com.

Director, Waverly/CHR Management division

- ◆ Completed integration of acquired company into Chestnut Hill Realty.
- ◆ Oversaw management of 25 properties worth \$450,000,000.
- ◆ Developed new business.

THE WAVERLY CORPORATION, Cambridge, MA, 1983-1996

President

- ◆ Founded and led successful real estate development, marketing and management company.
- ◆ Recruited, trained, supervised and developed staff of 30 employees.
- ◆ Sponsored and operated 4 real estate limited partnerships and 5 joint ventures.
- ◆ Conducted extensive property searches and analyses on over 100 investment properties.
- ◆ Executed the acquisition, redevelopment and re-sale of 15 properties in Massachusetts, New Hampshire and Rhode Island consisting of apartments, office and land.
- ◆ Successfully renovated and marketed over 670 condominium units.
- ◆ Established property management affiliate, Waverly Management; expanded it to become the largest condominium manager in Cambridge, MA; sold it at a profit to Chestnut Hill Realty.
- ◆ Established brokerage affiliate, Century 21 Waverly Properties, specializing in residential and commercial brokerage and project marketing.
- ◆ Set company strategy; maintained investor and lender relations; oversaw HR and accounting.

HARVARD SQUARE INVESTMENT ASSOCIATES, Cambridge, MA, 1977-1983

Senior Vice President; Director of Operations; Sales Manager

- ◆ Started out renting apartments and selling condominiums; eventually ran all real estate operations in Cambridge, MA and Columbia, SC, encompassing 600 units.
- ◆ Redeveloped and sold apartment buildings.
- ◆ Oversaw drafting of condominium documents and budgets.
- ◆ Turned around failing 200-unit condominium project in Columbia, SC.

Education

MASSACHUSETTS INSTITUTE OF TECHNOLOGY, Cambridge, MA

Master of Science in Real Estate Development

HARVARD COLLEGE, Cambridge, MA

Bachelor of Arts, *cum laude*, concentration in Government

Personal

Enjoy travel, cooking, music, astronomy, languages, hiking and coaching youth soccer.

A. J. Johnson Consulting Services, Inc.

757-259-9920

contact@ajjcs.net

A.J. Johnson Consulting Services, Inc. offers a comprehensive package of services for clients in the multifamily housing industry, ranging from a variety of training offerings to a complete set of asset management services.

Following is a description of the basic services we offer, beginning with asset management and compliance. Note that the asset management component is broken down into four different levels of review, depending on the needs of the client.

Tax Credit Reviews

- [Desk Audit](#)

The desk audit or, “pre-concurrence” service is one of the most popular services we offer. This is a straightforward process during which we review tenant or applicant files that are sent to us via secure upload to our server. We then provide a report to the client outlining any issues noted with the file and recommending corrections. We guarantee consistency in methodology and findings by having the same two people review all files and prepare the final report; those two people are a staff Compliance Consultant, and A. J. Johnson. The staff professional performs the detailed review of the file, noting discrepancies and recommending corrections. The report is then reviewed by Mr. Johnson, at which time final recommendations are made and credit risk is assessed.

This very affordable service provides our clients with a rapid way to meet the IRS requirement of demonstrating due diligence in the tenant approval process.

- [Section 42 Procedural Review](#)

Section 42 procedural reviews examine all aspects of tax credit operations on a property, and will cover the following areas:

- Confirmation of minimum set aside
- Examination of in service date relative to lease up deadlines
- Review of special set asides
- Examine Extended Use Agreement and ensure that requirements of the Agreement are met
- If multiple financing programs are used, ensure that site complies with requirements of those programs
- If there are mixed income buildings, analyze the applicable fraction requirements of the buildings
- Examine Deep Rent Skewing requirements (if applicable)
- Review the property for compliance with the accessibility and adaptability requirements of the Fair Housing Act of 1988 (if applicable)
- Determine if non profit partner is materially participating (if applicable)
- Examine issues relating to model units, employee units, and courtesy officer units
- Review any optional fees charged to residents for appropriateness under Section 42

- Determine if rent and utility allowance levels are appropriate
- Ensure that correct income limits are being used on site
- Analyze site policies relative to rental to Section 8 recipients
- Analyze methodology for tracking units under the Next Available Unit rule
- Determine how original resident files are being secured and whether copies of such files have been made for off site storage
- Review of 15 resident files to determine if procedures are adequate to ensure that tenant qualification and documentation requirements are being met
- [Tax Credit Eligibility Review](#)

An eligibility review is designed only to determine the eligibility of the residents. Basically, income and student status issues are reviewed and an opinion regarding the eligibility of each household is given. Each file is examined for eligibility (e.g., recertifications, file organization, document dating, etc. are not examined). This level of review is normally requested by investors concerned with resident eligibility issues.

- [Asset Management & Limited Compliance](#)

This review includes all information listed under the asset management review section, plus a procedural review designed to determine if the site staff's procedures are in conformance with the requirements of the Section 42 Program. The compliance portion of the review is limited to a confirmation of correct income and rental levels, and a review of five (5) resident files to determine if tenant qualification procedures are adequate.

- [Asset Management & Full Compliance](#)

This is the most comprehensive review we offer on a regular basis. It includes all elements of the asset management review and full procedural review.

- [Full Tax Credit Compliance Review](#)

A full tax credit compliance review will examine all elements of tax credit compliance, including a review of set-aside requirements, rent levels, utility allowance documentation, income limits, employee units, optional fees, file storage policies, available unit tracking compliance, and fair housing accessibility compliance.

Resident files from each property will be reviewed for procedural compliance with the tenant certification and verification requirements of the Section 42 program. Each file is reviewed for the purpose of determining whether the property meets the compliance requirements of the Section 42 Program.

This is a very detailed audit of all resident files that basically examines every document in each file in order to make the most complete assessment possible regarding the status of the unit. This review is designed to identify both eligibility and compliance issues.

Following each review (except desk audits), we conduct an exit interview with site staff during which we make recommendations relative to improving on site practices in whatever areas we have reviewed.



WESTMINSTER SENIOR HOUSING PROPOSAL

DEVELOPMENT TEAM EXPERIENCE - ARCHITECTURE AND ENGINEERING

Commonwealth Community Developers Inc. has selected Winslow Architects and its A/E Team to design and administer construction of the Westminster Senior Housing development. This team was selected because of its deep roots in the design and development of multifamily housing - with a particular specialization in affordable housing with community development organizations.

Members of this AE Team under the leadership of Winslow Architects Inc. have worked together on many other housing developments and would welcome an opportunity to work together again on the design and construction of the Westminster Senior Housing development. A full description of this AE Team is set forth in the following exhibits:

The Winslow A/E Team members are as follows:

ARCHITECT WINSLOW ARCHITECTS INC. ARLINGTON, MA
WINSLOW ARCHITECTS INC. has specialized in the design and construction administration of affordable housing for 35 years. The firm has expanded its focus recently to include the design of senior and community centers - currently in Framingham and in Halifax..

CIVIL HANCOCK ASSOCIATES MARLBOROUGH, MA
Hancock Associates has been recognized in Eastern Massachusetts as a leader in land development since 1978. Hancock has 5 offices – with the Marlborough office serving Westminster and Metro West areas. It provides services for Land Surveying, Civil Engineering and Geo-Technical Engineering and Wetland Science. In addition to these services, Hancock also provides complete Peer Review services representing Municipalities and local Boards with land development proposals and has a good understanding of both the public and private sector concerns.

ENERGY NEW ECOLOGY INC. BOSTON, MA
NEW ECOLOGY INC. is a non-profit green building and sustainable design firm, providing sustainable building services for both new construction and rehabilitation of many building types, including over 5,000 units of multifamily housing. The scope of work includes leading integrated design teams, facilitating design charrettes, providing technical assistance on sustainable design, writing specifications that ensure that projects are built as intended.

For each of the services listed above (except desk audits), a written report will be provided to the client within 21 days after completion of the review.

In addition to site based services, we also offer services at the corporate level, including analysis of corporate compliance operations, review and preparation of company policies, development of Tenant Selection Plans and Emergency Preparedness Plans.

We have the ability to tailor our review services to the needs of individual clients (e.g., desk audits, pre-concurrence reviews, fair housing reviews, etc.), but our experience has shown that most clients benefit from the review levels outlined above.

Training

We offer a variety of training sessions, both public and private, covering a wide range of topics relevant to the affordable housing industry. We are also able to cater training sessions to suit your specific needs.

For more information about training sessions we are currently offering as well as how to get in touch with us to build solutions to your training needs, please visit the [Training](#) page of our website.

Regularly Offered Training Sessions:

- [Management of LIHTC Projects – Basic](#)
- [Management of LIHTC Projects – Intermediate](#)
- [Management of LIHTC Projects – Advanced](#)
- [File Management & Documentation for LIHTC Projects](#)
- [Fair Housing](#)
- [Tax Exempt Bonds](#)
- [HOME Program Requirements](#)
- [Public Housing/RAD Program](#)
- [Marketing of Affordable Housing Developments](#)
- [Rural Housing Section 515 Program](#)
- [HUD Section 8 Program](#)
- [Dealing with Tenant Assets](#)
- [Income Verification & Calculation \(1/2 day\)](#)
- [Income & Asset Verification & Calculation \(full day\)](#)
- [Understanding the Requirements of the IRS 8823 Guide](#)
- [Time Management for Property Managers](#)
- [Interviewing Techniques & Skills for Affordable Housing Managers](#)

We represent many of the major real estate investors in the United States, such as AIG Global Real Estate Investment Corp., JP Morgan, Boston Financial, and SunTrust in the performance of on site management reviews. We also work with individual management companies and developers to assist them in ensuring that their properties are properly structured and well managed.

If you feel that any of these services would benefit your organization, please give us a call and we will develop a program specifically for your needs. If you would like to speak to any of our existing clients, please let us know and we will provide you with a contact list.

1.g – Other Development Team Members

Design Team

1. Architect: Winslow Architects, Inc., Arlington, MA
2. Civil Engineer: Hancock Associates, Marlborough, MA
3. Energy Consultant: New Ecology, Inc., Boston, MA
4. Mechanical/Electrical/Plumbing/ Fire protection Engineer: Norian Siani Engineering, West Concord, MA
5. Structural Engineer: D.M. Berg Consultants
6. Landscape Architect: Hammer + Walsh Design, Boston, MA
7. Code Consultant: AKF Group, Boston, MA
8. Cost Estimator: A.M. Fogerty, Hingham, MA

Contractor: Delphi Construction, Inc., Waltham, MA

Attorney: Klein Hornig¹, Boston, MA

¹ This is our regular firm, but we have not yet engaged them for this development.

**LANDSCAPE****HAMMER + WALSH DESIGN****BOSTON, MA**

HAMMER + WALSH DESIGN provides complete landscape design services to both public and private sector clients. The firm has specialized in work for Local Housing Authorities and for private developers of affordable housing. H+W has developed expertise in use of cost-effective construction techniques and plants and hardscape materials that require minimal maintenance.

MEP/FP**NORIAN SIANI ENGINEERING****W. CONCORD, MA**

Norian Siani is a 35 year old energy oriented consulting engineering firm with expertise in virtually all phases of mechanical, electrical, plumbing and fire protection building systems, sustainable system design and energy reduction projects. Norian Siani has practiced "sustainable/Green Design" since before it received these formal names. Using energy efficiency concerns as a constant filter, our design decisions are grounded by more than first cost and expediency.

STRUCTURAL**DM BERG CONSULTANTS****NEEDHAM, MA**

For four decades, DM Berg has provided full structural engineering services to its clients – public and private sector Owners, Developers, municipalities and other architectural and engineering professionals. DM Berg provides structural engineering services for building analysis and design, renovation of existing structures, failure analysis/forensics, historical preservation, building envelope investigations and comprehensive on-site surveys.

CODE**AKF GROUP****BOSTON, MA**

The AKF Group provides a specialized expertise in the application and interpretation of the International Building Codes (IBC) and related codes pertaining to accessibility, sustainability, life and fire safety. AKF Code Reports are comprehensive and customizable for each building tailored to the existing conditions and proposed scope of work.

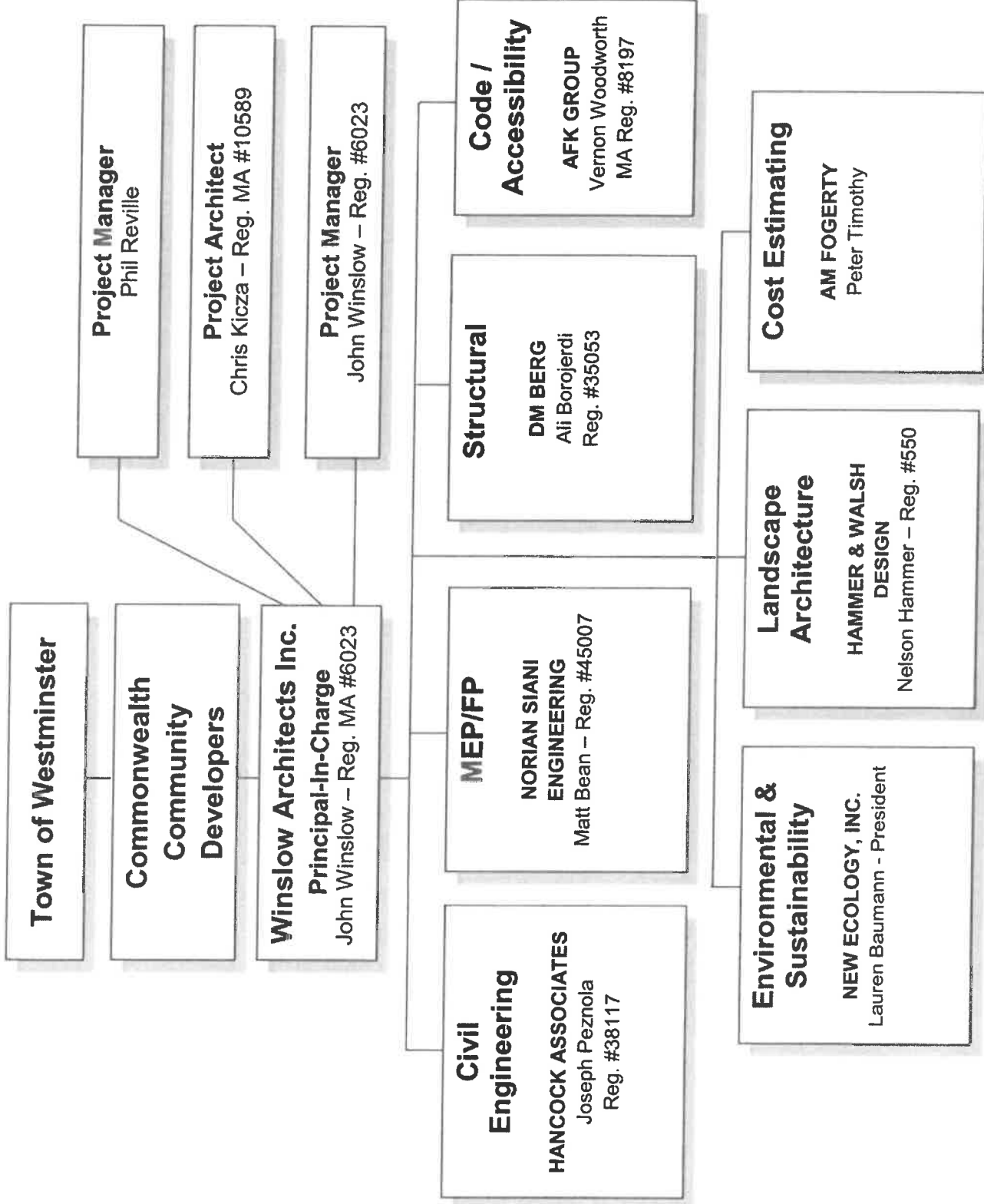
COST ESTIMATING AM FOGERTY**HINGHAM, MA**

AM Fogerty has been providing independent construction cost estimating services for over 50 years. Led by Peter Timothy since 2000, AM Fogerty has provided estimating and budgeting services for many large scale restoration projects, MBTA, MHFA and HUD and DHCD funded projects.

The experience and qualifications of the Winslow AE Team are more fully described in the following documents:

1. Standard Designer Application for Municipalities and Public Agencies
2. Corporate Descriptive materials and resumes on each AE Team Member.

6. List **ONLY** Those Prime And Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm And Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:



<p>7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.</p>	
<p>a. Name and Title Within Firm:</p> <p>JOHN WINSLOW - PRESIDENT</p>	<p>a. Name and Title Within Firm:</p> <p>CHRIS KICZA – SENIOR PROJECT ARCHITECT</p>
<p>b. Project Assignment:</p> <p>PROJECT ARCHITECT</p>	<p>b. Project Assignment:</p> <p>PROJECT ARCHITECT</p>
<p>c. Name and Address Of Office In Which Individual Identified In 7a Resides:</p> <p>WINSLOW ARCHITECTS, INC. 89 MASS. AVENUE – ARLINGTON, MA 02474</p> <p> <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDVOBE <input type="checkbox"/> VBE </p>	<p>c. Name and Address Of Office In Which Individual Identified In 7a Resides:</p> <p>WINSLOW ARCHITECTS, INC. 89 MASS. AVENUE – ARLINGTON, MA 02474</p> <p> <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDVOBE <input type="checkbox"/> VBE </p>
<p>d. Years Experience: With This Firm: <u>33</u> With Other Firms: <u>2</u></p>	<p>d. Years Experience: With This Firm: <u>1</u> With Other Firms: <u>24</u></p>
<p>e. Education: Degree(s) /Year/Specialization</p> <p>B.ARCH 1969 – TUFTS UNIVERSITY LITERATURE M.ARCH 1980 – MIT ARCHITECTURE</p>	<p>e. Education: Degree(s) /Year/Specialization</p> <p>BFA/ B.ARCH – RHODE ISLAND SCHOOL OF DESIGN 1993</p>
<p>f. Active Registration: Year First Registered/Discipline/Mass Registration Number</p> <p>1984/ REG. MA #6023</p>	<p>f. Active Registration: Year First Registered/Discipline/Mass Registration Number</p> <p>2001/ REG. MA #10589</p>
<p>g. Current Work Assignments and Availability For This Project:</p> <p>MR. WINSLOW IS RESPONSIBLE FOR THE DESIGN AND PROJECT MANAGEMENT OF ALL RECENT AND CURRENT PROJECTS FOR WINSLOW ARCHITECTS – INCLUDING NEW CONSTRUCTION AND BUILDING ENVELOPE MODERNIZATION FOR PROJECTS SUCH AS THE FOLLOWING:</p> <ul style="list-style-type: none"> • HALIFAX SENIOR CENTER – HALIFAX • PELHAM COMMUNITY LEARNING CENTER – FRAMINGHAM. • 50 YORK STREET – 16 UNITS AFFORDABLE HOUSING • YARMOUTH GARDENS – 40 UNITS AFFORDABLE HOUSING • MEFIELD GREEN – 40 UNITS SALES AND RENTAL HOUSING <p>MR. WINSLOW IS FULLY AVAILABLE TO OVERSEE THE DESIGN AND CONSTRUCTION ADMINISTRATION OF THIS PROJECT.</p>	<p>g. Current Work Assignments and Availability For This Project:</p> <p>CHRIS KICZA SERVES AS PROJECT ARCHITECT RESPONSIBLE FOR MANAGING AND DIRECTING PREPARATION OF PROJECT DOCUMENTS – PLANS, SPECIFICATIONS AND CODE COMPLIANCE -CURRENTLY WORKING ON.</p> <ul style="list-style-type: none"> • PELHAM COMMUNITY LEARNING CENTER • HALIFAX SENIOR CENTER • YARMOUTH GARDENS – 40 UNITS AFFORDABLE HOUSING. • IN-HOUSE CODE REVIEW FOR ALL PROJECTS <p>HE IS FULLY AVAILABLE TO OVERSEE PREPARATION OF CONSTRUCTION DOCUMENTS AND ADMINISTRATION FOR THIS PROJECT.</p>

h.	Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, if Not Current Firm):
<p>JOHN WINSLOW IS A GRADUATE OF TUFTS UNIVERSITY AND M.I.T. WITH OVER 35 YEARS INVOLVEMENT WITH HOUSING DESIGN AND DEVELOPMENT. HE ESTABLISHED WINSLOW ARCHITECTS 35 YEARS AGO SPECIFICALLY TO SPECIALIZE IN THE DESIGN AND CONSTRUCTION OF AFFORDABLE HOUSING - INCLUDING HOUSING DESIGN, HOUSING FINANCE, HOUSING REGULATORY PROCESSES RELATING TO CHAPTER 149 AND PUBLIC BIDDING, CONSTRUCTION DETAILING, CONSTRUCTION ADMINISTRATION, ETC.</p> <p><u>BUILDING RENOVATION/MODERNIZATION:</u></p> <ul style="list-style-type: none"> • 135 UNITS - MASHPEE, • 224 UNITS - BOSTON • 37 UNITS - LOWELL • 32 UNITS - CAMBRIDGE <p><u>PUBLIC HOUSING AUTHORITY/CHAPTER 149</u></p> <ul style="list-style-type: none"> • DHCD HOUSING AUTHORITY HOUSE DOCTOR (CURRENTLY WORKING ON 4 RE-ROOFING PROJECTS). • WELLESLEY - 12 UNIT "GUT" REHAB • FOXBOROUGH & DUXBURY - SPECIAL NEEDS HOUSING • CAMBRIDGE- SPECIAL NEEDS HOUSING • BRIDGEWATER- BATH MODERNIZATION • LEOMINSTER - KITCHEN/BATH MODERNIZATION • <p><u>NEW CONSTRUCTION (ALL 40B OR NOT-FOR-PROFIT DEVELOPERS OF AFFORDABLE HOUSING):</u></p> <ul style="list-style-type: none"> • 15 UNITS- SHERBORN, MA • 24 UNITS - BURLINGTON MA • 10 UNITS - NEWTON, MA • 15 UNITS - WESTFORD, MA • 60 UNITS - EDGARTOWN, MA • 47 UNITS - CHATHAM, MA • 23 UNITS - LOWELL, MA • 36 UNITS - WESTFORD, MA • 40 UNITS - YARMOUTH, MA • 40 UNITS - MEDFIELD, MA 	<p>CHRIS KICZA HAS WORKED FOR THE PASTS 24 YEARS WITH LARGE FIRMS DESIGNING AND CONSTRUCTING MEDICAL AND RESIDENTIAL FACILITIES THROUGHOUT THE NEW ENGLAND AREA. FOR THE PAST 10 YEARS, CHRIS HAS WORKED WITH SBA ARCHITECTS ON VARIOUS HEALTHCARE PROJECTS WITH RESPONSIBILITIES RANGING FROM DESIGN THROUGH CONSTRUCTION ADMINISTRATION.</p> <p>FOR 10 YEARS PRIOR TO THAT, CHRIS WORKED AS JOB CAPTAIN AND THEN PROJECT ARCHITECT FOR A FIRM SPECIALIZING IN MULTIFAMILY RESIDENTIAL BUILDING TYPES - BOTH NEW CONSTRUCTION AND RENOVATIONS - WITH RESPONSIBILITIES RANGING FROM DOCUMENTING EXISTING CONDITIONS THROUGH DESIGN AND CONSTRUCTION ADMINISTRATION.</p> <p>CHRIS ALSO PROVIDES EXPERTISE IN CODE REVIEW, INTERPRETATION AND PASSIVE HOUSE ENERGY EFFICIENT DESIGN.</p>

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.			
a.	Name and Title Within Firm: Joseph D. Peznola, PE Director of Engineering		
b.	Project Assignment: Project Civil Engineer		
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: Hancock Associates 315 Elm Street Marlborough, MA 01752	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDOVBE <input type="checkbox"/> VBE	Name and Address Of Office In Which Individual Identified In 7a Resides: Hancock Associates 315 Elm Street Marlborough, MA 01752 <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDOVBE <input type="checkbox"/> VBE
d.	Years Experience: With This Firm: 13 With Other Firms: 30		Years Experience: With This Firm: 6 With Other Firms: 44
e.	Education: Degree(s) /Year/Specialization BS Civil Engineering University of Lowell 1987		Education: Degree(s) /Year/Specialization BS Civil Engineering Northeastern University 1971
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number MA Civil 38117 First Registered 1994		Active Registration: Year First Registered/Discipline/Mass Registration Number: MA Civil 28779 First Registered 1977
g.	Current Work Assignments and Availability For This Project: Currently acting as the Director of Engineering for a firm with 20 engineers. Also act as a Project Manager for medium to large residential and commercial land development projects. Available to manage subject project.		Current Work Assignments and Availability For This Project: Currently working as a project Manager for several small to medium sized residential, commercial and municipal projects. Available to manage subject project.
h.	Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, if Not Current Firm): <ul style="list-style-type: none"> Hudson Zoning Board of Appeals 20 years 1994-2014 Chair Citizens Housing & Planning Association Training Subcommittee 2008-2014 Project Manager for several non-profit housing developers on several sites. Project Manager for many private sector housing developers. 		Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, if Not Current Firm): <ul style="list-style-type: none"> Project Manager for several site for Cambridge Housing Authority Project Manager for large housing project in East Boston Project Manager for Municipal Public Works Facility Berlin, MA 44 years' experience in land development engineering

7. Brief Resume of ONLY those Key Staff of Firm and Sub-Consultant Personnel requested in the Advertisement. Confine responses to the space provided on the form and limit resumes to ONE person per discipline requested in the Advertisement. Additional sheets should be provided only as required for the number of key personnel requested in the Advertisement and they must be in the format provided. By including a Sub-Consultant, the firm certifies that the listed Sub-Consultant has agreed to work on this project, should the team be selected.			
a.	Name & Title within Firm: NORIAN/SIANI ENGINEERING, INC. Sergio F. Siani, President, LEED AP Project Assignment: Project Manager	Name & Title within Firm: NORIAN/SIANI ENGINEERING, INC. Matthew A. Bean, P.E., Senior Engineer, LEED AP Project Assignment: Mechanical, Plumbing, & Fire Protection Engineer	
c.	Name and address of Office in which individual identified in 7a resides: Norian/Siani Engineering, Inc. 43 Bradford, 3 rd Floor Concord, MA 01742	Name and address of Office in which individual identified in 7a resides: Norian/Siani Engineering, Inc. 43 Bradford, 3 rd Floor Concord, MA 01742	
d.	Years experience: With This Firm: <u>25+</u> With Other Firms: <u>10</u>	Years experience: With This Firm: <u>15</u> With Other Firms: <u>3</u>	
e.	Education: Degree(s) /Year/Specialization B.S., Energy Sciences, The Evergreen State College 1975-1979 Continuing Education, Northeastern University 1980-1982 LEED Accredited Professional	Education: Degree(s) /Year/Specialization Worcester Polytechnic Institute, Worcester, MA -1992-1996 Bachelor of Science, Mechanical Engineering LEED Accredited Professional	
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 2002 Mechanical #45007	Active Registration: Year First Registered/Discipline/Mass Registration Number 2002 Mechanical #45007	
g.	Current work assignments and availability for this project: Whittier Place Codman Square NDC, Boston, MA Mass Military Division, Armory Restoration & Repairs, Various Locations Charring Cross, (55 DU), New Construction Mechanical Systems Newtowne Court, Major Renovation	Current work assignments and availability for this project: Whittier Place Codman Square NDC, Boston, MA Mass Military Division, Armory Restoration & Repairs, Various Locations 250 Beacon Street, Condominium, Electrical Service Replacement Newtowne Court, Major Renovation	
h.	Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm): Mr. Siani has thirty plus of experience in the HVAC and Mechanical Engineering Design field. Currently is responsible for design of heating, air conditioning, plumbing & fire protection systems. Expertise includes conceptual design, heating and cooling load calculations, equipment selection, construction administration, and project coordination. Experienced in a broad range of projects from both the public and private sectors. Recent projects include schools, high-end residences, churches, offices, public housing, and libraries.	Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm): Mr. Bean is a registered mechanical engineer in the State of Massachusetts and has eighteen years of experience in the HVAC and Mechanical Engineering Design field. Currently is responsible for design of heating, air conditioning, plumbing & fire protection systems. Expertise includes conceptual design, heating and cooling load calculations, equipment selection, construction administration, and project coordination. Experienced in a broad range of projects from both the public and private sectors. Recent projects include schools, high-end residences, churches, offices, public housing, and libraries.	
DHCD – House Doctor – Various Sites – Boilers & Furnaces Replacements. CHA-Jefferson Park (Federal)-Boiler Plant Replacement (184 DU) CHA-LBJ- Apartments- Renovations & New Construction (180 DU's) Winthrop HA-Golden Drive Electric Heat System Conversion QHA-Snug Harbor Development, 400 DU's –Heating Renovations		DHCD – House Doctor – Various Sites – Boilers & Furnaces Replacements. CHA-LBJ- Apartments- Renovations & New Construction (180 DU's) CHA, Cambridge - Millers River Heating Conversion Project St. Joseph Apartments 1&2, Lowell (15+22 DU's Gut Renovations) Waltham HA, Beaver Brook Apt., Heating Modernization	

7. Brief Resume of ONLY those Key Staff of Firm and Sub-Consultant Personnel requested in the Advertisement. Confine responses to the space provided on the form and limit resumes to ONE person per discipline requested in the Advertisement. Additional sheets should be provided only as required for the number of key personnel requested in the Advertisement and they must be in the format provided. By including a Sub-Consultant, the firm certifies that the listed Sub-Consultant has agreed to work on this project, should the team be selected.			
a.	Name & Title within Firm: George Comatas, P.E. Senior Engineer	a. Name & Title within Firm:	
b.	Project Assignment: Plumbing & Electrical Engineer	b. Project Assignment:	
c.	Name and address of Office in which individual identified in 7a resides: Norian/Siani Engineering, Inc. 43 Bradford, 3 rd Floor Concord, MA 01742	c. Name and address of Office in which individual identified in 7a resides:	
d.	Years experience: With This Firm: 16 With Other Firms: 6	d. Years experience: With This Firm: With Other Firms:	
e.	Education: Degree(s) /Year/Specialization Clarkson University, Potsdam, New York – 1987-1991 Bachelor of Science, Mechanical Engineering	e. Education: Degree(s) /Year/Specialization	
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 2006 Mechanical #46467	f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	
g.	Current work assignments and availability for this project: Newton Housing Authority, (13DU & office space) Heating System Replacement 300 Howard Street, Framingham, Mechanical System Upgrades Charring Cross, (55 DU), New Construction Mechanical Systems N/SE can staff project with notice to proceed.	g. Current work assignments and availability for this project:	
h.	Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm): George Comatas is a registered mechanical engineer in the State of Massachusetts and has twenty two years of experience in the HVAC and Mechanical Engineering Design field. Currently is responsible for design of heating, air conditioning, and plumbing systems. Expertise includes conceptual design, heating and cooling load calculations, equipment selection, construction administration, and project coordination. Experienced in a broad range of projects from both the public and private sectors. Recent projects include public housing elderly, family and transitional housing, high-end residences, churches, offices, and libraries. DHCD – House Doctor – Various Sites – Boilers & Furnaces Replacements. Winthrop HA-Golden Drive Electric Heat System Conversion QHA-Snug Harbor Development, 400 DU's – Heating Renovations Parkview Apartments, Affordable Housing CHA-Jefferson Park, Cambridge – Kitchen, Bath, HVAC Renovations	h. Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm):	



<p>7. Brief Resume Of ONLY Those Prime Applicant And Sub-Consultant Personnel Requested In The Advertisement. Confine Responses To The Space Provided On The Form And Limit Resumes To ONE Person Per Discipline Requested In The Advertisement. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 6. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel Requested In The Advertisement And They Must Be In The Format Provided. By Including A Firm As A Sub-Consultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.</p>			
a.	Name And Title Within Firm: Ali R. Borojerdi, P.E AP LEED.	a.	Name And Title Within Firm:
b.	Project Assignment: Structural Engineer	b.	Project Assignment:
c.	Name And Address Of Office In Which Individual Identified In 7a Resides: DM Berg Consultants, P.C. 570 Hillside Avenue Needham, MA 02494	c.	Name And Address Of Office In Which Individual Identified In 7a Resides: MBE <input type="checkbox"/> WBE <input type="checkbox"/>
d.	Years Experience: With This Firm: 15 With Other Firms: 16	d.	Years Experience: With This Firm: With Other Firms:
e.	Education: Degree(s) Year/Specialization University of Minnesota, Minneapolis, MN/MS/1986/Civil Engineering Sharif University of Tech., Tehran, Iran/BS/1976/Structural Engineering	e.	Education: Degree(s) Year/Specialization
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 1990 / Structural / 35053	f.	Active Registration: Year First Registered/Discipline/Mass Registration Number
g.	Current Work Assignments And Availability For This Project: <ul style="list-style-type: none"> Taunton Schools, Taunton, Massachusetts Waltham Watch Factory, Waltham, Massachusetts Saint Joseph High School, Lowell, Massachusetts <p>Mr. Borojerdi is the Principal-in-Charge on the above projects. Given the timelines of these projects, Mr. Borojerdi will be able to allot enough time to the project.</p>	g.	Current Work Assignments And Availability For This Project:
h.	Other Experience And Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): <p>Mr. Borojerdi is a licensed professional engineer in several states and has over 25 years of varied experience in the field of structural engineering in all phases of design and project management.</p> <p>Mr. Borojerdi has worked on various structures including: educational facilities; office, residential, and commercial buildings; parking garages; hospitals; athletic facilities; maintenance facilities; and wastewater treatment structures. Ali's work experience includes, but is not limited to: Structural analyses and designs; Investigations and reporting; Distress and failure investigations and analyses; and Independent structural engineering reviews.</p>	h.	Other Experience And Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):



7. Brief Resume Of **ONLY** Those Prime Applicant and Sub-Consultant Personnel Requested In The Advertisement. Confine Responses To The Space Provided On The Form and Limit Resumes To **ONE** Person Per Discipline Requested In The Advertisement. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question #6. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel Requested In The Advertisement And They Must Be In The Format Provided. By Including A Firm As A Sub-Consultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.

a.	Name and Title Within Firm: David Walsh, RA, RLA, LEED AP, Principal	a.	Name and Title Within Firm: Nelson Hammer, RLA, Principal
b.	Project Assignment: Principal-in-Charge	b.	Project Assignment: Project Manager
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: Hammer+Walsh Design Inc. 300 A Street, Lobby Level Boston, MA 02210-1620	c.	Name and Address Of Office In Which Individual Identified In 7a Resides: Hammer+Walsh Design Inc. 300 A Street, Lobby Level Boston, MA 02210-1620
d.	Years Experience: With This Firm: 5 With Other Firms: 31	d.	Years Experience: With This Firm: 5 With Other Firms: 42
e.	Education: Degree(s) /Year/Specialization Bachelor of Architecture 1978 Masters of Landscape Architecture 1980	e.	Education: Degree(s) /Year/Specialization BSLA/1969/Landscape Architecture
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 1983 MA Landscape Architecture # 753 1985 MA Architecture # 6328	f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 1975/Landscape Architecture/550
g.	Current Work Assignments and Availability For This Project: CharlesNEWtown Water Park 10% 2 Washington Street Housing, 10% North Hill Residences, 10% Manning Apartments, Cambridge, MA 10% Availability: 60%	g.	Current Work Assignments and Availability For This Project: Medical Office Building, Lawrence, MA 5% Tewksbury Business Park, Tewksbury, MA 10% Salisbury Police Station, 15% Temple Beth Shalom Renovation and Expansion, 10% Availability: 60%
h.	Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): While Principal with Copley Wolff Design Group worked on a number of institutional and municipal projects including the renovations to McClellan and Mellon Halls at Harvard Business School, 28 Osborne St for the Massachusetts Institute of Technology and various schoolyards and playgrounds in Boston, MA. Currently working on Frank J. Manning Apartments renovation for Cambridge Housing Authority.	h.	Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): While Owner of Hammer Design and Hammer+Walsh Design, Inc.: Extensive experience in public institutional work, including five projects for the Lexington, MA School Department; Orchard Gardens School in Roxbury; Clarendon Playground in Boston for Boston Parks and Rec; 3 projects for the Boston Schoolyard Initiative, Cambridge City Hall Annex, Cambridge, MA; Needham Senior Center, Needham, MA. Have previously collaborated with John Winslow on many projects, including the Waldo Court Housing project for the Wellesley Housing Authority. Was landscape architect for the renovation of the JFK Apartments building for the Cambridge Housing Authority in 2004, and recently completed work on the Putnam Gardens Apartments complex for the CHA..

7. Brief Resume of ONLY those Key Staff of Firm and Sub-Consultant Personnel requested in the Advertisement. Confine responses to the space provided on the form and limit resumes to ONE person per discipline requested in the Advertisement. Additional sheets should be provided only as required for the number of key personnel requested in the Advertisement and they must be in the format provided. By including a Sub-Consultant, the firm certifies that the listed Sub-Consultant has agreed to work on this project, should the team be selected.			
a.	Name & Title within Firm: A.Vernon Woodworth, FAIA, Code Consultant	Name & Title within Firm: James A. Ierardi, PhD, PE, LEED AP, Code Consultant, Partner	
b.	Project Assignment: Code Consultant	Project Assignment: Code Consultant	
c.	Name and address of Office in which individual identified in 7a resides: AKF Group LLC 99 Bedford Street, 2nd Floor Boston, MA 02111	Name and address of Office in which individual identified in 7a resides: AKF Group LLC 99 Bedford Street, 2nd Floor Boston, MA 02111	
d.	Years experience: With This Firm: 5 With Other Firms: 30	Years experience: With This Firm: 5 With Other Firms: 17	
e.	Education: Degree(s) /Year/Specialization B.A. 1974 Urban Design M.T.S. 1985 Theological Studies	Education: Degree(s) /Year/Specialization Ph.D., 2005, Fire Protection Engineering, Worcester Polytechnic Institute M.Sc., 1999, Fire Protection Engineering, Worcester Polytechnic Institute B.Sc., 1997, Mechanical Engineering, Worcester Polytechnic Institute	
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 1983 Architect Comm. Of MA License No. 8197	Active Registration: Year First Registered/Discipline/Mass Registration Number 2006/Fire Protection Engineer/MA #46918	
g.	Current work assignments and availability for this project: Amesbury Hockey Rink and Jerusalem Place Mr. Woodworth is available 100%	Current work assignments and availability for this project: South Station Office Tower Phase I – Boston, MA Walker Park Apartments Permitting – Roxbury, MA Jay's availability for this project is 30%	
h.	Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm): Mr. Woodworth has over 35 years of experience in architecture, code enforcement, and code consulting in a broad range of project sectors. He is a licensed architect in the State of Massachusetts and a member of the faculty at the Boston Architectural College. Vernon represented the AIA on the drafting committee of the International green Construction Code (IgCC), as well as on two subsequent code amendment hearing panels. He was the 2012 President of the Massachusetts Chapter of the American Institute of Architects and Currently co-Chairs the Boston Society of Architects' Committee for the Advancement of Sustainability. Relevant Projects: DCR Salisbury Campground, Salisbury, MA MCI Lancaster, Lancaster, MA Middlesex House of Corrections, Billerica, MA Wellesley ADA, Wellesley, MA	Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm): Dr. Ierardi is highly experienced in the fields of fire safety and code consulting for new construction as well as interior renovations, changes in use, and additions to existing buildings in accordance with the applicable state codes to resolve code compliance issues of varying complexity. His scope of work typically includes reviewing existing conditions, performing architectural plan review at each stage of design, preparing and updating code summary reports, and coordinating code compliance issues with the design team and authorities having jurisdiction, as necessary. His expertise also includes computer fire, smoke, and egress modeling for atrium smoke control systems and structural fire resistance analysis. He excels in resolving code-related issues that arise during renovations to existing buildings, providing solutions for building and fire department officials that meet the intent of the code. Jay was a contributing author of the SFPE Engineering Standard for Calculating Fire Exposure to Structures.	

6.	(Intentionally left blank)	
7.	Brief Resume of ONLY those Key Staff of Firm and Sub-Consultant Personnel requested in the Advertisement. Confine responses to the space provided on the form and limit resumes to ONE person per discipline requested in the Advertisement. Additional sheets should be provided only as required for the number of key personnel requested in the Advertisement and they must be in the format provided. By including a Sub-Consultant, the firm certifies that the listed Sub-Consultant has agreed to work on this project, should the team be selected.	
a.	Name & Title within Firm: Peter Timothy, President - Cost Estimator	a. Name & Title within Firm:
b.	Project Assignment: Cost Estimator	b. Project Assignment:
c.	Name and address of Office in which individual identified in 7a resides: A.M. Fogarty & Associates 175 Derby Street Hingham, MA 02043-4014 (781) 749-7272	c. Name and address of Office in which individual identified in 7a resides: MBE <input type="checkbox"/> WBE <input type="checkbox"/>
d.	Years experience: With This Firm: 2.5 With Other Firms: 4	d. Years experience: With This Firm: With Other Firms:
e.	Education: Degree(s) Year/Specialization University of Wisconsin-Platteville, 1985, Bachelor of Science Degree in Construction Management	e. Education: Degree(s) Year/Specialization
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	f. Active Registration: Year First Registered/Discipline/Mass Registration Number
g.	Current work assignments and availability for this project: We currently are estimating approximately 10 projects per month. We are very flexible increasing our work load due to the nature of our staffing	g. Current work assignments and availability for this project:
h.	Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm): Mr. Timothy has been a professional estimator since earning a BS degree in Building Construction Management in 1985. He was chief estimator for a large interior contractor. Currently, Mr. Timothy is President of A.M. Fogarty and Associates and in charge of all construction cost estimates and competitive bidding for the company. He has had extensive experience in CSI and Uniformat estimates. His project experience includes commercial building structures, court houses, schools and academic facilities, transportation projects, and numerous public projects (including DCAM projects).	h. Other experience and qualifications relevant to the proposed project: (Identify firm by which employed, if not current firm):

Current and Relevant Work By Prime Applicant Or Joint-Venture Members. Include ONLY Work Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (List Up To But Not More Than 5 Projects).					
8a.	a. Project Name And Location Principal-In-Charge	b. Brief Description Of Project And Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands) Construction Costs (Actual, Or Estimated If Not Completed) Fee for Work for Which Firm Was Responsible
(1)	PELHAM LEARNING CENTER Framingham, MA John Winslow, RA -- Principal-In-Charge 	New 8,000 sf community center building for a large affordable rental housing complex in an urban setting – including library, assembly room, youth learning center, multi-media center, technology center and offices.	MR. ROBERT ENGLER SEB Development Corp. 165 Chestnut Hill Ave. #2 Brighton, MA 02135 Tel. 617-782-2300 x 201	2018	3,000 185
(2)	POPE'S TAVERN Halifax, MA John Winslow, RA -- Principal In Charge 	Renovation + addition to historic tavern for Town of Halifax Senior Center.	TOWN OF HALIFAX John Campbell Municipal School and Building Committee 500 Plymouth Street Halifax, MA 02338 Tel. 781-589-4736	2018	1,800 125

<p>(3)</p> <p>YARMOUTH GARDENS Yarmouth, MA</p> <p>John Winslow, RA – Principal In Charge</p>  <p>40 UNITS NEW CONSTRUCTION</p>	<p>Design for new construction of 40 units of affordable rental housing designed to reflect the unique Cape Cod and New England architectural style. This project also includes a community center for senior and community activities.</p>	<p>MR. JIM PERRINE Commonwealth Community Developers 1588 Cambridge Street Cambridge, MA 02138 Tel. 617-894-2512</p>	<p>2019</p> <p>10,000</p> <p>440</p>	
<p>(4)</p> <p>MEDFIELD GREEN Medfield, MA</p> <p>John Winslow, RA – Principal-In-Charge</p>  <p>36 UNITS NEW CONSTRUCTION</p>	<p>36 units of affordable rental and sales housing on 3 acres – designed in a combination of townhouse, garden apartment and cottage style duplexes.</p>	<p>MR. JOHN KELLY Medfield Meadows LLC 12 Haven Street Dover, MA 02030 Tel. 619-794-4889</p>	<p>2018</p> <p>7,500</p> <p>350</p>	

(5)

50 YORK APARTMENTS
Cambridge, MA

John Winslow, RA –
Principal In Charge



16 UNITS NEW CONSTRUCTION

16 units of affordable rental housing in a 3-story elevator building with parking garage under – designed as a single building with a triple decker faced to reflect the character of the surrounding neighborhood.

**MR. ROBERT
MACARTHUR**

Just-A-Start Corp
1035 Cambridge St #12,
Cambridge, MA 02141
Tel. 617-494-0444 x321

2018

6,500

375

8b. List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement and They Must Be In The Format Provided.					
Sub-Consultant Name: Hancock Associates					
a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1) Coolidge at Sudbury Phases 1 and 2 189 Boston Post Road Sudbury, MA Joseph D. Peznola, PE	Phase 1 - 64 unit age restricted residential apartments. Phase 2 - 56 units age restricted residential apartments.	B'nai B'rith Housing New England Susan Gittelman, Executive Director 34 Washington Street Brighton, MA 02135 617-731-5291 susan@bbhousing.org	Phase 1 completed 2014 Phase 2 2019	\$8M	\$60,000
(2) Gornham Street Apartments 305 Gornham Street Lowell, MA Joseph D. Peznola, PE	24 unit affordable housing project with public meeting space.	Coalition for a Better Acre Yun-Ju Choi - Executive Director 516 Moody Street Lowell, MA (978) 856-6629	2015	\$4M	\$40,000
(3) Welcome Home 10 Reed Street Haverhill MA	27 unit affordable veteran's housing project located in three buildings; an eighteen unit building, a six unit building and a three family.	Coalition for a Better Acre Yun-Ju Choi - Executive Director 516 Moody Street Lowell, MA (978) 856-6629	2016	\$4M	\$30,000
(4) Berlin MA Public Works Facility	Construction of a new facility for the Town of Berlin Highway Department to serve as the base for the Highway Department with offices and repair/wash/storage space for equipment and vehicles.	Helene Karl Architects, Inc. Gregg Yanchenko, V.P. 61 Skyfields Drive Groton, MA 01450 978-449-0470	2018	\$4.1M	\$42,000
(5) Cambridge Housing Authority Multiple Sites Robert A. Chrusciel, PE	Site improvements on six CHA sites throughout Cambridge. Hancock performed a topographic survey to facilitate ADA compliance, and prepare a schematic design level civil site plans.	Winslow Architects, Inc. John A. Winslow 89 Massachusetts Avenue Arlington, MA 02474 (781) 648-6600	2018	TBD	\$60,000

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Sub-Consultant Name: Norian/Siani Engineering, Inc.					
a. Project name & location Principal-in-Charge	b. Brief description and responsibility (include reference to areas of experience listed in RFS)	c. Project Owner's name & address and owner's reference name & phone number	d. Completion Date (actual or estimated)	e. Project (Construction) Cost (000's) Construction Costs (actual, or estimated if not completed)	Fee for work for which firm was responsible
(1) Cambridge Housing Authority -- LBJ Apartments- Large Renovation & New Construction Cambridge, MA Sergio Siani, LEED AP Matthew Bean, PE, LEED AP	MEP+FP Design & CA Services. Major renovations and limited new construction for a 180 unit, 12-story, all electrically heated high rise housing development including complete systems replacement for mechanical and most of electrical and plumbing. The project began with extensive study work and performance modeling including an in depth life cost analysis. Our responsibilities also included analysis and paper work related to multiple utility rebate programs, and grants from multiple sources including the MADOER Alternative Energy Certificates (AEC's) and a large HUD ARRA public housing capital fund amongst others.	Cambridge Housing Authority 675 Massachusetts Avenue Cambridge, MA 02139 Tina Miller, Consultant to CHA, Principal, in Charge, LLC 617- 520-6344 Tise Design Associates, Architect 246 Walnut Street, Suite 303 Newtonville, MA 02460 Steve Tise, Principal (617)-581-6601	2013	\$28,000	\$550
(2) Cambridge Housing Authority, Major Renovations Newtowne Court, Sergio Siani, LEED AP Matthew Bean, PE, LEED AP	Project included M&P & FP design & construction services for renovations to 8 buildings with a total of 268 family dwelling units. This project included installation of two new central boiler plants including gas fired cogeneration systems and heating system replacement at each dwelling unit. The project also included kitchen and bath renovations to each dwelling unit. Sergio Siani, LEED AP	Cambridge Housing Authority 362 Green Street Cambridge, MA 02139 Baker/ Wohl Architects 132 Lincoln Street #4 Boston, MA 02111 617-350-7420	2017	\$43,000	\$654

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Sub-Consultant Name: Norian/Siani Engineering, Inc.					
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(3) ParkView Apartments, Affordable Housing, New Construction Newton, MA Sergio Siani	Project involved new construction of six residential duplex style buildings. These energy efficient buildings were designed conforming to the MA State Building Code, Stretch Code and achieved LEED for Homes and EnergyStar certifications. Norian/Siani Engineering provided complete HVAC, plumbing, fire protection and electrical design for two buildings out of a total of six buildings in this development. The two buildings would establish the prototype for a design-build effort by the contractor for completion of the remaining four buildings.	Winslow Architects, Incorporated 89 Massachusetts Avenue Arlington, MA 02474 John Winslow, Architect 781- 648-6600 x 201	2011	\$2,800	\$20
(4) DHCD House Doctor, Various Locations, MA Boiler & DHW System Replacements Sergio Siani, LEED AP Matthew Bean, PE, LEED AP George A. Comatas, PE	Under the "House Doctor" program, with the Massachusetts Dept. of Housing & Community Development we have undertaken a number of separate study, design and construction projects that replace existing inefficient heating plants with new efficient systems. Often these projects include replacement of various additional mechanical systems within the buildings, (thermostats, valves, etc). Many of the projects are funded in part using ARRA funds. Acton HA – Various properties & buildings (16 Boiler plants) Brookline HA – Various properties & bldgs. (13 Boiler plants) Concord HA – Various properties & buildings (15 Boiler plants) Sudbury HA – Various properties & buildings (8 Heating plants) Wakefield – Various properties & buildings (9 Boiler plants)	DHCD 100 Cambridge Street, Suite 300 Boston, MA 02114 John Donoghue P. E., Engineer (617) 573-1158	2011 2011 2011 2011 2012-	\$178 \$425 \$113 \$57 \$247	\$27 \$48 \$15 \$14 \$31

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Sub-Consultant Name: Norian/Siani Engineering, Inc.					
a. Project name & location Principal-in-Charge	b. Brief description and responsibility (include reference to areas of experience listed in RFS)	c. Project Owner's name & address and owner's reference name & phone number	d. Completion Date (actual or estimated)	e. Project (Construction) Cost (000's)	Fee for work for which firm was responsible
(5) Newton HA, New Hyde School Apartments, Heating System Upgrades Newton, MA Sergio Siani, LEED AP Matthew Bean, PE, LEED AP George A. Comatas, PE	MEP Design & Construction Phase services for this former school building that was renovated circa 1984 into a 13- dwelling unit handicapped living facility, which also contains the offices of the Housing Authority, was conditioned by air source heat pumps and included individual direct-fired gas domestic water heaters for each dwelling unit. Our work included a study of HVAC and DHW options to be considered for replacement of the existing equipment. High efficiency air source heat pumps were selected to provide space heat and comfort cooling. The domestic hot water system included the installation of a centralized domestic hot water plant featuring high efficiency condensing gas fired water heaters.	Newton Housing Authority 82 Lincoln Street Newton Highlands, MA 02461 David Battat, Capital Improvement Coordinator (617) 552-5501	2015	\$400	\$45

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Sub-Consultant Name: DM Berg

a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1) 300 Cambridge Street Boston, MA Ali R. Borojerdi, P.E., LEED AP	Six-story steel framed building Mixed use	The Architectural Team 50 Commandant's Way Chelsea, MA Michael Liu, 617-889-4402	2014	10,000	40
(2) The Watch Factory Renovation Waltham, MA Ali R. Borojerdi, P.E., LEED AP	Renovation of existing mill building to residential	Bruner Cott Associates 130 Prospect Street Cambridge, MA Henry Moss, 617-492-8400	2014	110,000	250
(3) Unity Place Lowell, MA Ali R. Borojerdi, P.E., LEED AP	Four-story wood framed residential building	Winslow Architects 89 Massachusetts Avenue Arlington, MA John Winslow, 781-648-6600	2011	4,000	16
(4) The Residence at Easton Easton, MA Ali R. Borojerdi, P.E., LEED AP	Three-story steel framed senior living	The Architectural Team 50 Commandant's Way Chelsea, MA Michael Liu, 617-889-4402	2015	9,000	40
(5) 11 West Broadway Boston, MA Thomas G. Heger, P.E. LEED AP	Ten-story steel framed residential building	Bodwell Pines 220 North Main St. Natick, MA 01760 Ron Simon, 617-875-7777	2013	24,000	120

(6) Lawrence Mills Lowell, Massachusetts Ali R. Borojerdi, P.E., LEED AP	Structural design for the conversion of the existing industrial mills into housing..	EA Fish Associates, Inc. The Architectural Team 50 Commandant's Way at Admiral's Hill Chelsea, MA 02150 (617) 889-4402 Mr. Mike Binette	2005	20,000	112
(7) Atlas Lofts Chelsea, Massachusetts Ali R. Borojerdi, P.E., LEED AP	Renovation of an existing 3-story building plus basement with a total area of about 72,000 sq.ft.	Mitchell Properties The Architectural Team 50 Commandant's Way at Admiral's Hill Chelsea, MA 02150 (617) 889-4402 Mr. Mike Binette	2011	7,000	35

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Sub-Consultant Name: **HAMMER+WALSH DESIGN INC.**




a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1) Cambridge City Hall Annex 344 Broadway Cambridge, MA 02139 Nelson Hammer, PIC	Comprehensive landscape architectural services (design and construction administration) for a publicly funded municipal building	Richard C. Rossi, Deputy City Manager City of Cambridge 795 Massachusetts Avenue Cambridge, MA 02139 617-349-4300	2004	\$8,000	\$11.5
(2) JFK Apartments (Cambridge Housing Authority) 55 Essex Street Cambridge, MA 02139	Comprehensive landscape architectural services (design and construction administration) for an 8- story, elderly affordable housing building	Jennifer Faigel Cambridge Housing Authority 362 Green Street 617-864-3020	2004	\$6,000	\$7.0
(3) Waldo Court Housing (Wellesley Housing Authority) 50 Linden Street Wellesley, MA 02481 Nelson Hammer, PIC	Comprehensive landscape architectural services (design and construction administration) for the renovation of a publicly funded building (affordable housing)	Pamela Clark Allen, Director Wellesley Housing Authority 109 Barton Road Wellesley, MA 02481 781-235-0223	2011	\$2,250	\$5.5
(4) Putnam Gardens Apartments (Cambridge Housing Authority) 64 Magee Street Cambridge, MA 02139	Community garden design (including walkways, garden construction, and perimeter fencing), and bike rack design. Includes construction admin.	Amy Winter Planning Administrator Cambridge Housing Authority 362 Green Street Cambridge, MA 02139 617-864-3020	2018	\$20,500	\$12.5
(5) Frank J. Manning Apartments (Cambridge Housing Authority) 237 Franklin Street Cambridge, MA 02139	Comprehensive landscape architectural services (design and construction administration) for the renovation of elderly/disabled public housing project)	Amy Winter Planning Administrator Cambridge Housing Authority 362 Green Street Cambridge, MA 02139 617-864-3020	2018	\$48,500	\$32.5



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Sub-Consultant Name: AKF Group					
a. Project name & location Principal-in-Charge	b. Brief description and responsibility (include reference to areas of experience listed in RFS)	c. Project Owner's name & address and owner's reference name & phone number	d. Completion Date (actual or estimated)	e. Project (Construction) Cost (000's) Construction Costs (actual, or estimated if not completed)	Fee for work for which firm was responsible
(1) Massachusetts Institute of Technology, Cambridge, MA Principal in Charge: Jay lerardi, Ph D, PE, Partner	MIT hired AKF Code Consulting to identify code deficiencies and the threshold triggers that would require corrective action such as upgrading to current standards. AKF performed existing building code compliance evaluations for eight (8) academic and graduate student housing buildings on the MIT campus, which included over 1,128,000 GSF.	MIT Department of Facilities 77 Massachusetts Avenue Building NE49-2100 Cambridge, MA 02139-4307 Sean Sweeney Program Manager, Capital Renewal (617) 324-6176	Aug 2014	N/A	\$11
(2) Phillips Exeter Academy Wheewright Hall Exeter, NH Partner- In- Charge: James lerardi, PE	AKF provided code consulting services for renovations to three faculty apartments, student bathrooms, and eight student units. In addition, the existing sprinkler system will be altered per the new floor layout and fire alarm devices will be relocated per the new floor layout and applicable codes. Current Phase: Completed	Cutler Associates 43 Harvard Street Worcester, MA 01609 Michael Bass, 508-757-7500	7/29/2015	\$780	\$5.1
(3) Cambridge Housing Authority House Dr Cambridge, MA 02139 Principal in Charge Jay lerardi, PhD, PE, Partner	AKF provided code consulting services for House Doctor at Corcoran Park Development.	Next Phase Studios 344 Boylston St Boston, MA 02116 Rick Ames, AIA (617) 375-9300	2016	\$300	\$64
(4) Amesbury Department of Public Works Amesbury, MA Principal in Charge: Jay lerardi, PhD, PE, Partner	The project includes interior renovations to an existing 14,000 sf building that will be attached to a new 12,000 sf pre-engineered building via a connector. The proposed programming includes storage and administrative space. A future wash station building is being considered in the project.	Urban Meritage, LLC 288 Newbury Street, Suite 201 Boston, MA 02115	2011	\$10,000	n/a
(5) Northeastern University - Boston, MA Principal in Charge: George Mackenzie, LEED AP, Partner	AKF has provided code consulting for several projects at Northeastern University including the Fenway Center, 15,000 SF, Mugar Hall 20,000 SF, Forsyth Hall 10,000 SF, and the Digital Media Commons 2,000 SF.	Northeastern University 288 St. Botolph Street Boston, MA 02115 John Sheldon (617) 373-5082	July 2012	N/A	Fee ranges from \$1-5







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Sub-Consultant Name: A. M. Fogarty & Associates, Inc.						
a. Project name & location Principal-in-Charge	b. Brief description and responsibility (include reference to areas of experience listed in RFS)	c. Project Owner's name & address and owner's reference name & phone number	d. Completion Date (actual or estimated)	e. Project (Construction) Cost (000's)	Fee for work for which firm was responsible	
(1) Pearl Harbor Housing Framingham Housing Authority Framingham, MA Peter Timothy	Cost Estimating Modernization and Addition	City of Framingham Framingham Housing Authority One John J. Brady Drive Framingham, MA 01702 508 879-7562	2009	\$24.0 mil	\$27	
(2) Eastview Terrace Development New Haven, CT Peter Timothy	Cost Estimating Renovation & New Construction	City of New Haven New Haven Housing Authority 360 Orange Street #1 New Haven, CT 06511 203 498-8800	2007	\$32.1 mil	\$17.5	
(3) High Rock Homes Needham, MA Peter Timothy	Cost Estimating New Construction	Town of Needham Needham Housing Authority 214 Linden Street Needham, MA 02492 781 444-0936	2007	\$8.6 mil	\$7.2	
(4) Quinpiac Terrace New Haven, CT Peter Timothy	Cost Estimating Renovation and Addition	City of New Haven New Haven Housing Authority 360 Orange Street #1 New Haven, CT 06511 203 498-8800	2006	\$24.6 mil	\$15	
(5) West Broadway Redevelopment Boston, MA Peter Timothy	Cost Estimating New Construction	City of Boston Boston Housing Authority Boston, MA 617 988-4000	2003	\$22.0 mil	\$11.1	



9. List All Projects Within The Past 5 Years For Which Prime Applicant Has Performed, Or Has Entered Into A Contract To Perform, Any Design Services For All Public Agencies Within The Commonwealth.						
# of Total Projects:		# of Active Projects:		Total Construction Cost (In Thousands) of Active Projects (excluding studies):		
Role P, C, JV *	Phases St., Sch., D.D., C.D., A.C.*	Project Name, Location and Principal-In-Charge		Awarding Authority (Include Contact Name and Phone Number)	Construction Costs (In Thousands) (Actual, Or Estimated If Not	Completion Date (Actual or Estimated) (R)Renovation or (N)New
P	Complete	1. FRANCIS STREET – N. Andover, MA John Winslow, RA – Principal In Charge 		NORTH ANDOVER HOUSING AUTHORITY Cathy Hoog – Exec. Director 310 Greene St. North Andover, MA Tel. 978-682-3932	500	2016
		SIDING & BULKHEAD REPLACEMENT				
P	Complete	2. SALT SEA LANE – Falmouth, MA John Winslow, RA – Principal In Charge 		FALMOUTH HOUSING AUTHORITY Bob Arsenault 15 Scranton Street Falmouth, MA Tel: 508-566-5622	150	2015
		RE-ROOFING				



P	Complete	<p>3. LIST HOUSE - Wellesley, MA John Winslow, RA - Principal In Charge</p>  <p>SIDING REPLACEMENT</p>	<p>NEEDHAM/WELLESLEY HOUSING AUTH. Gary Kuphal 109 Barton Road Wellesley, MA 02481 Tel: 781-444-3011</p>	300	2016
P	Complete	<p>4. ATLANTIC HOUSE COURT - Hull, MA John Winslow, RA - Principal In Charge</p>  <p>WINDOWS/SIDING REPLACEMENT</p>	<p>HULL HOUSING AUTHORITY Michael Flaherty 6 Atlantic House Court Hull, MA 02045 Tel: 781-760-1131</p>	150	2015
P	Complete	<p>5. LINDEN STREET - Needham, MA John Winslow, RA - Principal In Charge</p>  <p>RE-ROOFING</p>	<p>NEEDHAM/WELLESLEY HOUSING AUTH. Gary Kuphal 28 Robert Cooke Drive Needham, MA Tel: 781-444-3011</p>	163	2015




P	Complete.	<p>6. NAHANTAN VILLAGE – Norwood, MA John Winslow, RA – Principal In Charge</p>  <p>STAIRWELL VCT REPLACEMENT</p>	<p>NORWOOD HOUSING AUTH. Mr. William Plasko William Shyne Circle #1 Norwood, MA 02062 Tel: 781-762-8115</p>	95	2016
P	Complete	<p>7. LEVITT TERRACE – Abington, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>ABINGTON HOUSING AUTH. Patricia Murphy – Exec. Director 100 Lincoln Blvd. Abington, MA Tel: 781-789-8539</p>	90	2015

P	Complete	<p>8. SUNSET TOWERS – Leominster, MA John Winslow, RA – Principal In Charge</p>  <p>ACCESSIBLE UNIT RENOVATION</p>	<p>LEOMINSTER HOUSING AUTHORITY</p> <p>Mr. Peter Proulx – Exec. Director Leominster Housing Authority 100 Main Street Leominster, MA 01453 Tel. 978-537-2861</p>	100	2016
P	Complete	<p>9. MAPLE GARDENS – Fall River, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>FALL RIVER HOUSING AUTHORITY</p> <p>Kevin Sbardella 472 Aetna Street Fall River, MA Tel: 508-675-3584</p>	150	2015

P	Sch.	<p>10. MARY MURPHY APARTMENTS Winchester, MA John Winslow, RA – Principal In Charge</p>  <p>SLIDING DOOR REPLACEMENT</p>	<p>WINCHESTER HOUSING AUTHORITY Jack Hurd – Exec. Director 13 Westley Street Winchester, MA 01890 Tel. 781-721-5718</p>	135	2017
P	Sch.	<p>11. SCHOOL STREET/WEST PARK – Natick, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>NATICK HOUSING AUTHORITY Eileen Merritt – Exec. Director 4 Cottage Street Natick, MA 01760 Tel. 508 - 653-2971</p>	135	2017

P	AC	<p>12. CORBETT APARTMENTS – Somerville, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>SOMERVILLE HOUSING AUTHORITY Brian Langton 30 Memorial Road Somerville, MA 02145 Tel. 617-625-1152 x 331</p>	150	2017
P	Complete	<p>13. CENTRE STREET VILLAGE – Dennis, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>DENNIS HOUSING AUTHORITY Nancy Friend – Exec. Director 167 Center St. South Dennis, MA Tel. 508-394-3120</p>	160	2016

P	DD	<p>14. O'BRIEN TOWERS, PAGNANO TOWERS, DROHAN APARTMENTS – Quincy, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>QUINCY HOUSING AUTHORITY Mr. Ric Mahoney 80 Clay Street Quincy, MA 02170 Tel. 647-847-4350</p>	1,000	2018
P	CD	<p>15. SCHOOL STREET/WEST PARK – Natick, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>NATICK HOUSING AUTHORITY Mr. Randy Waters 4 Cottage Street Natick, MA 01760 Tel. 508-653-2971</p>	200	2018

P	CD	<p>16. HERITAGE VILLAGE APARTMENTS – Northborough, MA John Winslow, RA – Principal In Charge</p>  <p>WINDOW REPLACEMENT</p>	<p>NORTHBOROUGH HOUSING AUTHORITY Ms. Lynne Moreno 26 Village Drive Northborough, MA 01532 Tel. 508-393-2408</p>	200	2018
P	AC	<p>17. MAPLE GARDENS – Fall River, MA John Winslow, RA – Principal In Charge</p>  <p>RE-ROOFING</p>	<p>FALL RIVER HOUSING AUTHORITY Mr. Kevin Sbardella 85 Morgan Street Fall River, MA 02721 Tel. 508-675-3584</p>	425	2017
P	AC	<p>18. BISHOP EID APARTMENTS – Fall River, MA John Winslow, RA – Principal In Charge</p>  <p>WINDOW REPLACEMENT</p>	<p>FALL RIVER HOUSING AUTHORITY Mr. Kevin Sbardella 85 Morgan Street Fall River, MA 02721 Tel. 508-675-3584</p>	300	2018

* P = Principal; C = Consultant; JV = Joint Venture; St. = Study; Sch. = Schematic; D.D. = Design Development; C.D. = Construction Documents; A.C. = Administration of Contract

10. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-Consultants For The Proposed Project. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED IN THE ADVERTISEMENT.**

WINSLOW ARCHITECTS INC. (WAI) and its AE Team are currently providing compete architectural and engineering services for two community centers in Framingham and Halifax as well designing new affordable housing developments in Yarmouth (40 units), Medfield (40 units) and Cambridge (16 units).

Winslow Architects was established in 1983 to provide complete architectural design and construction administration services for public and private developers of affordable housing and community facilities. WAI is also a "House Doctor" for the Cambridge Housing Authority and the State Dept. of Housing and Community Development. The firm specializes in building envelope renovation/modernization, interior renovation of buildings (including all MEP systems) and the design of new and renovated multifamily housing - primarily for affordable housing. Members of the Winslow AE Team provide specialized services for all work related Building Envelope repairs, MEP/FP, structural, Energy efficiency, Accessibility/code review, Civil, Landscape and Cost estimating.

11.	Professional Liability Insurance:		
	Name of Company	Aggregate Amount	Expiration Date
	XL SPECIALTY INSURANCE CO.	\$1,000,000	3-31-19
		Policy Number	
		DPS9912298	

12. Have monies been paid by you, or on your behalf, as a result of Professional Liability Claims (in any jurisdiction) occurring within the last 5 years and in excess of \$50,000 per incident? Answer YES or NO. If YES, please include the name(s) of the Project(s) and Client(s), and an explanation (attach separate sheet if necessary).

NO

13.	Name Of Sole Proprietor Or Names Of All Firm Partners and Officers:				
	Name	Title	MA Reg #	Status/Discipline	Status/Discipline
	a.				
	b.				
	c.				

14.	If Corporation, Provide Names Of All Members Of The Board Of Directors:				
	Name	Title	MA Reg #	Status/Discipline	Status/Discipline
	a. JOHN WINSLOW	PRESIDENT	6023	ARCHITECTURE	
	b.				
	c.				

15.	Names Of All Owners (Stocks Or Other Ownership):				
	Name And Title	% Ownership	MA Reg.#	Status/Discipline	Status/Discipline
	a. JOHN WINSLOW	100%	6023	ARCHITECTURE	
	b.				
	c.				

16. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. I further certify that this firm is a "Designer", as that term is defined in Chapter 7C, Section 44 of the General Laws, or that the services required are limited to construction management or the preparation of master plans, studies, surveys, soil tests, cost estimates or programs. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.

Submitted by (Signature)  Printed Name and Title **JOHN WINSLOW - PRESIDENT** Date **08-17-18**



WINSLOW ARCHITECTS INC. - QUALIFICATIONS

AUGUST 2018

WINSLOW ARCHITECTS was established in 1983 in Cambridge, MA as an architectural and site planning firm initially specializing in single and multifamily housing design and construction administration. Our work has expanded to include the following project types:

- **BUILDING RENOVATION/MODERNIZATION**
- **COMMUNITY SENIOR CENTERS**
- **MULTIFAMILY HOUSING**
- **CHAPTER 40B AFFORDABLE HOUSING**
- **CUSTOM SINGLE FAMILY HOUSING**

WINSLOW ARCHITECTS has worked with local not-for-profit developers and Public Housing Authorities in providing complete A/E services for the design and construction of both new and renovated affordable housing throughout Massachusetts in the past 35 years.

WINSLOW ARCHITECTS has been selected by DHCD as a "House Doctor" Architectural firm and by the Cambridge Housing Authority. In this capacity, we have worked over the past 3 years with Local Housing Authorities on 15+ projects involving building envelope modernization/renovations and interior renovations - including reroofing, doors/window, siding replacement, kitchen/bath replacements, etc.

WINSLOW ARCHITECTS is currently or has recently worked on the modernization and envelope repair of 145 units in Mashpee and of 224 units of tenant-occupied housing in Boston. We are currently renovating 92 units in Cambridge and restored an historic school building into 37 units of affordable housing. We are the Architect for the new construction of 40 units in Yarmouth, 36 units in Medfield, 16 units in Cambridge. The firm has completed numerous affordable housing developments under the Chapter 40B program – such as 51 units in Westford, 47 units in Chatham, 60 units of modular housing in Edgartown, 20 units in Needham..

WINSLOW ARCHITECTS has been selected to provide Architectural Peer Review services for 40B developments in Westford, MA as well as providing site planning consulting services.

WINSLOW ARCHITECTS continues to provide custom architectural design for custom single family houses, most recently in Cambridge and Aquinnah, MA.



WINSLOW ARCHITECTS INC. - REFERENCES 2018

SENIOR/COMMUNITY CENTERS

PELHAM COMMUNITY CENTER

Mr. Tim McHale – OPM
McHale & Company
t. 617-787-2122 e. McHaleCompany@aol.com

Mr. Robert Engler – Pelham Chair
SEB LLC
t. 617-782-2300 e. Bob Engler

HALIFAX SENIOR CENTER

Mr. John Campbell
Halifax Municipal Building Committee
t. 781-589-4736 e. e.prephardingprt@aol.com

MULTIFAMILY - NEW CONSTRUCTION

50 YORK STREET

Robert MacArthur
Just-A-Start Corporation – Cambridge, MA
t. 617-494-0444 x 321/e. robertmacarthur@justastart.org

MEDFIELD GREEN GROVEDALE HOMES

John Kelly – President
Medfield Meadows LLC
t. 619-794-4889/ e. johnpkelly86@gmail.com

YARMOUTH GARDENS

Jim Perrine – President
Commonwealth Community Developers
t. 617-894-2512 e. jjperrine@verizon.net

PARKVIEW HOMES – NEWTON

Bob & Geoff Engler – President



MULTIFAMILY - RENOVATION/MODERNIZATION

BISHOP ALLEN APARTMENTS

Robert MacArthur

Just-A-Start Corporation – Cambridge, MA

t. 617-494-0444 x 321/e. robertmacarthur@justastart.org

MASHPEE VILLAGE

Jim Perrine (Former Senior Project Manager)

The Community Builders, Inc – Boston, MA

t. 617-894-2512 e. jperrine@verizon.net

CHARLESBANK HOME

Mr. Jason Tucker

Maloney Properties – Boston, MA

t. 617-209-5402 e. Jason Tucker

jtucker@maloneyproperties.com

PUBLIC HOUSING AUTHORITIES

FALMOUTH

Bob Arsenault

Falmouth Housing Authority

t. 508-566-5622

e. BArsenault@falmouthhousing.org

SOMERVILLE

Mr. Brian Langton

Somerville Housing Authority

t. 617-625-1152

e. brianl@sha-web.org

CAMBRIDGE

Devin Chausse

Cambridge Housing Authority

t. 617-401-4308

e. dchausse@cambridge-housing.org

N. ANDOVER

Cathy Hoog

N. Andover Housing Authority

t. 978-682-3932 e. c.choog@northandoverha.com

GREENDALE VILLAGE – NEEDHAM

SEB Development Corp.- Brighton

t. 617-782-2300 x 201/e. rengler@s-e-b.com/



WINSLOW ARCHITECTS INC - CURRENT/RECENT PROJECTS
August, 2018

NEW CONSTRUCTION

MEDFIELD GREEN Medfield, MA	36 Units – 40B Rental Housing	\$ 14,000,000
50 YORK STREET Cambridge, MA	16 Units Rental Housing	\$ 7,500,000
YARMOUTH GARDENS Yarmouth, MA	40 Units Rental Housing	\$ 10,000,000
STONYBROOK Westford, MA	51 Units Rental Housing	\$ 7,500,000
PELHAM Framingham, MA	Educational Community Center	\$ 2,500,000
HALIFAX Halifax, MA	Senior Center	\$ 900,000

BUILDING ENVELOPE RENOVATION/MODERNIZATION

SOMERVILLE HOUSING AUTH.	Roofing Replacement	\$ 150,000
FALL RIVER HOUSING AUTH.	Window and roofing	\$ 250,000
FALMOUTH HOUSING AUTH.	Window & Roofing	\$ 200,000
N. ANDOVER HOUSING AUTH.	Siding Replacement.	\$ 450,000
NATICK HOUSING AUTH.	Roofing Replacement	\$ 250,000
WINCHESTER HOUSING AUTH.	Window Replacement	\$ 150,000



John A. Winslow, AIA

**PROFESSIONAL
EXPERIENCE**

1983-
Present

**WINSLOW ARCHITECTS, INCORPORATED
Arlington, MA**

Founding owner and principal of architectural firm specializing in site planning and housing design – with a particular focus on affordable community based multi-family housing, building renovations and custom single family housing.

1980-82

**STEFFIAN-BRADLEY ASSOCIATES, ARCHITECTS
Boston, MA**

Job Captain with large multi-faceted architectural firm involved with residential, commercial and medical facility design.

1976-80

**FRIENDS COMMUNITY DEVELOPMENT CORP.
Easton, MA**

Project Director for non-profit development corporation developing a 160-unit solar-heated retirement community.

EDUCATION

1976-80

**MASSACHUSETTS INSTITUTE OF TECHNOLOGY
Cambridge, MA
Master of Architecture - 1980**

1965-69

**TUFTS UNIVERSITY
Medford, MA
Bachelor of Arts - 1969, Cum Laude**

**REGISTRATION/
AFFILIATIONS**

1985

MASSACHUSETTS #6023

President – Cambridge Community Chorus
Former Chairman - Newton Design Review Committee
Former President – NewTV Newton Cable Access TV
Former President - Newton Historical Society



Christopher Kicza, AIA, LEED AP

PROFESSIONAL EXPERIENCE

2017-
Present

**WINSLOW ARCHITECTS, INCORPORATED
Arlington, MA**

SENIOR PROJECT ARCHITECT.

Architectural firm specializing in site planning and housing design – with a particular focus on affordable community based multi-family housing, building renovations and custom single-family housing.

2007-17

**STEFFIAN-BRADLEY ASSOCIATES, ARCHITECTS
Boston, MA**

Project Architect for a variety of healthcare and retirement community residential projects.

1999-2007

**BAKER-WOHL ARCHITECTS
Boston, MA**

Project architect for various project types including institutional, commercial, single family and multi-family residential projects

1997-99

**BEACON ARCHITECTURAL ASSOCIATES
Boston, MA**

Job Captain for Boston University interiors projects from design through construction administration.

EDUCATION

1988-93

**RHODE ISLAND SCHOOL OF DESIGN
Providence, RI**

Bachelor of Fine Arts and Bachelor of Architecture - 1993

REGISTRATION/ AFFILIATIONS

1985

MASSACHUSETTS #10589

2005

LEED AP

2016

PHIUS Certified Passive House US Consultant



PHIL REVILLE

PROFESSIONAL EXPERIENCE

2015 -
Present

WINSLOW ARCHITECTS, INCORPORATED Arlington, MA

Project Manager with architectural and site planning firm specializing in multifamily housing and commercial/institutional architecture and construction administration. CAD production of construction documents and construction administration.

2014-
2015

BLG+ Somerville, MA

Research assistant with start-up architecture and design firm providing urban planning and land use services.

2012-
2014

LILKER ASSOCIATES New York, NY

AutoCAD production of construction documentation for medium-size MEP technology firm specializing in industrial and commercial interiors.

EDUCATION

2008 - 12

QUEENS UNIVERSITY Kingston, ON

BA w/ honors – Geography

2014 -

BOSTON ARCHITECTURAL COLLEGE Boston, MA

Master of Architecture

AFFILIATIONS/AWARDS

BAC Steffian Bradley Award
BAC Alumni Association Award
BAC Portfolio Award
AIA Student Member
APA American Planning Association Member



50 YORK APARTMENTS

Cambridge, MA | 2018

16 units of affordable rental housing in a 3 story elevator building with parking garage under – designed as a single building with a triple decker faced to reflect the character of the surrounding neighborhood.

Construction cost: \$6,500,000

Developer	Just-A-Start Corp.
Contractor	NEI Construction Corp
Architect	Winslow Architects
Civil	Lenard Engineering
Structural	DM Berg
MEP FP	Norian Siani Engineering
Landscape	Hammer + Walsh Design





MEDFIELD GREEN

Medfield, MA | 2018

36 units of affordable rental and sales housing on 3 acres – designed in a combination of townhouse, garden apartment and cottage style duplexes.

Construction cost: \$7,500,000

Developer Medfield Green LLC.
Contractor Corrigan Construction
Architect Winslow Architects





YARMOUTH APARTMENTS

Lowell, MA | 2019

40 units of affordable rental housing in 2 low rise buildings on 3 acres – designed to reflect the typical New England and Cape Cod architecture of the surrounding area.

Construction cost: \$10,000,000

Developer: Commonwealth Community Developers
 Contractor: Delphi Construction
 Architect: Winslow Architects
 Civil: Coastal Engineering
 Structural: Coastal Engineering
 MEP | FP: Wozny Barbar
 Landscape: Hammer + Walsh Design





UNITY PLACE

Lowell, MA | 2011

23 units of affordable rental housing in a midrise elevator building – designed to reflect the triple decker nature of the surrounding neighborhood.

Construction cost: \$5,000,000

Developer	Coalition For A Better Acre
Contractor	Curtis Construction
Architect	Winslow Architects
Civil	Hancock Associates
Structural	DM Berg
MEP FP	MacRitchie Engineering





STONYBROOK APARTMENTS

Westford, MA | 2008 + 2016

51 units of affordable rental housing on 7 acres in townhouse and garden apartment style – designed to reflect the residential and semi-rural nature of the surrounding community.

Construction cost: \$12,000,000

Developer	Common Ground Development
Contractor	NEI Construction Corp
Architect	Winslow Architects
Civil	Westcott Site Services
Structural	Waterman Engineering
MEP FP	MacRitchie Engineering
Landscape	Hammer + Walsh Design



PARKVIEW HOMES

Newton, MA | 2011

10 units for sale on 1.5 acres built under the chapter 40B program – designed as duplexes in a typical New England single family home style.

Construction cost: \$3,500,000

Developer	SEB, LLC
Contractor	Landmark Construction
Architect	Winslow Architects
Civil	Westcott Site Services
MEP FP	Norian Siani Engineering
Landscape	Hammer + Walsh Design





GREENDALE VILLAGE

Lowell, MA | 2017

20 townhomes on 5 acres built under the chapter 40B program – designed with master bedrooms on first floor in typical New England residential style.

Construction cost: \$5,000,000

Developer
Contractor
Architect

SEB, LLC
Whitman Homes
Winslow Architects



MORGAN WOODS

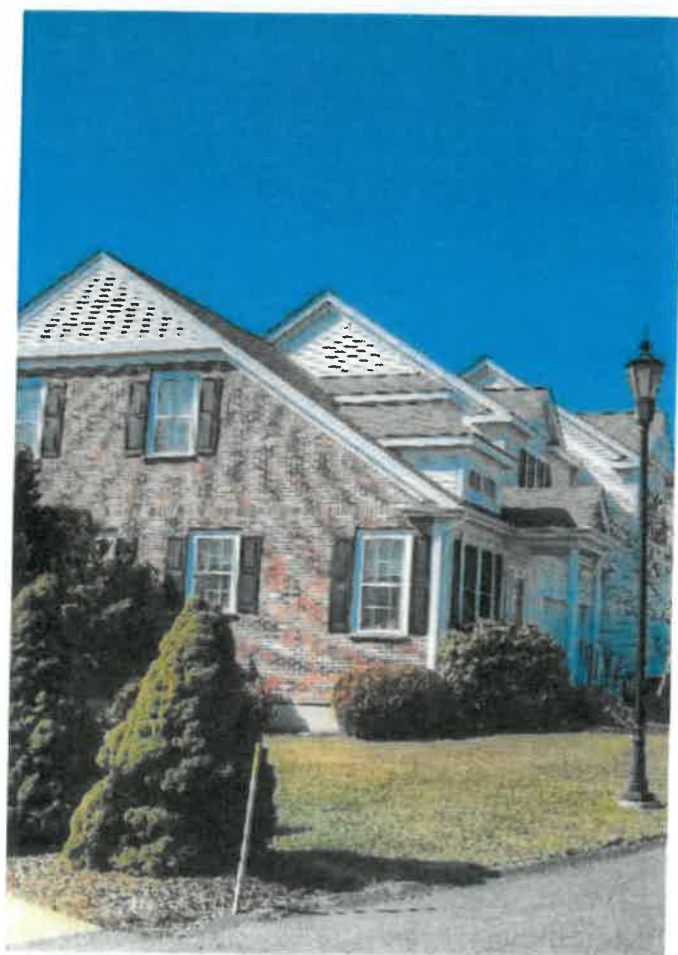
Edgartown, MA | 2007

60 units of affordable rental housing on 12 acres – designed to reflect typical Cape Cod and rural New England architecture and built with modular construction.

Construction cost: \$7,500,000

Developer The Community Builders
 Contractor Williams Construction
 Architect Winslow Architects
 Modular Keiser Modular
 Landscape Horiuchi + Solien





BEACON WOODS

Burlington, MA | 2005

24 condominium townhomes on 5 acre parcel adjacent to rte. 95 - designed for 55+ residents with 2 car garage and master bedroom suites on the first floor.

Construction cost: \$5,000,000

Developer	Vazza Properties
Contractor	Vazza Construction
Architect	Winslow Architects
Civil	Marchionda Engineering



LELAND FARMES

Sherborne, MA | 1995

15 units of affordable housing on 7 acres in a rural suburban community. Using the traditional single family "farmstead", this design consists of 4 units in the "main house", 1 unit in the "shed" and 3 units in the "barn" to address the low-density homes in the surrounding area.

Construction cost: \$5,000,000

Developer Sherborne Affordable
Housing Corp.
SEB, LLC.

Architect Winslow Architects





LAKE STREET TERRACE

Chatham, MA | 2006

disguise multifamily housing in a single family neighborhood - combining 2 to 4 units within a large single family structure and using typical Cape Cod materials such as cedar clapboards, shingles, trim and gables.

Construction cost: \$10,000,000

Developer The Community Builders
Contractor Williams Construction Co.
Architect Winslow Architects

HANCOCK ASSOCIATES

Land Surveying

Civil Engineering

Wetland Science

Landscape Architecture

Geotechnical Engineering

185 Centre Street
Danvers, MA 01923
Phone: 978-777-3050
Fax: 978-774-7816

315 Elm Street
Marlborough, MA 01752
Phone: 508-460-1111
Fax: 508-460-1121

4 Freetown Street
Lakeville, MA 02347
Phone: 508-923-1002
Fax: 508-923-0022

403 Main St., Unit 106
Salem, NH 03079
Phone: 603-898-3491
Fax: 603-898-6263

www.hancockassociates.com

HANCOCK ASSOCIATES

COMPANY PROFILE

Principals:	Wayne C. Jalbert, P.L.S.	Scott R. Jalbert, P.L.S.
	Joseph M. Small, P.L.S.	Andrew Desmond
	Carlos M. Frias, P.L.S.	.
Professional Staff:	(7) Registered Professional Engineers, MA, & NH	
	(10) Registered Professional Land Surveyors, CT, MA, RI & NH	
	(2) Wetland Scientists / Ecologists	
Additional Staff Licensure/ Certification	Title V Inspection	
	Certified MA Soil Evaluation	
	OSHA 10 hour Construction Training	
	OSHA 40 hour Hazardous Waste Operations	
	Emergency Response Training (HAZWOPER)	
	MBTA Contractor Safety Training	
Offices:	AMTRACK Contractor Safety Training	
	185 Centre Street, Danvers, MA 01923	
	(978) 777-3050 / (978) 774-7816 (fax)	
	info@HancockAssociates.com	
	315 Elm Street, Marlborough, MA 01752	
	(508) 460-1111 / (508) 460-1121 (fax)	
	206 Worcester Rd, Princeton, MA 01541	
	(978) 464-5890	
	34 Chelmsford Street, Chelmsford, MA 01824	
	(978) 244-0110 / (978) 244-1133 (fax)	
	206 Worcester Road, Princeton, MA 01541	
	(978) 464-5890 / (978) 464-5383 (fax)	
	25 Bridge Street, Billerica, MA 01821	
	(978) 667-9736 / (978) 671-9565 (fax)	
Website:	www.HancockAssociates.com	
Year of Establishment:	1978	
Number of Employees:	45+	

COMPANY OVERVIEW

Hancock Associates has been recognized in Eastern Massachusetts as a leader in the land development industry since 1978. During this 40 year period, we have expanded our professional offerings and service region. Currently with five offices: Danvers, Marlborough, Princeton, Chelmsford, Billerica and Amesbury, MA, our territory now includes Central and Eastern Massachusetts, and Southern New Hampshire, Rhode Island and Eastern Connecticut.

Hancock's professional staff includes land surveyors, civil engineers, and wetland scientists. We are licensed in various states, including Connecticut, Massachusetts, New Hampshire and Rhode Island. We also offer specialized credentials, including OSHA Hazardous Waste Operations and Emergency Response Training, and MBTA and AMTRAK Contractor Safety Training.

Our staff has contributed their skills to a myriad of project types: residential, commercial and retail development; hospitals, assisted-care facilities and medical buildings; school and university improvements; and Superfund, hazardous waste and landfill sites.

Our clients include:

- Architects
- Bankers
- Developers
- Engineers
- Landowners
- Lawyers
- Municipalities
- Realtors
- State and Federal Agencies
- Utility Companies

Extensive experience coupled with a dedication to on-going training and pursuit of current technological advances in equipment, computers and software is the foundation upon which the company has built project success in land development and infrastructure design.

DIVISION OVERVIEW

Hancock Associates features 3 unique service divisions, each represented by licensed professionals: Land Surveying, Civil Engineering, Geotechnical Engineering and Wetland Science.

Land Surveying

The land surveying staff at Hancock provides a wide range of services from cadastral, topographic and ALTA/NSPS title insurance surveys to construction layout and G.P.S. We employ field crews fully equipped with state-of-the-art equipment and communications gear. Utilizing these total stations and electronic data collectors, fieldwork is downloaded and processed through AutoCAD based software and is efficiently calculated and plotted, producing a variety of digital and/or hardcopy formats. Our GPS

capabilities include photo and control surveys and mapping surveys of wetlands, test pits, manholes, utility structures and other site features for projects in the New England area.

Civil Engineering

Hancock's engineers are experienced in all facets of engineering design required to obtain permits for residential and commercial developments including land planning and project representation. We are skilled in the design of roadways, minor highways, site grading, water distribution networks, sewer collection systems with or without pumping stations and storm water management facilities including hydrologic/hydraulic analyses.

Drawing upon our design expertise, Hancock also provides peer review submittals for municipal boards and commissions and provides expert witness testimony. Throughout its years in business Hancock has garnered respect among boards and commissions for its thorough and straightforward style, providing the firm with the credibility that expedites approval processes.

Wetland Science

Hancock's staff of wetland scientists are experts in wetland delineation, soil evaluations, wetland functional assessment, construction design, regulatory permitting and applicant representation. We are particularly experienced at planning and implementing large scale wetland delineations; rare plant, animal, or sensitive ecological community surveys; developing and implementing permitting strategy; and project representation. Our project approach stresses early communication with public and private agencies in order to focus efforts on issues that are of particular concern to regulatory authorities. Additionally, our professionals continuously monitor the ever-changing federal, state and local environmental regulations and policies that impact both inland and coastal projects.

Proper planning and design lead to successful permit acquisition, even for some of the most challenging sites. Hancock's Wetland Science staff enjoys a record of success obtaining regulatory approvals for projects ranging from large commercial projects to small residential construction. We also have extensive experience with permitting for coastal projects, including marinas, seawall construction and repair, and construction work within and adjacent to coastal zone resource areas.

SUMMARY

Hancock's in-house project coordination of its three divisions maximizes project efficiency. Professional experience combined with knowledge of the regulatory environment and dedication to client goals produce quality land use services at reasonable costs.

DIVISION DETAILS

LAND SURVEYING DIVISION

The land surveying staff at Hancock provides a wide range of services from cadastral, topographic and ALTA/NSPS land title insurance surveys to construction layout and GPS. We employ field crews fully equipped with state-of-the-art equipment and communications gear. Utilizing these total stations and electronic data collectors, digital levels, dual frequency RTK, GPS and reflector-less instruments, field work is downloaded and processed through AutoCAD based software and is efficiently calculated and plotted, producing a variety of digital and/or hardcopy formats. Our GPS capabilities include photo, control, surveys and mapping surveys of wetlands, test pits, manholes, utility structures and other site features for projects in the New England area.

Our large staff of Professional Land Surveyors (P.L.S.) and support surveyors ensure proper project oversight, QA/QC, and efficient communication and strategy. Hancock's surveying professionals are licensed in Connecticut, Massachusetts and New Hampshire, and offer specialized credentials including OSHA Hazardous Waste Operations and Emergency Response Training and AMTRAK Contractor Safety Training. Our extensive experience coupled with our dedication to on-going training and pursuit of current technological advances in equipment, computers and software is the foundation upon which we have built project teams successful in roadway, rail and infrastructure design; hospital, assisted-care facilities and medical building construction; residential, commercial and retail development; school and university improvement; and Superfund, hazardous waste and landfill sites.

Hancock Survey Associates, Inc., is a full service engineering, land surveying firm that has served clients for over 30 years. The unique relationship between our Wetland Science, survey and engineering divisions allows Hancock to provide comprehensive land use assistance with consistently professional results. Our in-house project coordination capabilities minimize overhead expenses, while maximizing project efficiency. Professional experience, combined with knowledge of the regulatory environment and dedication to client goals, produces quality land use services at competitive cost.

LAND SURVEYING SERVICES

Our land surveying staff is professionally qualified to provide the following services:

- Boundary
- Topographic
- Subdivision of Property
- G.P.S.
- Land Planning
- Wetland
- Existing Conditions
- Construction Layout
- ALTA/ACSM Title Insurance
- Aerial Photogrammetric Control
- Land Court
- Volume Calculations
- Utility Mapping
- G.P.S. Mapping
- Condominium Site Plans
- Lot Staking
- Plot Plans
- Hydrographic
- Settlement Monitoring
- Expert Testimony

Specialized Projects:

- Roadways / Railroads / Bike Paths
 - Residential / Commercial / Retail Developments
 - Office and Industrial Park Developments
 - Shopping Centers / Superstores
 - Medical Buildings and Hospital Construction
 - Assisted Living Care Facilities
 - School and University Improvements
 - Athletic Fields and Facilities Improvements
 - Power lines / Transmission Lines
 - Utility Right of Ways
 - Tank Farms / Gas Stations
 - Infrastructure Design
 - Country Clubs / Yacht Clubs / Marinas
 - Churches / Libraries
 - Landfills / Quarries / Superfund Sites
-

CIVIL ENGINEERING DIVISION

The Engineering Division at Hancock Associates provides a broad range of design services to a variety of clients, including state agencies, developers, attorneys, contractors, realtors, municipalities and landowners. Hancock engineering services are comprehensive. They begin with land planning and conceptual design, and follow with the preparation of permit site plans and construction documents.

Hancock's engineering professionals and staff have extensive experience in the design and permitting of a multitude of land development projects. This knowledge supports the development of plans that are tailored to maximize the economic benefit for the client, while being acceptable to the approving authority.

At Hancock, senior project engineers and a majority of the principals are registered professionals, some with multiple registrations, including licensure in Connecticut, Massachusetts, New Hampshire and others. A large staff overall ensure personal attention and service to its clients.

Our engineers thoroughly evaluate physical, Wetland Science and regulatory constraints during the planning and conceptual design phase of a land development project. Hancock uses the latest CAD and engineering design software, including Autodesk Land Development Software, HydroCAD and various hydrologic/hydraulic software, producing high quality, cost effective engineering documents and reports.

Together with the land surveyors and wetland scientists, Hancock's team of engineers affords the technical expertise and interpersonal skills required to sustain the Company's tradition of quality. Every job is viewed as an opportunity to enhance its reputation -among its clientele and the regulatory community.

CIVIL ENGINEERING SERVICES

Our engineering staff is professionally qualified to provide services for the following:

Stormwater Management

- Hydrological Analysis Reports
- Flood Studies
- Federal Emergency Management Agency (FEMA), Flood Evaluation
- Stormwater Management Systems Design
- Stormwater BMP's

Municipal Consulting

- Planning Boards
- Conservation Commission
- Zoning Board of Appeals
- Board of Selectman

Utility Design

- Water Distribution
- Sewer Collection
- Sewer Pump Stations
- Subsurface Sewage Disposal Systems
- Soil Evaluation Testing
- Septic System Inspections
- Disposal System Construction Drawings for Residential and Commercial Projects
- As-Built Certifications

Construction Management

- Review and Preparation of Construction Contracts
- Prepare Construction Bid Packages
- Project Oversight and Documentation Management
- Quality Assurance/Control

WETLAND SCIENCE DIVISION

The Wetland Science Division provides a broad range of services to a variety of clients, including municipalities, developers, utility companies, architects, attorneys, contractors, realtors, and land owners. Hancock's ecological services range from conceptual design with alternatives-analysis to final design and permit acquisition.

Hancock's wetland scientists are experts in wetland delineation, soils evaluations, wetland functional assessment, construction design, regulatory permitting and applicant representation. We are particularly experienced at planning and implementing large-scale wetland delineations; rare plant, animal, or

sensitive ecological community surveys; developing and implementing permitting strategy; and project representation. Our project approach stresses early communication with public and private agencies in order to focus efforts on issues that are of particular concern to regulatory authorities. Additionally, our professionals continuously monitor the ever-changing federal, state and local environmental regulations and policies that impact both inland and coastal projects.

Proper planning and design lead to successful permit acquisition, even for some of the most challenging sites. Hancock's Wetland Science staff has experience in obtaining regulatory approvals for projects ranging from large commercial projects to small residential construction. We also have extensive experience with permitting for coastal projects, including marinas, seawall construction and repair, and construction work within and adjacent to coastal zone resource areas.

During project planning, our demonstrated project experience, coupled with our familiarity with state and local regulations, can provide clients with accurate and reliable due diligence services to identify environmental constraints. We endeavor with every job to enhance our respected reputation among our client and the regulatory community.

WETLAND SCIENCE SERVICES

Our wetland science staff is professionally qualified to provide services for the following:

Vegetation and Wildlife Surveys

Coastal / Inland Environmental Permitting:

- Notice of Intent / Certificate of Compliance
- Chapter 91 Waterways License
- 401 Water Quality Certification
- Army Corps of Engineers Section 404 Permit

Consulting to Conservation Commissions

Development Impact Assessments

Expert Testimony

Land Planning & Environmental Due Diligence Services

Conservation Restrictions & Easements

Vegetation Management Plans for Rights-of-Way

Rare and Endangered Species Assessments

Soil Erosions / Sediment Control

Soil Surveys

Vernal Pool Evaluation and Town Wide Surveys

Wetland Functional Analyses

Wetland Delineation and Mapping

Wetland Restoration, Replication and Enhancement

Wetland Construction Monitoring

Wildlife Habitat Evaluation and Impact Mitigation

Rare Species Assessment and Survey

Massachusetts Environmental Policy (MEPA):

- Environmental Notification Forms (ENF's)
 - Environmental Impact Reports (EIR's)
-



CONTEMPORARY BUILDING Sustainable Development

Qualifications and Experience

Founded in 1999, New Ecology, Inc. (NEI) is an innovative, nationally recognized non-profit Green Building and Sustainable Design firm. Our core work is providing energy efficiency and green building services. We work with our clients to identify and implement practical, cost-effective energy and water conservation solutions, improve indoor air quality and occupant health, and make buildings more durable, less costly to maintain and climate-resilient.

In the last 10 years New Ecology, Inc. helped owners articulate and achieve their greening goals in educational facilities, multifamily housing, community centers, day-care and health care facilities, office buildings and community centers. In the role of Owner's Representative, we add our experience and skills to the expertise of the team and work to incorporate greening strategies as seamlessly as possible. We work on 40-50 new construction projects each year. This enables us to continually learn, further hone our skills, stay ahead of the curve on trends, and most importantly, apply what we learn from one project to the next.

We are not merely advisors, we do the actual work of ensuring that the team's green goals are clear, documented in the plans and specifications, and built as designed. We routinely achieve the highest certification levels for projects and qualify for the maximum incentives and rebates. Whether breaking new ground as an early adopter, or building a conventional high-performance building, the NEI team has a track record of delivering cost-effective results.

Our Services

- **Energy Benchmarking**
New Ecology takes a metrics-driven approach to analyzing proposed energy efficiency retrofit projects in commercial-scale facilities, using data to inform clients' decisions about capital investment and maintenance planning. NEI's data analytics team works with various energy management platforms. NEI cofounded WegoWise, a utility data tracking, benchmarking and analysis software that tracks utility data for over 80,000 buildings nation-wide.
- **Sustainable Design Charrettes**
NEI has led over 100 sustainable design charrettes. We facilitate an integrated design process to transform owner and stakeholder goals and ambitions into deliverable, cost-effective design approaches and bring the project design team into alignment in pursuit of those goals.
- **Engineering Services**
The NEI Engineering team provides support to new construction and existing building projects (eg, plan and specification development/review), pilot projects (eg developing data analysis methodologies), and research and development for new products and services (eg designing and testing protocols in new areas of investigation). They are also involved in discreet client services, like combined heat and power feasibility studies and modeled utility allowances.

- **Energy Modeling**
While we routinely perform the energy modeling required for various green certifications, we are also able to build a “shoebox” model to test multiple design options under consideration in the early stage design process. The model can generate operating energy use estimates associated with building envelope and system options, including structure, façade, insulation, and windows, HVAC systems, lighting, and onsite renewable energy generation;
- **Monitoring & Optimization**
NEI has pioneered the use of circuit-level monitoring of mechanical systems to track system efficiency and define operational changes that extend the life of equipment, save energy and money, and improve occupant comfort. In 2016, NEI was awarded \$600,000 from the Massachusetts Clean Energy Center for a boiler Monitoring & Optimization study involving 100 multifamily buildings. In 2017, NEI contracted with National Grid for a small remote monitoring pilot study in Rhode Island multifamily buildings.
- **Life Cycle Cost Analysis**
Utilizing the energy use estimates from the comparative analysis and system option pricing provided by the cost estimator, NEI is a pioneer in using life cycle cost analysis to guide design decisions, having published its first evaluation in 2005.
- **Green Certifications**
NEI staff have years of experience with LEED, ENERGY STAR, Passive House and other green certifications. NEI understands that green certifications are not a guarantee of performance, durability, or environmental sensitivity, but a system and a means by which high performance can be achieved if applied with the correct spirit and approach. NEI is highly recommended for its capacity to manage and simplify the certification compliance process for design and development teams to ensure a smooth process and maximum benefits.
- **Energy Auditing & Diagnostics**
NEI has extensive auditing experience, including ASHRAE Level I and II. We have a wealth of experience with both energy & water retrofit projects, as well as moderate and substantial rehab projects. NEI’s technical service team also works in the “house doctor” model for owners, to trouble-shoot a particular energy-related operational or cost problem or to provide specific operational support. In addition to many listed previously, the NEI field services team regularly conducts the following tasks through the course of their work:
 - Building Audits -- including ASHRAE Levels I & II
 - Existing Conditions Analysis
 - Diagnostic Testing
 - Systems Optimization
 - Plan Review
 - Cost Benefit Analysis
 - Contractor Training
 - Construction Inspections and Oversight
 - Operations & Maintenance Plans
 - Commissioning Services
 - Post-project Measurement and Verification

Where We Work

NEI is headquartered in Boston; we have regional offices in Hartford, Providence and Baltimore and are currently opening our office in Wilmington, DE. New Ecology has partnered with similar non-profits around the country to form a network of vetted professionals working to achieve greater building performance.

LAUREN A. BAUMANN, LEED AP, NaCPHC
New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
baumann@newecology.org 617-557-1700 ext. 7023



SUMMARY

Ms. Baumann joined New Ecology, Inc. in 2005. She has more than ten years' experience providing technical assistance for clients developing and rehabilitating green affordable housing, educational and cultural facilities, community centers, day-care and health care facilities. At NEI she serves as Vice-President. During her time at NEI she has provided technical assistance to "green" thousands of units of affordable housing in the Boston Metro area and beyond, including Energy Star, Enterprise Green Communities and LEED certifications. Working with NEI's clients she has raised millions of dollars in grant and rebate funds to support energy efficiency, renewable energy and other green features. She is a Senior Fellow in the New England Region Environmental Leadership Program. Ms. Baumann holds a degree in Biology from Cornell and a Masters in Urban and Environmental Policy and Planning from Tufts.

EXPERIENCE

New Ecology, Inc.
Boston, Massachusetts

June 2005-Present

Vice President, Senior Associate, Associate

Vice President of an innovative environmental organization that serves as a catalyst for community-based sustainable development projects.

- Trains and supervises a team of project managers to provide technical assistance on the design, construction, retrofit, and operation of high performance affordable housing and community buildings
- Advances a climate change resilience practice with state and local government agencies and owners of multifamily housing portfolios in Massachusetts and New York
- Assists with budgeting, strategic planning, staff and board management, and growth and expansion across the organization
- Specializes in the implementation of the green integrated design process; specifically, charrette facilitation, project team coordination, contractor/sub-contractor training, and resident education.
- Facilitates coordination with governmental agencies, utilities and utility program administrators, and other related organizations and has raised millions of dollars in grant and rebate funds to support efficiency, greening, and renewable energy features on projects
- Coordinates project certifications through EPA Energy Star Homes, various USGBC LEED rating systems, and Enterprise Green Communities
- Presents on the practical implementation of green affordable housing at various conferences and forums

Estee Lauder
Melville, NY

June 2003-August 2004

Junior Chemist

- Formulated skin care products to meet marketing, regulatory, and patent guidelines
- Performed formula modification, batch production, and stability and safety testing
- Initiated water filter recycling at division-wide level and paper recycling within lab

ASHLEY WISSE, EIT, CEM, LEED AP

New Ecology, Inc.

15 Court Square, Boston, MA 02108

wisse@newecology.org 617-557-1700 x. 7043



Community-Based Sustainable Development

SUMMARY

Ms. Wisse joined New Ecology, Inc. (NEI) in 2012. At NEI, she manages the greening of new construction and major renovation projects, primarily in multi-family affordable housing. Ms. Wisse provides technical assistance to meet certification criteria for green building programs including LEED, Enterprise Green Communities, and Energy Star, as well as securing utility rebates. From 2010-2012 she was an Architectural Engineer at Wiss, Janney, Elstner Associates, Inc., where she served in a variety of roles including team coordinator and captain, test manager, and stakeholder liaison. Ms. Wisse holds a Bachelor's of Science in Civil Engineering from Syracuse University and a Master's of Science in Architectural Engineering from The Pennsylvania State University.

EXPERIENCE

New Ecology, Inc.

Boston, MA

October 2012 – Present

Project Manager – New Construction

- Organization of all sustainability documentation for code compliance, jurisdictional requirements, and/or desired certification compliance
- Documentation of 30+ LEED certifications in the Homes, Building Design and Construction, Commercial Interiors, and Healthcare rating systems in MA, NY, NJ, PA, and CT; finalizing multiple certifications at the Silver, Gold, and Platinum thresholds
- Documentation of Enterprise Green Communities certification for 200+ multifamily units
- Feasibility studies and utility rebates for renewable energy installations including Solar Photovoltaics, Solar Water Heating, Co-Generation, and District Heating and Cooling

Wentworth Institute of Technology

Boston, MA

August 2016 – April 2017

Assistant Professor - Department of Construction Management

- COMN 2000 Construction Surveying (Fall 2016)– theory and technique for measurements with theodolite, automatic levels, steep tapes, and total stations; projects completed using linear measurements, leveling, traversing, and stadia
- COMN 3000 Materials Testing and Quality Control (Fall 2016) – study of the uses and properties of aggregate, soils, and asphalt, including procedure and analysis of results for ASTM-approved testing; establishment of design criteria and appropriate inspection and quality testing
- COMN 1500 Construction Graphics: Plan Reading and Revit Design (Spring 2017) – introduction of fundamentals of drawing techniques; how to read and interpret information on civil, architectural, and structural prints; fundamentals of Revit modeling

Wiss, Janney, Elstner Associates, Inc.

Boston, MA

November 2010–September 2012

Architectural Engineer: Associate II

- Team Coordinator & Manager for ASHRAE Whole-Building Air Tightness Testing
- Document Control & Construction Activity Observation of building upgrades and repairs

California Public Interest Research Group
Berkeley, CA

Fall 2002

UC Berkeley Campus Organizer

- Coordinated campaigns for non-profit student organization that addressed environmental, democratic, and social justice issues
- Recruited students volunteers and interns, executed grassroots fundraising and taught intern class

EDUCATION AND TRAINING

Tufts University, Medford, MA
Master of Arts in Urban and Environmental Policy and Planning

2006

Cornell University, Ithaca, NY
Bachelor of Science in Biology, Ecology concentration

2002

CERTIFICATIONS:

US Green Building Council – LEED Accredited Professional: Building Design and Construction and Homes
Passive House Institute U.S. (PHIUS) – Passive House Certified Consultant (NaCPHC)

AWARDS AND AFFILIATIONS

Wild Gift – Recipient, Alumni Board Member, Alumni Council Member
Environmental Leadership Program - New England Regional Network – Fellow

SERVICES DESCRIPTION

NORIAN/SIANI ENGINEERING, INC. is a thirty year old, energy-oriented consulting engineering firm with expertise and experience in virtually all phases of mechanical, electrical, plumbing and fire protection building systems engineering, sustainable system design and energy cost reduction projects. We design and specify complete building systems for new construction and renovation projects, provide engineering analyses and reporting on a myriad of subjects and deliver educational seminars on all relevant topics.

Our design engineering experience includes projects from a few hundred dollars to those requiring several million dollars of HVAC, plumbing and electrical work. Many of the buildings on which we work are historically registered; accordingly, we have a particular sensitivity for buildings and their architecture. Study projects include master plans and energy cost reduction studies, as well as engineering feasibility and problem solving reports embracing industrial, commercial, and residential facilities. Our business serves the systems in buildings where we work, study, worship, play, heal, and live. We have a proven track record for design work in offices, schools, libraries, museums, religious and recreational facilities, residential buildings and hospitals.

Our special skills and broad building experience allow us to embrace the project as a whole and engineer solutions that work. Often, mechanical and electrical systems are relegated to an afterthought resulting in poor coordination with the building functions and its architecture. We have practiced "Sustainable/Green" design since before it received these formal names. Using energy efficiency concerns as a constant filter, our design decisions are grounded by more than first cost and expediency. Our goal is to provide our clients with engineered solutions that best fit their project requirements with respect to cost, performance and operating economy.

EXPERIENCE & CAPABILITIES:

DESIGN ENGINEERING

- ◆ HVAC
- ◆ Plumbing
- ◆ Electrical
- ◆ Fire Protection
- ◆ Controls
- ◆ Co-Generation
- ◆ Renewable System Design

EDUCATION

- ◆ Seminars
- ◆ Workshops
- ◆ Educational Documents

STUDY WORK

- ◆ Feasibility Analysis
- ◆ Master Planning
- ◆ Energy Conservation & Planning
- ◆ Capital Needs Assessment
- ◆ Industrial Process
- ◆ Industrial Facility Planning
- ◆ Capital Needs Assessment

SUSTAINABLE DESIGN/CONSULTING

- ◆ LEED Certification
- ◆ Building Energy Modeling
- ◆ Project Specific Study and Analysis
- ◆ Emissions Calculations
- ◆ Water Conservation
- ◆ Utility Rebates

Sergio F. Siani, LEED AP
President
Norian/Siani Engineering, Inc.

Resume
1984 to present
Concord, MA

Mr. Siani has over thirty years experience in the HVAC and mechanical engineering design field. He is managing partner for the firm of which he is a co-founder. Mr. Siani provides project management and design engineering for a complete spectrum of clients. He is especially well versed in the complexities of public sector and sensitive architectural projects, including master planning, municipal buildings, multi-family housing, schools, museums, and religious facilities. Additionally, Mr. Siani provides design for systems serving the high-end residential market including many projects in the multiple million-dollar range. As an engineering and sustainable design expert, he has been an invited lecturer at MIT, Wentworth, the BAC, and other private institutions. As the designer of conventional and unique systems, he is expert in the technology required for HVAC, plumbing, control, and lighting system design. He has provided design for many, large scale electric to gas heating system conversions and authored numerous computer analysis programs for building energy performance modeling and system design.

Faculty
Boston Architectural Center

1995 to 20067
Boston, MA

Mr. Siani has taught mechanical engineering and sustainable system design to architectural students, performs thesis review, and though he currently is not teaching classes, contributes on curriculum issues as a member of the technology faculty.

Project Engineer
Energy Design Team

1980-1984
Boston, MA

Mr. Siani provided mechanical system design with an emphasis on energy conservation and was responsible for design review of HVAC and lighting systems for various speculative commercial real estate properties, coordination of full service mechanical and electrical engineering for low income housing, and design of unconventional HVAC systems including ground tube cooling and both active and passive solar systems. He also provided programming of building thermal performance computer models and economic analyses and a unique market feasibility study for district heating in the City of Cambridge, Massachusetts.

Consultant
Federal Dept. of Energy

1980-1981

Provided technical engineering review for Appropriate Technology Grant Cycle.

Publications

Button Up Your Business

Massachusetts Executive Office of Energy Resources,
Resource book for energy conservation in small business.

Education

B.S., Energy Sciences, The Evergreen State College
Continuing Education, Northeastern University

Certifications & Associations:

LEED Accredited Professional

MCPPPO – Massachusetts Certified School Project Designers & Owner's Project Manager

MIPL - Technical Advisory Board Member, Massachusetts Interfaith Power & Light

George A. Comatas, P.E.
Senior Mechanical Engineer
Norian/Siani Engineering, Inc.

Resume
1996 to present
Concord, MA

Mr. Comatas is a registered mechanical engineer in the State of Massachusetts and has eighteen years of experience in the HVAC and Mechanical Engineering Design field. Currently Mr. Comatas is responsible for design of heating, air conditioning, and plumbing systems. His expertise includes conceptual design, heating and cooling load calculations, equipment selection, construction administration, and project coordination. His expertise in code analysis is deep and has preformed code review for project both in house and for other client needs. He also manages IT systems for the firm and also heads the AutoCAD drafting department where duties include development and implementation of CAD standards. Experienced in a broad range of projects from both the public and private sectors his recent projects include multi-family housing, campus central plants, gas conversions, high-end residences, churches, offices, public housing, and libraries.

Design Engineer
Warren & Panzer Engineers, P.C.

1991 to 1996
New York, NY

Responsibilities included preparation of plans and specifications, project management, indoor air quality investigations, cross connection control compliance, Phase-I Environmental Site Assessments, asbestos and lead investigations and remediation, environmental class instruction, client service and relations, report preparation and presentation.

Engineer/Field Technician
Warren & Panzer Engineers, P.C.

1989 to 1991
New York, NY

Responsibilities included maintenance of project log, inspection of work performed, ensurance of compliance with specifications and code, and other construction management tasks. This was a part-time employment position while he finished his college degree.

Education

Clarkson University, Potsdam, New York
Bachelor of Science, Mechanical Engineering

Certifications/Registrations:

Massachusetts, PE – 46467
New York State Engineer-in-training
RMD LPA-1 Lead Based Paint Analyzer Certificate
New York State Asbestos Investigator, Management Planner, etc

Associations: NFPA

Matthew Bean, P.E., LEED AP
Senior Mechanical Engineer
Norian/Siani Engineering, Inc.

Resume
2002 to Present
Concord, MA

Mr. Bean is a registered mechanical engineer in the State of Massachusetts and Maine with sixteen years of experience in the HVAC, plumbing, fire protection and mechanical engineering design field. Currently Mr. Bean is responsible for project management and design engineering for a complete spectrum of projects. He is responsible for performing mechanical, plumbing, fire protection and electrical engineering tasks, project management and engineering management. Projects encompassing high-end residential, multi-family residential, commercial, industrial and institutional facilities. He has extensive experience in both renovation and new construction. Mr. Bean has significant experience in design of sustainable energy systems and off-grid facilities.

Faculty
Boston Architectural Center

2004 to 2006
Boston, MA

Mr. Bean taught sustainable system design to architectural students. He has also provided thesis review and advising to a number of architectural students.

Mechanical Engineer
SMRT Inc.

2002 to 2002
Portland, ME

Responsible for performing mechanical engineering tasks including, estimating heating and cooling loads, equipment selection, preparation of plans, specifications and bidding documents as well as field data collection. Projects encompassed correctional, commercial, industrial, health care and educational facilities and included HVAC, plumbing and fire protection design for new construction and renovation projects.

Mechanical Engineer
Norian/Siani Engineering, Inc.

1998 to 2002
Waltham, MA

Responsible for performing mechanical and electrical engineering tasks including, estimating heating and cooling loads, equipment selection, preparation of plans, specifications and bidding documents as well as field data collection. He was also responsible for CAD drafting of the various design projects. Projects encompassed commercial, industrial, institutional and high-end residential properties and include HVAC, electrical and plumbing designs for new construction, renovation and energy efficiency retrofits.

Production Engineer & Supervisor
Lantor Inc.

1996 to 1997
Bellingham, MA

Supervised of 15-person shift in production of non-woven textiles. Directed in process quality control and troubleshooting. Assisted in product design and process development. Performed numerous special manufacturing engineering and facility management projects.

Education
Worcester Polytechnic Institute, Worcester, MA
Bachelor of Science, Mechanical Engineering

Certifications/Registrations:
LEED Accredited Professional:
Massachusetts PE – 45007 Maine, PE – 10372

Associations: NFPA

Benjamin R. Czarnecki
Engineer/Drafter
Norian/Siani Engineering, Inc.

Resume
September 2007 - present
Concord, MA

Mr. Czarnecki is responsible for the analysis and engineering design of mechanical, plumbing and renewable energy systems. His work also includes conceptual design, heat loss/gain calculations, equipment selection and feasibility studies. He has worked on multiple LEED certified projects including computer thermal modeling, analysis, application paperwork, analysis applications and related efforts. He also regularly completes construction administration phase inspections and reporting.

Project Engineer
Bentley Publishers

September 2006 – December 2006
Cambridge, MA

Mr. Czarnecki was responsible for completing wiring diagrams for BMW 7 Series and MINI Cooper convertible. He also disassembled, repaired, upgraded, documented and photographed cars for repair manuals, and created pages for inclusion with various repair manuals.

Museum of Science
Exhibit Operations Technician

September 2006 – September 2007
Boston, MA

Mr. Czarnecki was responsible for repairing and maintaining damaged exhibits. He designed new exhibits, and used a large variety of carpentry and machine tools (soldering iron, crimpers, drill press, table saw, and grinding wheel). He also worked to repair and develop communication systems with the museum.

Town of Burlington
Summer Assistant

June 2003 – September 2005
Burlington, CT

Mr. Czarnecki worked directly with the Chief Mechanic to repair operational vehicles (clutches, gas tanks, air brakes, axles, window motors, water pumps, sand hoppers, etc.). Repaired town roads and facilities.

Experience using multiple tools and machines (Hydraulic lift, impact gun, standard wrenches, etc.).

Experience landscaping (Hedge trimming, mowing large fields, mulching, trimming, aerating, fertilizing, sodding, etc.).

Education

Wentworth Institute of Technology, Boston, MA, September, 2007
Bachelor of Science in Mechanical Engineering Technology

Benjamin M. Kelchlin
Engineer/Drafter
Norian/Siani Engineering, Inc.

Resume
September 2011 - present
Concord, MA

Mr. Kelchlin is responsible for the drafting of the Mechanical and Plumbing design work as provided by the Engineers of the company including the transferring of hand sketches on to AutoCAD, and the editing of existing drawings.. Also is responsible for design/study work of heating, air conditioning, and plumbing systems. Expertise includes conceptual design, heating and cooling load calculations, equipment selection, construction administration, and project coordination.

Homeworks Energy,

April 2011 – September 2011
Winchester, MA

Energy Assessor. Undertaking a lead role in assessing the energy needs of residential buildings and advising clients on the best methodology of how to improve overall building performance through weatherization methods. Manage client database, allocate clients, and performing Energy Assessments under the guidelines of the MassSave program. Management of inventory and closely working with installation crew to ensure a complete, thorough, and quality installation is maintained through the work process.

Rural Renewable Energy Alliance (RREAL)

August 2009 – March 2011
Pine River, MN

Mechanical Engineer. Starting as an AmeriCorps VISTA helping to build capacity of the organization by my involvement in R&D of a proprietary solar air heat collector that would be installed on low income family occupied homes. Design improvements, manufacturing quality control, and program assistance were part of my responsibilities until I was taken on full time with the organization, after a year, at which point I helped in the expansion of the manufacturing shop – ordering and setting up new equipment, and helping to install these air heat systems, solar hydronic, and photovoltaic systems to further the organization's mission

PermaCold Engineering Inc

May 2008 – August 2009

Assistant Chief Engineer. Assisted engineering staff in the design and analysis of industrial refrigeration systems; performing stress analysis on pipe using TriFlex Windows software, selected emergency relief valves, seismic constraints per code, system management, material acquisition, and other engineering tasks.

Education

Rochester Institute of Technology, Mechanical Engineering Technology Rochester, NY
Bachelor of Science, May 2007

Honors: Phi Theta Kappa National Honor Society Scholarship, Deans List, Presidents List, Tau Alpha Pi Engineering Technology Honor Society

SUNY Canton College of Technology, Mechanical Engineering Technology Canton, NY
Associate in Applied Science, May 2004
Engineer in Training, Oregon Certification No. 82576EI

Andrew J. Wilkinson
Engineer

Norian/Siani Engineering, Inc.

Resume
January 2014 - present
 Concord, MA

Mr. Wilkinson is responsible for the drafting of the Mechanical and Plumbing design work as provided by the Engineers of the company including the transferring of hand sketches on to AutoCAD, and the editing of existing drawings.. Also is responsible for design/study work of heating, air conditioning, and plumbing systems. Expertise includes conceptual design, heating and cooling load calculations, equipment selection, construction administration, and project coordination.

Blazing Design, Inc. Intern, Essex Jct., VT

2013-2013

Coordinated with President Michael Van Buren PE, to design and develop plans for masonry fireplaces, perform construction inspections, create specifications and details for designs, assist with proposal submittals, create 3D SketchUp models as well as coordinate designs with clients and architects.

Developed AutoCAD plans for masonry fireplaces and created estimates for masonry fireplace systems. Educated in energy requirements set forth for both gas and masonry system standards by the Vermont Residential Energy Code.

ShackletonThomas, Artist-In-Residence, Bridgewater, VT

2010-Present

Coordinate custom design projects directly with CEO and designer, Charles Shackleton, as well as other team members. Duties also included creating material and labor estimates for custom wood products, coordinating with Shackleton Thomas employees to meet company needs, interface with clients to create relationships.

Vermont Agency of Transportation, Royalton, VT

2010 (Summer)

Worked with engineers and field technicians to analyze existing conditions of bridge elements such as faulty/degraded expansion joints. Duties included routine bridge inspections, temporary bridge installation, abutment repair, sidewalk repair and bridge deck repair. Work also included with construction team to build formwork, construct and pour plug joints, install proper VOSHA staging as well as traffic management operations.

Montpelier Alive, Consultant, Montpelier, VT

2011-2012

Developed plans for schematic site layout designs for the Carr Lot; a brown field revitalization project. Responsibilities also included collaborating with Founder of the Vermont River Conservancy Center, along with the city hall manager and VTC professor, Ward Joyce, throughout preliminary stages of planning.

Naked Table Project, Instructor, Bridgewater, VT

2010-Present

Responsibilities include educating visitors and table-makers on the construct of Shackleton Thomas's naked table, which is made out of locally sourced Vermont Sugar Maple Trees. Also workd with people ranging from elementary school to senior citizens and assist with team building exercises to accomplish goals.

Education

2009-2013 Vermont Technical College
 Architectural Engineering and Technology & Sustainable Design and Technology
 B.S. AET, B.S. SDT

2005-2007 Roger Williams University
 School of Architecture, Art and Historic Preservation

Achievements

Dean's List at VTC, multiple semesters

Rodney W. Smith
Engineer

Norian/Siani Engineering, Inc.

Resume
April 2006 - present
 Concord, MA

Plumbing Engineering: Mr. Smith is responsible for plumbing system design, including potable, waste, vent, and gas systems, pipe sizing, flow calculations, and code research, as well as other piping system design and equipment and fixture selection. He coordinates with civil and other project engineers and architects, completes studies, reports and correspondence, and provides construction phase administration. Mr Smith provides gas system permitting and service applications, including elevated gas pressure systems. He also provides backflow prevention system design and documentation.

Fire Protection Engineering: Responsible for sprinkler head selection and layout and pipe locations within project environments.

Mechanical Engineering: Responsible for heating and cooling load calculations, equipment selection, duct sizing and design, hydronic heating system design, and construction administration.

Premier Care Technical Support Analyst

Genuity, Inc.

November 2001-February 2003

Woburn, MA

Mr. Smith managed all technical operational issues for Premier-level Enterprise customers, provided pro-active support for all aspects of customer LAN-WAN interface, including firewalls, web server facilities, VPN, VoIP, and lease-line connections organized and coordinated company resources for all maintenance windows which affected customer, acted as customer 'voice' in all network issues and as ombudsman for Genuity in relations with customers.

Network Analyst

GTEInternetworking/Genuity, Inc.

November 2000-November 2001

Burlington, MA

Mr. Smith provided network analysis and technical support to customers for internet connectivity problem resolution, security, and/or web hosting networks. Independently resolved complex system failures through isolation, analysis and troubleshooting procedures, usually through direct data link from centralized diagnostic center or via telephone. Required strong interpersonal skills to interact with customers, carriers and/or other functional groups; worked with network engineers to improve service delivery and/or system functionality.

Education

Lewis and Clark College, Portland, Oregon, International Relations and Communications, BA
 Computer Science and Mathematics courses through Harvard Extension School, Cambridge, MA
 Technical Writing Course through local Community Education

OTHER EXPERIENCE

Community Representative, Harvard Medical School - IACUC on Animals in Science **2005-Present**
 Participates in monthly committee meetings; Reviews submissions of Experimental Protocols to confirm compliance of various laboratory and surgical protocols and procedures as defined by OLAW, AAALAC, and USDA regulations. Performs animal facility inspections semi-yearly, for USDA-covered and Non-USDA-covered animals

Technical Assistance Center, BBN/BBNPlaNet, Cambridge, MA 1995-1996
 Harvard College Core Program Administrator, Cambridge, MA, August 1988-January 1995
 Board of Directors, Allston-Brighton YMCA 1987-1988
 Dental Technician, 1979-1980
 Sports Department Assistant, Portland Oregon, 1981-1984
 Intelligence Analyst, USAF, 1976-1979

FIRM PROFILE

For the past four decades, DM Berg Consultants, P.C. has focused our expertise on client needs. Our founder, David Berg, has instilled this as our number one priority in the practice of providing sound, efficient engineering solutions today and in the future.

The methods we use to successfully achieve our goals are open communication, thorough coordination with disciplines involved, and sharing information with our clients. We work well in both public and private sectors providing service to architects, owners, developers, municipalities, states, construction managers, general contractors, and other engineering professionals. This open approach allows our team to maintain strong client relationships and have a keen understanding of our client's concerns to accomplish a project's objectives.



Gerald and Darlene Jordan Boys & Girls Club

DM BERG CONSULTANTS, P.C.

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Needham, Massachusetts 02494

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DM BERG CONSULTANTS, P.C.



Landmark Square Apartments



Linden Ponds at Hingham



Millennium Bostonian Hotel

Photo Credits

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Linden Ponds at Hingham

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Millennium Bostonian Hotel

- DM Berg

Gerald and Darlene Jordan Boys & Girls Club

- DM Berg

Boston University's Florence & Chafetz Hild House

- Steffen Bradley

SERVING THE INDUSTRY
SINCE 1963

SERVICES

We provide quality service in the following areas: building analysis and design, renovation of existing structures, failure analysis/forensics, structural tests and inspections, independent structural engineering reviews, feasibility studies, due diligence surveys, historical preservation, building envelope investigations, and comprehensive on-site surveys.



Whether we are faced with a large complex project, or one of smaller scale, we treat each with equal importance and aim to complete the project in a successful manner.

Many of our client relationships have remained loyal for decades because they have gained a unique trust in us to provide them with our honest professional opinion. We listen to their issues of serious concern and work towards economical sensible solutions.

PROJECT TYPES

We have served as structural consultant on a vast majority of project types, including:

- ASSISTED/SENIOR LIVING
Complexes and Communities
- CIVIC
Libraries, Town Halls, and Maintenance Facilities
Prisons, Court Houses, and Police/Fire-Fighting
Facilities
- COMMERCIAL
Offices and Manufacturing
- EDUCATIONAL
PK-12, Colleges, and Universities
- ENTERTAINMENT
Cinemas, Theaters, and Sports Stadia
- HEALTHCARE
Hospitals, Medical Centers, and Nursing Homes
- HOSPITALITY
Hotels and Convention Centers
- PARKING GARAGES
Stand-Alone, Attached Above-Grade, and
Below-Grade
- RESIDENTIAL
Multi-Family Apartments and Condominiums
- RETAIL
Restaurants, Stores, Malls, and Supermarkets

SPECIALTY

Save the Building Envelope!

Common problems investigated include: deterioration due to weather, age, or corrosion; poor construction; substandard flashing details; damage from wind, snow, fire, and overloading; deterioration in concrete, masonry, and stucco; leakage in parking garages and buildings; and foundation settlement issues.



By rendering our services, we have assisted

owners, developers, property managers, etc. with identifying the root cause of the specific deterioration as well as pinpointing the moisture source(s). We then prepare repair recommendations and produce complete construction repair documents (plans and specifications) and when requested, assist with the execution of our recommendations.

STRUCTURAL DESIGN

ALI R. BOROJERDI, PE, LEED AP

VICE PRESIDENT

aborojerdi@dmberg.com

• EDUCATION

Master of Science Degree
in Civil Engineering (1986)
University of Minnesota
Minneapolis, Minnesota

Bachelor of Science Degree
in Structural Engineering (1976)
Sharif University of Technology
Tehran, Iran

• PROFESSIONAL MEMBERSHIPS

American Society of Civil Engineers
Boston Society of Civil Engineers Section
Boston Association of Structural Engineers
National Council of Examiners for
Engineering and Surveying
Boston Society of Architects

• REGISTRATIONS

Massachusetts
Connecticut
Maine
New Jersey
New York
Rhode Island

Ali Borojerdi serves as Vice President and Treasurer of the firm. Mr. Borojerdi graduated from the University of Minnesota and holds a Master of Science Degree in Civil Engineering. He is a licensed professional engineer in several states and has over 25 years of varied experience in the field of structural engineering in all phases of design and project management.

Mr. Borojerdi has worked on various structures including: educational facilities; office, residential, and commercial buildings; parking garages; hospitals; athletic facilities; maintenance facilities; and wastewater treatment structures. Ali's work experience includes, but is not limited to: Structural analyses and designs; investigations and reporting; Distress and failure investigations and analyses; and Independent structural engineering reviews.

Sampling of Projects:

Baker Chocolate Lofts, Dorchester, Massachusetts

The project consists of the adaptive reuse of the historic former Walter Baker Chocolate Factory. It consists of the renovation of the historic mill building into modern loft-style units while maintaining the historic nature of the building.

Center School, Stow, Massachusetts

Performed a feasibility study.

Lunenburg High School, Lunenburg, Massachusetts

Performed a feasibility study.

North Shore Agricultural Technical High School, Essex, Massachusetts

Performed a feasibility study.

Pompositticut School, Stow, Massachusetts

Performed a feasibility study.

The Penmark (Harrison Commons), Boston, Massachusetts

Designed and managed the renovation of the former five-story Boston College High School to create interior space to be used for luxury loft condominiums. One goal was to maintain the exterior façade and roof of the building for historic preservation concerns.

The Ocean Club, Revere, Massachusetts

Structural design for this 13-story "resort-style" building located on Ocean Drive in Revere Beach, with 242-units planned for opening in 2008.

Tufts University Parking Garage, Medford, Massachusetts

Structural design of a 7-story building on the Medford portion of the main campus involving new construction of six levels of parking (210,000 s.f., 510 spaces) and one level of office space (32,000 s.f.)

Taunton High School and Parker Elementary School, Taunton, Massachusetts

All phases, including feasibility study, provided for the 489,000 sq.ft. of renovation/addition and about 64,000 sq.ft. of new construction for the Town of Taunton's expanding school population.

The Watch Factory, Waltham Massachusetts

Rehabilitation/reuse of this historic complex on the Charles River. The 400,000 SF complex will be transformed into a mix of offices, loft-style apartments and retail uses with riverfront amenities. An enclosed pedestrian bridge will be added to connect tenant spaces.

DMBC
STRUCTURAL ENGINEERS

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WILLIAM H. BARRY, PE

ASSOCIATE

wbarry@dmberg.com

• EDUCATION

Master of Science Degree
in Civil Engineering (1995)
Worcester Polytechnic Institute
Worcester, Massachusetts

Bachelor of Science Degree
in Civil Engineering (1993)
Worcester Polytechnic Institute
Worcester, Massachusetts

• PROFESSIONAL MEMBERSHIPS

American Society of Civil Engineers
Boston Society of Civil Engineers Section

• REGISTRATIONS

Massachusetts

William Barry is responsible for the design of various projects that range in size and encompass a breadth of building types and building materials. He has been involved in the design of public and private educational facilities, libraries, police and fire stations, cinemas, multi-family residential, office, and commercial buildings. Additionally, Bill has worked on temporary shoring and framing design projects to support cranes and other construction equipment on existing or new structures. He has been involved in the investigation and design of alterations, repairs and additions to existing structures of varying ages and materials.

Mr. Barry has also been involved in a number of wood framed building projects, which led to his involvement in the development of Chapter 23 for the upcoming Seventh Edition of the Massachusetts State Building Code. Bill works within our team to provide complete structural design from schematic design to construction administration.

Sampling of Projects:

160 Pleasant Street Apartments, Malden, Massachusetts

Design and construction administration for this project composed of a steel framed 204 unit apartment building with three levels of parking below. To eliminate the need for ramps, the project takes advantage of the naturally sloping site such that the three levels of parking garage are accessed from the three surrounding streets.

704 Main Street, Falmouth, Massachusetts

Design and construction administration of this new 3-story wood frame apartment building with one-story of steel framed retail area along Main Street in Falmouth

Double Tree Hotel and Chinatown YMCA, Boston, Massachusetts

Provided the structural design for the conversion of an existing technical high school into a hotel and YMCA. Unique structurally separate 3-story steel framed hotel addition was constructed above the existing gymnasium on new steel columns and steel bracing that penetrated the existing gym structure.

Jewish Community Housing for the Elderly-Shillman House, Framingham, Massachusetts

Design of the Shillman House which will be an active and supportive living community for independent seniors. The building will have 150 one- and two-bedroom apartments with full kitchens. The hub of the building will be common space that will include a state-of-the-art fitness center, computer center, library, art studio, multipurpose room, and convenience store. The building will be fully elevator equipped and parking will be available. The site will be beautifully landscaped and close to half of the almost nine acre property will remain as open space.

St. John of God Hospital Adaptive Reuse, Brighton, Massachusetts

Designed this multi building project including two new buildings and rehabilitation of three existing buildings. The new assisted living facility and condominium buildings are 5 stories of concrete block and precast hollow core plank with structural steel framed roofs and lightgauge metal mansard roofs and dormers. The hospice care building was created from an existing 3-story brick bearing wall residence by new 3-story wood framed additions. Additional condominiums will be created in the 4-story former hospital administration building, including the addition of an elevator.

Homes at New London, New London, Connecticut

Design of garages, front porches and entry ways; infill of stairways as required; condominium community building; and rental community building; periodic site visits as required.



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CONSULTING ENGINEERS
570 Hillside Avenue
Needham, MA
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p 781 444-5156
f 781 444-5157
www.dmberg.com

Nelson Hammer, RLA

Professional Overview

After spending 23 years with two large architectural firms (The Architects Collaborative [TAC] and Earl R. Flansburgh + Associates [ERF+A]), Nelson Hammer established Hammer Design in 1992 and then spent 18 years as an independent practitioner prior creating Hammer+Walsh Design Inc. with David Walsh in 2010. The great majority of his experience- as an employee and as a firm owner- has been in support of architects in the site planning of buildings.

Nelson has developed several areas of specialization/interest during that time: public sector work, such as municipal buildings and playgrounds; multi-family housing (particularly affordable housing); medical facilities site planning for hospitals, assisted living and acute care nursing facilities; educational facilities site planning, from elementary to collegiate levels; and interior landscape design, a field in which he has gained a national reputation as a designer, lecturer, and author.

Nelson's tenure at TAC was characterized by his involvement in large-scale, complex site planning projects such as hospitals, college buildings, and commercial structures such as Copley Place in Boston, for which he served as project manager for exterior and interior landscape architecture. As Director of Landscape Architecture at ERF+A, he oversaw the site planning and construction of more than two dozen elementary and secondary schools. His experience at Hammer Design focused on public sector work, multi-family and affordable housing, and playground renovation, and as a result, he has developed considerable expertise in the use of cost-effective construction techniques and the use of plants and hardscape materials that require minimal maintenance.

Partial List of Project Experience

- *JFK Apartments, Cambridge, MA:* Working with HKT Architects, Mr. Hammer provided site planning services for a comprehensive renovation of an existing subsidized housing property.
- *First Realty Management Company:* Mr. Hammer has had a decade-long collaboration with a company that owns and manages thousands of both market rate and affordable apartment units. This has included site planning work at Stony Brook Commons in Roslindale, Brandywyne Village in East Boston, Mountain Village in Worcester, and Battles Farm Village in Brockton.
- *Parkview Homes, Newton, MA:* One of multiple collaborations with Winslow Architects was this LEED Silver-certified property consisting of 10 single family mixed income units in Newton, MA.
- *Alta Stone Place, Melrose, MA:* bh+a Architects retained Nelson Hammer to provide landscape architectural services for a mixed income complex that includes three new buildings and the adaptive reuse of a former mill building into housing units.
- *Waldo Court, Wellesley, MA:* Another Winslow Architects collaboration, Waldo Court consists of three buildings on a very tight, hilly site a block away from Wellesley center.

Awards

- Florida Nurserymen and Growers Association: State Award of Excellence for Copley Place
- American Association of Nurserymen: National Landscape Award for Copley Place
- Boston Society of Landscape Architects: Award of Excellence for Copley Place
- Professional Interior Landscape Association: Highest Honor Award for Guest Quarters Suite Hotel
- Boston Society of Landscape Architects: Merit Award, Communications, for *Interior Landscape Design*
- Boston Society of Landscape Architects: Honor Award, Communications, for *Interior Landscapes, An American Design Portfolio of Green Environments*

Registration

Massachusetts, Landscape Architecture, #550



JFK Apartments, for the Cambridge Housing Authority



The Fairways, Worcester, MA; an FRM mixed income community

Published Works

Books

- *Interior Graphic Standards*, Second Edition, John Wiley & Sons, New York, December, 2010, Author of Interior Landscapes Section
- *Interior Landscapes: An American Design Portfolio of Green Environments*, published by Rockport Publishers, Gloucester, MA, February, 1999; Author
- *Interior Landscape Design*, published by McGraw-Hill, New York, 1992; Author
- *Interior Graphic Standards*, published by John Wiley & Sons, New York, 1st Ed., 2003
Author of chapter on Interior Landscaping
- *Time Saver Standards for Landscape Architecture*, published by McGraw-Hill, New York, 2nd Ed. 1998, Contributing Reviewer, Contract Documents Section; Author, Interior Landscapes Section
- *Guide to Interior Landscape Specifications*, published by the Interior Plantscape Division of the Associated Landscape Contractors of America, Herndon, VA, Fourth Edition, 1988, and Fifth Edition, 2003: Contributing Editor; Author of Appendix on Lighting

Teaching Experience

- 1993: New England School of Art & Design, Boston, MA
- 1980 to 1989: Harvard University Graduate School of Design, Cambridge, MA
Continuing Education Curriculum
- 1973: Boston Architectural Center, Boston, MA

Hammer + Walsh Design Inc. Landscape Architecture + Master Planning

300 A Street -Lobby Level- Boston, MA 02210 + (617) 670-0257 + dw@hammerwalsh.com

David M. Walsh, RLA, RA, LEED AP®

Professional Overview

David Walsh has over thirty years experience and is registered as both a landscape architect and architect and is proficient in all aspects of site assessment and analysis, design, contract documentation, and construction administration.

Dave is particularly interested in multi-family housing projects that sustainable environments for their community of users.

Prior to forming Hammer + Walsh Design Inc. with Nelson Hammer in 2010, Dave provided design services through DW + Design Group and, previous to that, he was a Principal at both the Planners Collaborative, Inc. (PCI) and Copley Wolff Design Group (CWDG). During this decade-long period from 1998 to 2007, Dave was involved in a number of urban recreation and park projects throughout the New England area. Dave was also in private practice in Michigan in the early 1990's following employment at Earl R. Flansburgh + Associates, where he designed a number of educational facilities and was head of the Construction Administration Department. Earlier in his career, Dave was a landscape architect at Carol R. Johnson and Associates(CRJ+A), where he produced site designs for the Massachusetts Audubon Society, and at The Architects Collaborative, (TAC) where he participated in large-scale site projects throughout New England as well as campus planning projects in the Middle East.

Partial List of Project Experience

- *Spicket River Greenway*: Now nearing completion, this 2.5 mile bicycle and pedestrian trail along both banks of the Spicket River as it flows through various neighborhoods in the City of Lawrence. This linear public amenity will provide enhanced access to the waterway itself as well as contribute to the open-space network of this reemerging urban center.
- *Union Crossing, Phase 1*: Designed for Lawrence Community Works, This is a master plan, conceptual design, and construction document package for a former mill site along the Merrimack River in Lawrence, MA. It will provide for a new, mix-used and affordable housing neighborhood in the City of Lawrence Gateway Redevelopment District.
- *Mountain View Village*: designed for First Realty Management a project wide planting upgrade for an affordable housing complex in Worcester, MA.

- **Kensington Square Apts. New Haven CT :** Mr. Walsh is currently working with The Community Builders (TCB) on site enhancements to forty-one multi-family units on the western edge of the Yale campus in New Haven, Connecticut. These enhancements include new plantings and decorative fencing along street front and security lighting at all apartments.

Sketches were prepared for all properties showing improvements proposed by Hammer + Walsh Design



Professional Activities

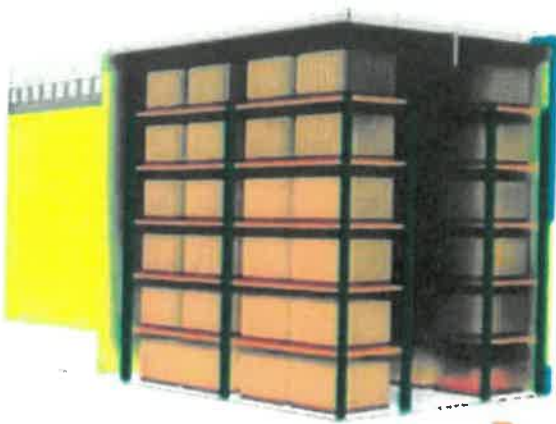
- Registered Landscape Architect, Massachusetts # 753
- Registered Architect, Massachusetts #6328, Michigan #130-10-39950
- Accredited Professional, USGBC LEED®
- Member: The Green Roundtable, Inc.
- Member: Green Roofs for Health Cities, North America, Inc.
- Member: United States Green Building Council (USGBC)
- Entrant, HighLine Competition, New York, NY, 2003
- Panel Participant, Design by Collaboration, Build Boston Convention, 2002

Education

- Master of Landscape Architecture, University of Oregon, 1980
- Bachelor of Architecture, University of Oregon, 1978

CODE CONSULTING

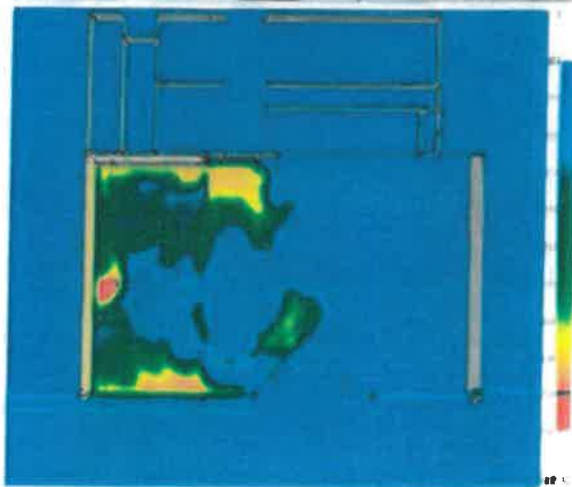
AKF



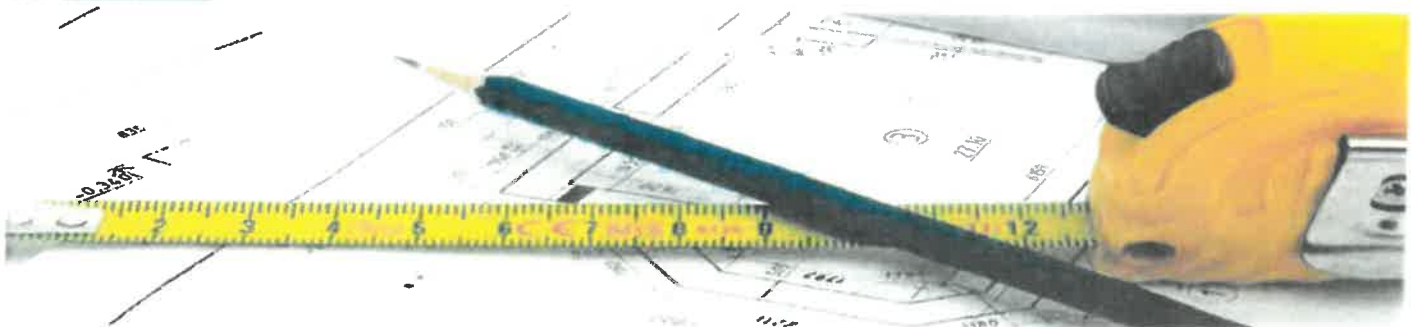
Our code consultants have specialized expertise in the application and interpretation of the International Building Code (IBC) and related codes and standards pertaining to accessibility, sustainability, and fire safety including the NFPA Fire Codes. As a specialty service within a full-service MEP/FP engineering firm, AKF's code consultants also are well versed in codes and standards relevant to mechanical, electrical, plumbing, fire protection, fire alarm, and elevator systems.



Our proposed project team has extensive experience in the evaluation and investigation of code compliance issues in new construction and existing facilities undergoing maintenance and repair activities as well as being modified by alteration, change in use, and addition. Our team members serve as project code consultants to architects and owners during design, permitting, and construction including negotiating code compliance strategies with local authorities having jurisdiction and boards of appeal. Our team members apply this experience as peer reviewers for new construction and existing building projects on behalf of owner's looking for a second opinion or authorities having jurisdiction seeking outside technical assistance.



Clear and consistent communication is crucial to team building and a successful new or existing building study project. Therefore a great deal of our efforts will be focused on providing reliable communication regarding design review assignments with all relevant parties. Providing the design team with reliable and consistent code compliance information during the design, permitting, and construction phases of a project will allow for informed decisions to be made with regard to the available options. AKF prides itself on moving beyond the literal language of the code in presenting the intent of the code and associated exceptions as how local officials and boards of appeal have dealt with similar situations in the past. This insight helps our clients understand their options under the applicable code and available exceptions within the current regulatory environment. AKF's Code Reports are comprehensive and customizable for each building tailored to the existing conditions and proposed scope of work and client's needs. In addition to providing a code report, our typical services include architectural plan review comments documented in written form. These include drawing markups and a plan review comment sheet.





Vernon Woodworth

Code Consultant

BACKGROUND

MS in Theological Studies, Harvard Divinity School |

BA in Urban Design, New College of Florida |

Accreditations: FAIA, LEED AP, Certified Building
Official (ICC) |

Professional Affiliations: BSA, ICC, AIA |

Mr. Woodworth has over 30 years of experience in architecture, code enforcement, and code consulting in a broad range of project sectors. He is a licensed architect in the state of MA and a faculty member at the Boston Architectural College. For over 10 years, Vernon chaired the BSA Codes Committee, seeking to harmonize the MA State Building Code with the national model codes. Elected to serve as the BSA's Commissioner of Civic Engagement in 2011, Vernon is also co-chair of the BSA Committee for the Advancement of Sustainability.

EXPERIENCE



MIT

Massachusetts Institute of Technology (Cambridge, MA)

Rapid Response Capital Renewal Feasibility Study

Hobby Shop Feasibility Study

Buildings 1, 3, 4, 5, 6, & 8 RRFS Study

Mount Ida College (Newton, MA)

Carlson Hall & Shaw Hall

Renovations

Dental Clinic Expansion

Northeastern University (Boston, MA)

Multiple Renovations

165 Cambridge Park Drive (Cambridge, MA)

Code Review

Casco Crossing (Andover, MA)

Master Plan

Jackson Commons (Boston, MA)

Residential Unit Code Review

Woodland Elementary School (Milford, MA)

Code Review

Green Mountain Valley School (Waitsfield, VT)

Racing Performance Center



Northeastern University

PETER T. TIMOTHY

Peter Timothy, President of A.M. Fogarty & Associates, Inc. has been a professional construction cost estimator since 1985. His broad depth of construction experience and comprehensive experience in estimating all construction disciplines with a thorough understanding of construction cost consulting making him a valuable member of any design team.

Mr. Timothy's education includes a Bachelor of Science Degree in Construction Management from the University of Wisconsin - Platteville. He continues his education through extended education programs geared towards business and the construction industry.

Prior to joining A.M. Fogarty in 1989, Mr. Timothy was Chief Estimator at Industrial Associates, a large union interiors contractor. His responsibilities included overseeing all public bidding, administering all filed sub-bids, and coordinating general contract work. He was also responsible for initiating "computerized" estimating as well as tracking actual project cost.

In 1989, Mr. Timothy joined A.M. Fogarty & Associates as senior estimator and replaced Al Fogarty as President in 2000. His experiences include budgeting several large scale restoration projects for the National Park Service in New York and Boston; estimating new commuter rail and light rail stations for the Massachusetts Bay Transit Authority; and work for the Massachusetts Housing and Finance Administration and Housing and Urban Development on many public housing projects.

Mr. Timothy's professional capabilities include estimating all civil, structural, architectural, mechanical and electrical trades. It is with this unique combination of abilities that Mr. Timothy has realized great success in predicting construction cost. It is also through the dedication of comprehensive estimating that his clients find his consulting invaluable in anticipating construction costs.

8.11 General Contractor's Profile

Provide a resume for the General Contractor, including legal name of corporation or partnership; names of partners and/or officers; and year of incorporation or year business started. In addition, all contractor/builders must complete the following Questionnaire and Schedule of Recently Completed Work/Work in Process.

1. Indicate approximate dollar amount of bonding capacity authored in past three years:

\$80,000,000/\$120,000,000

- 2 Name, Address, and Telephone Number of surety company:

Travelers Casualty and Surety Company of America

Alliant Insurance Services, Inc.

131 Oliver St., 4th Floor, Boston, MA 02110 (617) 535-7200

- 3 Indicate insurance company for all risk policy.

Name, Address and Telephone Number:

Travelers Casualty and Surety Company of America

Alliant Insurance Services, Inc.

131 Oliver St., 4th Floor, Boston, MA 02110 (617) 535-7200

- 4 Indicate approximate amount of coverage obtained for last three years.

\$200,000,000

- 5 Is the general contractor under probation or disbarment by any federal or state agency or authority from compliance violations of federal or state regulations or policies concerning equal employment opportunity or prevailing wage regulations?

☐ Yes ☒ No

If yes, describe.

- 6 Is the general contractor a party to any contract that is in litigation or arbitration?

☒ Yes ☐ No

If yes, indicate claimant, project name, approximate amount of claim(s), nature of claim(s) and present status.

J. Karrissey, Needham Bank Addition, \$300,000, contract dispute

In document production

7 Has the general contractor ever failed to complete a project?

☐ Yes ☒ No

If yes, describe.

8 Describe the work customarily performed by the general contractor.

Construction supervision

General carpentry labor and safety

9 Schedule of Contractor's recently completed work and work in process:
See attached

CLIENT		ARCHITECT					SIZE	HUD	LIHTC	HOUS'G	WBE	START
Needham Bank Victor Taylor, Owner's Rep. vtaylor@tpointsolutions.com Turning Point Solutions P.O. Box 389 Trevett, ME 04571 207.633.4436 Mark Whalen, CEO mwhalen@needhambank.com 781.474.5416		Knight, Bagge and Anderson, Inc. John Malnati jmalnati@kbaarchitects.com 6 Thirteenth Street Charlestown, MA 02129 617.241.2807										3/31/2014
Lionhead Apartments LLC % The Abrams Development Co., LLC Martha Abrams-Bell mabramsbell@abramsonline.com Ivan Leslie, Director of Facilities 621 Columbus Avenue Boston, MA 02118 617.424.1300		DMS design, llc Daniel Skolski, Principal daniel@dmsdesign.com 100 Cummings Center, Suite 215C Beverly, MA 01915 978.965.3470					72	X	X		X Yes	7/1/2014
New Mashpee Village, LP % The Community Builders, Inc. Zan Bross, Director of Design & Construction, NE Region zbross@TCBINC.ORG 95 Berkeley Street, Suite 500 Boston, MA 02116 857.221.8646		Winslow Architects, Inc. John A. Winslow john@winslowarchitects.com 89 Massachusetts Avenue Arlington, MA 02474 781.648.6600					145	X	X		X Yes	8/4/2014
Woods Hole FHC LLC c/o Falmouth Housing Corporation Linda Clark, Executive Director lcclark@falmouthhousing.org 704 Main Street Falmouth, MA 02540 508.540.4009		Davis Square Architects, Inc. Cliff Boehmer cboehmer@davissquarearchitects.com 240A Elm Street Somerville, MA 02144 617.628.5700					11		X		X Yes	10/13/2014
Cathedral Church of St. Paul James Woodworth, Director of Facilities 617.785.0123		Donham & Sweeney Architects, Inc. Jeffrey Shaw jshaw@donhamandsweeney.com										5/5/2014

CLIENT		ARCHITECT					SIZE	HUD	LIHTC	HOUS'G	WBE	START
Marlborough Hospital Steven Roach, Pres. & CEO Steve.Roach@umassmemorial.org 157 Union Street Marlborough, MA 01752 508.481.5000		Maugel Architects, Inc. Brent Maugel 200 Ayer Road Harvard, MA 01451 978.456.2800										7/17/2015
Brookline Bank William Patten wpatten@brkl.com 131 Clarendon St. Boston, MA 02116 617.927.7943		Torrey Architecture, Inc. David Torrey david@torreyarchitecture.com 75 Kneeland Street Boston, MA 02111 617.227.1477										5/29/2015
Seamen's Bank John Roderick, President jroderick@seamensbank.com 221 Commercial Street Provincetown, MA 02657 508.487.0035		Brown Lindquist Fenuccio & Raber Architects, Inc. Tom Swensson tswensson@capearchitects.com 203 Willow Street, Suite A Yarmouthport, MA 02675 508.362.8382										3/16/2015
New Boston Ventures David Goldman dgoldman@newbostonventures.com 540 Tremont Street, Suite 8 Boston, MA 02116 617.466.6621		Scott William Grady Architect Scott Grady swgrady@aol.com 1105 Massachusetts Ave., Unit 2E Cambridge, MA 02138 617.620.2420					9			3		4/28/2015
Cromwell Court Preservation Associates Limited Partnership (POAH) Adam Sandore asandore@poah.org 40 Court Street, Suite 700 Boston, MA 02108 617.449.1014		Davis Square Architects, Inc. Eric Chamberlin echamberlin@davissquarearchitects.com 240A Elm Street Somerville, MA 02144 617.628.5700					12		X			5/4/2015
Pediatric Associates of Greater Salem d/b/a 30 Tozer Rd LLC Mark McKenna mwmckenna@comcast.net		Perkins + Will Romeo Moreira romeo.moreira@perkinswill.com 225 Franklin Street, 11th Floor										6/15/2015

FIRM OVERVIEW



History and Market Focus

Since our founding in 1992, we have based our approach to construction management on a few principles that we believe are crucial to deliver incredible client satisfaction: Principal Involvement; Creativity; Teamwork; Open Communication; Knowing our Client. With the involvement of senior management and our open book philosophy, the Delphi Construction management process has delivered challenging projects of all sizes and complexities.

Delphi Construction specializes in construction management for the following market sectors: Healthcare; Assisted & Independent Living; Multi-Family Residential; Affordable Housing; Education; Commercial; Retail & Banking; and Religious. Our success is based on our passion for what we do and our commitment to our clients.

"I highly recommend Delphi Construction for any work you have related to construction adjacent to occupied residences. Delphi showed not only precision in the construction process, but also managed the process in a way that residents and staff were able to continue to live and work in the midst of it all."

*Rev. Herbert Taylor, President and CEO
Deaconess Abundant Life Communities*

Firm Organization

Delphi Construction's organization is based on our long held principle that each project be led by one of our senior managers. We believe this provides our clients with strong leadership, creative problem solving and quick decisions during the day-to-day operations of a project. This, coupled with the experience and strength of our superintendents in the field, provides our clients with the confidence that all challenges will be met with clear and concise solutions.

Every project benefits from our guiding management philosophy - **Building Responsibly™**, where every member of our project team, regardless of their position, takes complete ownership of the project at a personal level, embracing fully the success of your project.

The Senior Management Team

Jake Simmons	CEO
Keith Shaw	COO
Mark Paronich	CFO
Joe Mastromatteo	Vice President

Delphi currently employs 73 full time personnel

Financial Strength

A direct result of our intense focus on client service and senior management involvement is a history of successful clients and projects. Delphi has been profitable in each year of its history by staying focused on exceptional project delivery.

Since 1992, Delphi has successfully completed more than 1,900 projects, ranging in size from \$10,000 to \$76 million. Gross revenues for 2015 were approximately \$64 million. Delphi is bondable up to \$120 million in aggregate and up to \$80 million for a single project. We believe this is a reflection of our focus on the quality of our services not the quantity.

Providing Comprehensive Construction Management
Services Throughout New England since 1992

DELPHI™
CONSTRUCTION INC

**Building
Responsibly.**

FIRM OVERVIEW



BONDING REFERENCE

Alliant Insurance Services, Inc.
John J. Gambino
Construction Services Group
131 Oliver Street, 4th Floor
Boston, MA 02110
617-535-7200

FINANCIAL REFERENCES

Middlesex Savings Bank
Susan Dunnigan
200 Baker Avenue
Concord, MA 01742
978-344-5061

Rockland Trust
John S. Davison
First Vice President
100 Belmont St.
Brockton, MA 02301
781-982-6836

Delphi Construction Services

Delphi Construction, Inc. can assist you at any stage during your planning or construction project. We are a full service construction manager with experience at all phases of the development and construction process. Our comprehensive services include:

Pre-Project Planning

- Due Diligence / Existing Conditions Survey
- End User Meetings & Input
- Building Systems Evaluations
- Master Plan Budgeting
- LEED Evaluation (if Required)
- City or Town Permits / Approvals
- Phase & Logistics Planning

- Cash Flow Analysis
- Develop Project Delivery Options

Preconstruction

- Estimating
- Subcontractor Selection & Qualification
- Interface with Adjacent Departments or Properties
- Final Phase & Logistics including Construction Activities Rules
- Value Engineering / Design Cost Management / Constructability Review
- Subcontractor Bidding / Bid Analysis to Client
- Develop and Finalize Guaranteed Maximum Price and Potential Options

Construction

- Full Time Site Management and Control
- Daily Communication with Client / Staff
- Daily Quality Control & Constructability Review
- Daily Control Budget and Costs
- Daily Co-Management of Occupied Environment Outside Construction
- Final Sign Off of Permits & Certificate of Occupancy

COST TO DATE SUMMARY REPORT

XXXXXXXXXX XXXX

DIVISION	GBP	APPROVED OWNER	REVIEW	SUBCONTRACTOR	REVIEW	PROJECTED	TOTAL	VARIANCE
	BIDSET	CHANGE ORDERS	GBP	CONTRACTS	CHANGE ORDERS	COMMITTED COSTS	COSTS	PROJECTED COST
Silwork	\$ 506,777.00	\$ -	\$ 506,777.00	\$ 331,630.00	\$ 63,850.04	\$ 12,708.20	\$ 98,142.47	\$ 504,418.88
Demolition	\$ 42,570.00	\$ -	\$ 42,570.00	\$ -	\$ -	\$ 32,807.50	\$ 9,762.50	\$ 42,570.00
Concrete	\$ 197,228.00	\$ -	\$ 197,228.00	\$ 184,340.00	\$ -	\$ 187,553.66	\$ 26,976.32	\$ 196,540.00
Masonry	\$ 16,775.00	\$ -	\$ 16,775.00	\$ 16,775.00	\$ -	\$ 16,775.00	\$ 2,500.00	\$ 19,275.00
Steel	\$ 147,507.00	\$ -	\$ 147,507.00	\$ 141,420.00	\$ -	\$ 306.00	\$ 6,184.00	\$ 147,600.00
Carpentry	\$ 802,839.00	\$ -	\$ 802,839.00	\$ 291,078.00	\$ 1,185.00	\$ 351,459.27	\$ 247,241.75	\$ 598,782.12
Roofing	\$ 32,525.00	\$ -	\$ 32,525.00	\$ 34,500.00	\$ -	\$ -	\$ 34,500.00	\$ 975.00
Water/Plumbing	\$ 23,413.00	\$ -	\$ 23,413.00	\$ 21,800.00	\$ -	\$ -	\$ 21,800.00	\$ 1,613.00
Aluminum & Glass	\$ 45,207.00	\$ -	\$ 45,207.00	\$ 35,774.30	\$ -	\$ -	\$ 35,774.30	\$ 9,432.70
Doors & Hardware	\$ 54,901.00	\$ -	\$ 54,901.00	\$ -	\$ -	\$ -	\$ 54,275.00	\$ 626.00
Drywall	\$ 127,963.00	\$ -	\$ 127,963.00	\$ 113,829.38	\$ 8,982.00	\$ -	\$ 122,811.38	\$ 5,151.62
Painting	\$ 10,000.00	\$ -	\$ 10,000.00	\$ 5,010.00	\$ -	\$ -	\$ 5,000.00	\$ 5,010.00
Plumbing	\$ 42,085.00	\$ -	\$ 42,085.00	\$ 38,000.00	\$ -	\$ -	\$ 35,000.00	\$ 7,085.00
Flooring	\$ 86,326.00	\$ -	\$ 86,326.00	\$ -	\$ -	\$ -	\$ 86,326.00	\$ -
Specialties	\$ 8,553.00	\$ -	\$ 8,553.00	\$ 4,889.00	\$ -	\$ -	\$ 4,889.00	\$ 3,664.00
Special Construction	\$ 134,080.00	\$ -	\$ 134,080.00	\$ -	\$ -	\$ 30,318.05	\$ 29,318.05	\$ 134,080.00
Conveying Systems	\$ 83,000.00	\$ -	\$ 83,000.00	\$ 83,000.00	\$ -	\$ -	\$ 83,000.00	\$ -
Plumbing	\$ 64,700.00	\$ -	\$ 64,700.00	\$ 59,000.00	\$ 830.00	\$ -	\$ 59,830.00	\$ 5,900.00
Fire Protection	\$ 62,500.00	\$ -	\$ 62,500.00	\$ 62,500.00	\$ -	\$ -	\$ 62,500.00	\$ -
HVAC	\$ 233,000.00	\$ -	\$ 233,000.00	\$ 204,500.00	\$ 12,500.00	\$ 722.52	\$ 222,722.52	\$ 10,277.48
Electrical	\$ 207,444.00	\$ -	\$ 207,444.00	\$ 184,000.00	\$ 3,800.00	\$ -	\$ 187,800.00	\$ 20,644.00
Subtotal	\$ 2,728,918.00	\$ -	\$ 2,728,918.00	\$ 1,798,428.69	\$ 90,847.04	\$ 148,428.32	\$ 2,035,802.05	\$ 693,115.95
Building Permit	\$ 13,850.00	\$ -	\$ 13,850.00	\$ -	\$ -	\$ -	\$ 13,850.00	\$ -
Subtotal	\$ 2,742,768.00	\$ -	\$ 2,742,768.00	\$ 1,810,078.69	\$ 90,847.04	\$ 148,428.32	\$ 2,049,652.05	\$ 693,115.95
Preconstruction	\$ 10,000.00	\$ -	\$ 10,000.00	\$ 10,000.00	\$ -	\$ -	\$ 10,000.00	\$ -
Subtotal	\$ 2,752,768.00	\$ -	\$ 2,752,768.00	\$ 1,820,078.69	\$ 90,847.04	\$ 148,428.32	\$ 2,059,652.05	\$ 693,115.95
General Requirements	\$ 285,000.00	\$ -	\$ 285,000.00	\$ 285,000.00	\$ -	\$ -	\$ 285,000.00	\$ -
Subtotal	\$ 3,037,768.00	\$ -	\$ 3,037,768.00	\$ 2,105,078.69	\$ 90,847.04	\$ 148,428.32	\$ 2,344,652.05	\$ 693,115.95
Insurance	\$ 30,130.00	\$ -	\$ 30,130.00	\$ 30,130.00	\$ -	\$ -	\$ 30,130.00	\$ -
Subtotal	\$ 3,067,707.00	\$ -	\$ 3,067,707.00	\$ 2,135,215.69	\$ 90,847.04	\$ 148,428.32	\$ 2,374,782.05	\$ 693,115.95
Event	\$ 60,851.00	\$ -	\$ 60,851.00	\$ 60,851.00	\$ -	\$ -	\$ 60,851.00	\$ -
Subtotal	\$ 3,128,558.00	\$ -	\$ 3,128,558.00	\$ 2,196,066.69	\$ 90,847.04	\$ 148,428.32	\$ 2,435,633.05	\$ 693,115.95
Fee	\$ 155,250.00	\$ -	\$ 155,250.00	\$ 155,250.00	\$ -	\$ -	\$ 155,250.00	\$ -
Subtotal	\$ 3,283,808.00	\$ -	\$ 3,283,808.00	\$ 2,351,316.69	\$ 90,847.04	\$ 148,428.32	\$ 2,590,883.05	\$ 693,115.95
Client Contingency	\$ 318,918.00	\$ -	\$ 318,918.00	\$ -	\$ -	\$ -	\$ 265,687.00	\$ 53,231.00
TOTAL	\$ 3,602,726.00	\$ -	\$ 3,602,726.00	\$ 2,351,316.69	\$ 90,847.04	\$ 148,428.32	\$ 2,856,570.05	\$ 746,155.95

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Services Throughout New England since 1992

DELPHITM
CONSTRUCTION INC

**Building
Responsibly.**

FIRM OVERVIEW



Post Construction

- Final Close Out of all Subcontractors
- Commissioning of Systems
- Final Cost and Budget Reconciliation with Savings going to the Client
- Warranty Management

"I have been an Owner's Representative on commercial and institutional projects for over twenty five years. I believe that they have treated my clients fairly and honestly and they have delivered a quality product even when budgets have been very limiting. I highly recommend Delphi Construction."

*William Jackson, President
William Jackson Associates, Inc.*

The Delphi Approach

Delphi Construction's approach to each project includes outlining the client's goals on the project for quality, schedule, cost, phasing, special conditions, and the potential impact to ongoing operations. This information is incorporated into our master plan and will eventually be included as part of our bid packaging to our subcontractors. By planning the project upfront, we can get a market-driven price for all aspects of the project - i.e. we don't add the cost of these conditions after the bid process or once they are encountered in the field. This is our first step in Cost Control / Management philosophy.

Our success is driven by the belief that the client should be an active participant in all project decisions. This philosophy drives our communication both verbally and in writing to keep our clients in touch with daily operations of the project. Our Monthly Project Report includes the same management forms that we use internally. This includes Guaranteed Maximum Price with Details, Projected Project Costs, Schedule, Cash Position, and Status of Contingency. You will always know where your project stands and will be able to make informed decisions based on our *True Open Book* process.

The Delphi Difference

In a market where there are many construction companies to choose from, our clients continue to choose Delphi Construction, Inc. as their construction partner. With 90% of our business coming from repeat clients and word of mouth referrals, our process has a proven track record to deliver superior client satisfaction.

- Customized Approach for Each Client
- Creative Problem Solving
- Adapt to Changing Client Needs
- Intense Management of Daily Operations
- Detailed in our Approach
- Open Book Process
- Managed Outcome

DELPHI APPROACH



Approach to Construction Management

Our approach to each project is based on the principle that *we are always working in the best interests of our clients*. Our preconstruction and construction phase systems are built around an open information framework which we call our “*true open book*” method. This approach provides the project team and the client with all the information necessary to ensure the project’s success.

Beginning in the preconstruction phase, we dissect the entire project to identify your goals and objectives, and review the construction documents repeatedly during their development to ensure that your goals are met. This process enables us to work side by side with the design team to avoid pitfalls in the design that may unnecessarily increase costs. We also identify value engineering options, integrate sustainability and energy efficiency initiatives, flag schedule impact items, and positively affect the overall constructability of the project within your objectives. Our approach is to manage the process continuously, keeping the entire project in focus at all times to ensure its final success.

Phase One: Design Review, Cost Estimating, Schedule Development

During the development of the construction documents, our project management team will review the plans and specifications to provide an overall constructability assessment of the drawings. This is a valuable process to ensure that the project reflects the way the project will be built in the field including critical details at the juncture of walls, floors, ceilings and finish work. Our goal is that the project will not contain design roadblocks, and that design alternatives are presented to the team for review prior to the final construction drawings. ***This will not only save valuable design time and cost, but will save valuable time in the field.***

Along with this review, we develop and update a detailed project budget, including value engineering options, alternate pricing, and other options and budget issues. These budgets are detailed, giving specific line-by-line breakdowns of all work to be performed, including quantities, unit pricing and assumptions. The budget is developed using input from our project managers, superintendents, architects, engineers and the client.

We will also price key items out to our select group of subcontractors and suppliers. Pricing key items with subcontractors and suppliers enables us to validate our unit costs in our estimate and eliminate any items that could impact the budget adversely. We can do this without obligation to any subcontractor or vendor.

In conjunction with the project budget, we can also develop what we refer to as an Owner’s Budget. This supplemental budget contains all construction costs, but also tracks all non-construction expenditures which will impact the overall project cost, such as architect and engineering fees, furnishing costs, equipment costs, technology and other costs not specifically covered within the construction budget. Our clients have found this budget to be valuable in managing their projects because it represents the true cost of their project.

Schedule development is, like our budgets, done on a continuous basis to provide the most accurate schedule structure possible. Every aspect of the work is scheduled in detail, with project milestones and objectives, and long lead items input to create a critical path for the project. Input from the entire project

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team, along with lead times, fabrication, delivery and installation requirements from our subcontractors, are accounted for within the schedule.

Phase 2: Subcontractor Bidding

Delphi's bidding process really starts with the budget development, and grows from there. A subcontractor bid list is developed for the project, and all subcontractors are reviewed and approved by the client prior to formal bidding of the project. As each trade is bid out, Delphi collects the bids and inputs them into our proprietary bid analysis form. The bid analysis enables us to ensure that all subcontractors have accounted for the full scope of work they will be responsible for should they be awarded the work. This comparison and analysis reduces or eliminates change orders and ***provides the client with a market driven total cost for the project.*** No subcontracts will be awarded until the client is satisfied with the completeness of the bid process and signs off on the bid analysis.

During the execution of the work, Delphi vigorously enforces the scope of work for all subcontractors, which is developed from the bid analysis. Only subcontractor change requests that can be clearly shown to be outside the scope of work will be

considered for approval. The project manager reviews all change order requests to remove work covered by the subcontract scope, and to ensure that the additional costs, if any, ***accurately reflect real changes in the scope of work.*** As part of our ***"true open book"*** method, this entire process is transparent and open to review by the client at all times.

The entire process of budgeting, contract negotiations and change order negotiations is part of the project review process and is open to review, analysis and discussion during the regular project team meetings. Our cost reporting process draws a clear and detailed picture of the entire project on a continuous basis and is one of the cornerstones of our ongoing success with our repeat clients.

Phase 3: Construction Management and Administration

During the construction phase of the project, our project manager, construction manager, project controller, administrative staff and financial staff work closely together to ensure the project is built as planned and within budget. The construction manager/superintendent is primarily responsible for all onsite construction activities, including subcontractor management,

interactions with town and regulatory agencies, and feeding information on project progress back to the rest of the team.

The project manager is primarily responsible for overall project execution and maintains the budget, negotiates with subcontractors, interfaces with the client and architect/engineers, provides cost control, and overall execution of the work.

The project controller is responsible for information and data flow including contracts and change orders processing, submittals, requests for information, document tracking and information flow to the subcontractors and vendors.

The financial staff maintains the financial records, handles invoicing, payments, insurance, requisitions and overall financial control and reporting. We utilize the best tools available to perform these tasks, including Microsoft Project®, Microsoft Office®, Sage Timberline®, and a variety of proprietary forms, documents and programs.

This is a general overview of how our team manages the construction process. ***We will develop a detailed, customized and comprehensive program for implementing the construction process that fits each clients' individual needs.***

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MASHPEE VILLAGE II

Mashpee, Massachusetts



Renovated Exteriors of Multi-Family Units

Project Description

This multi-phased, residential renovation project posed a series of challenges.

The interior unit renovations included complete upgrades to all existing kitchens and bathrooms, along with the conversion of seven units to barrier free accessible units. Tenant occupancy of the site was maintained throughout the project. This was complicated by the requirement to construct an entirely new onsite waste treatment facility, in conjunction with extensive site improves, landscaping and exterior building upgrades.

The project also included complete upgrades to all life safety, fire alarm systems and utilities to modernize the entire facility. The work was successfully completed on schedule and on budget, with a high degree of client and tenant satisfaction.

Client:

THE COMMUNITY BUILDERS, INC.
Boston, MA

Architect:

WINSLOW ARCHITECTS, INC.
Arlington, MA

Project Size:

73,880 square feet, 145 units in 16 buildings

Project Type:

Site Improvements and Waste Disposal Facility

Delivery Method:

Construction Management, with Preconstruction Services



Barrier Free Accessible Buildings



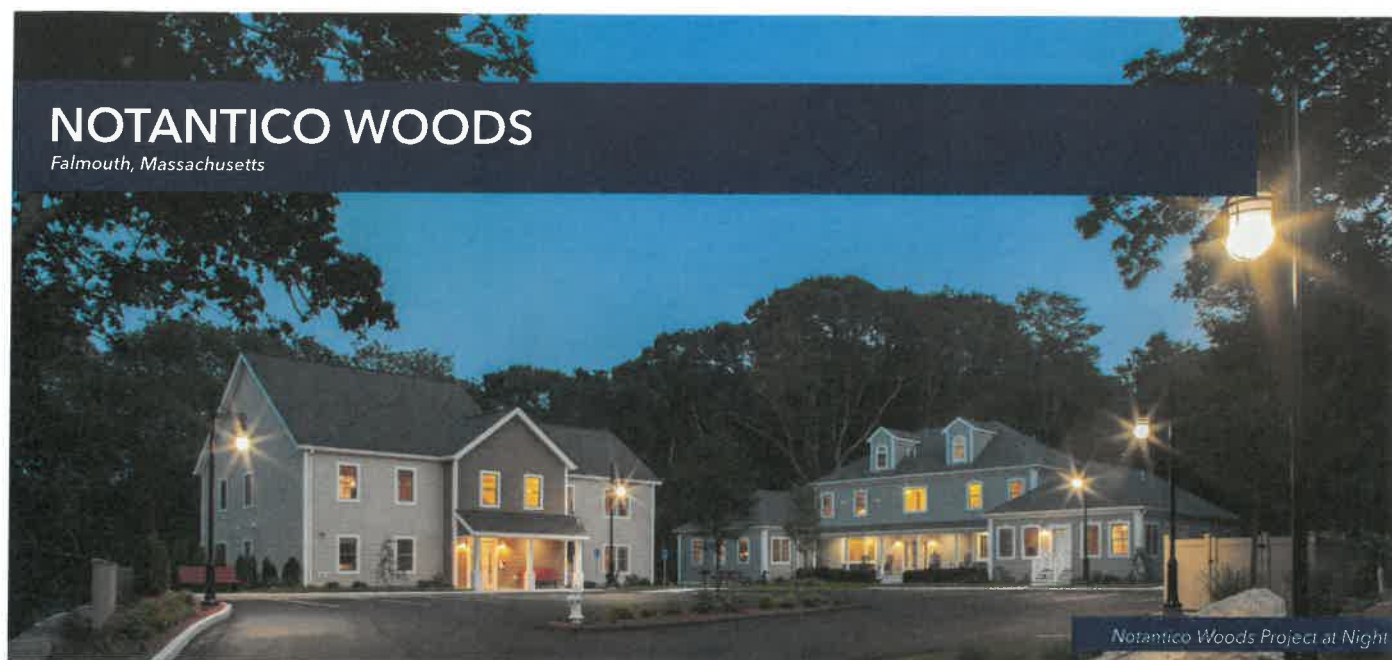
New Wastewater Treatment Facility



Residential Exterior

NOTANTICO WOODS

Falmouth, Massachusetts



Notantico Woods Project at Night

Project Description

Working closely with the client and architectural team starting in the preconstruction phase, Delphi provided key experience and execution of the project to convert a partially completed structure into 11 affordable housing units. The existing building was substantially reworked to provide for six (6) one and two-bedroom apartments. A second, all-new building was constructed to provide five (5) additional units, including a fully accessible unit and a second hearing and visually impaired accommodating unit. In keeping with the client's mission, all units are affordable housing but without compromising the quality of life available for the tenants.

The environmentally sensitive site was carefully reworked to provide for complete on-site waste water and rain water disposal, while protecting the location's ecologically important waterfront environment.

Client:

FALMOUTH HOUSING CORPORATION, Falmouth, MA

Architect:

DAVIS SQUARE ARCHITECTS
Somerville, MA

Project Size:

16,025 square feet, in 11 affordable housing units

Project Type:

Renovation and New Construction of Affordable Housing and Accessible Residential Units

Delivery Method:

Construction Management, with Preconstruction Services



Typical Residential Unit Interior



New 5-Unit Building with Accessible Units



6-Unit Building

ROUTE 134 COMMUNITY HOUSING

Dennis, Massachusetts



New Community Development

Project Description

This project encompassed the redevelopment of an existing site to provide affordable housing in a community setting. The project began within the removal of several old structures, and extensive site development to accommodate the new buildings. Care was taken to ensure that site facilities would treat all waste and drain water on site.

A total of 27 new residential units were constructed, including several barrier free units for handicapped accessibility. The site also includes a dedicate maintenance garage and a community building for the tenants' use.

From the beginning Delphi was involved with the Owner and design team to explore alternatives and value engineering options. This collaborative process ensured that the project was completed within budget and on schedule to meet the client's needs and expectations.

Client:

DENNIS COMMUNITY HOUSING
PRESERVATION ASSOCIATES LLP
Boston, MA

Architect:

BROWN LINDQUIST FENUCCIO &
RABER ARCHITECTS, INC.
Yarmouthport, MA

Project Size:

27 Residential Units, Community
Building totaling 32,240 sq.ft.

Project Type:

New Affordable Housing Development
with Community Center

Delivery Method

Construction Management



New Residential Buildings



Open Concept Floor Plans



New Community Center

ROCK HARBOR VILLAGE RENOVATIONS

Orleans, Massachusetts



Project Description

Having provided POAH with detailed preconstruction services on previous projects, when it came time to address the challenges of the Rock Harbor Village renovation project, POAH chose Delphi Construction to ensure a successful execution and completion of the project.

The renovations to the existing, occupied, 100 unit residential complex, included extensive site work, exterior building improvements, kitchen and bathroom replacements to all units, and conversion of 5 units to full ADA-compliance. Work was also done to remodel the Community Center, including ADA-compliant bathrooms, offices and fully remodeled community room. Delphi successfully integrated the complex phasing requirements inherent in occupied construction, while maintaining full resident satisfaction at all times, and completing the project within the tight 6 month construction schedule.

Client:

PRESERVATION OF AFFORDABLE HOUSING, INC.
Boston, MA

Architect:

DAVIS SQUARE ARCHITECTS, INC.
Somerville, MA

Project Size:

Occupied 100 Residential Units

Project Type:

Interior and Exterior Renovations of Occupied Residential Units

Delivery Method

Construction Management, with Preconstruction Services



KING'S LANDING APARTMENTS RENOVATIONS

Brewster, Massachusetts



New Building Exteriors

Project Description

Kings Landing Apartments is a family housing development in Brewster, MA consisting of 108 units. Building on our previous successes in collaborating with POAH, Delphi was selected to carry the project from preconstruction through final completion.

The project involved upgrading of life safety systems, building code and accessibility improvements, energy upgrades, site upgrades, MEP and select bathroom renovations. These renovations were performed in a challenging occupied environment with minimal impact on tenants, resulting in very high levels of client and tenant satisfaction.

Client:

PRESERVATION OF AFFORDABLE HOUSING, INC.
Boston, MA

Project Type:

Interior and Exterior Remodel of Occupied Residential Units

Architect:

DAVIS SQUARE ARCHITECTS, INC.
Somerville, MA

Delivery Method

Construction Management, with Preconstruction Services

Project Size:

108 occupied residential units



New Building Exteriors



New Apartment Interiors



Community Space Entrance

LEYDEN WOODS

Greenfield, Massachusetts



New Multi-Unit Residence

Project Description

This challenging and extensive project consists of the removal and replacement of 49 residential buildings containing 200 units, with the work performed over 8 interconnecting phases. Each phase involves the replacement of 5 to 6 buildings. As residents were relocated from their existing units, the construction team demolished the entire phase, installed new foundations, new site utilities and infrastructure as well as new, unique, modular buildings. Most buildings contain four units, ranging in size from 1-bedroom flats to 3 bedroom townhouse style units, and several barrier-free accessible suites.

The use of prefabricated modular buildings allowed Delphi Construction to execute an efficient project schedule, coordinating the completion of both interior and exterior work during the same time period, expediting completion and reducing overall project costs.

Client:

THE COMMUNITY BUILDERS, INC.
Boston, MA

Architect:

DAVIS SQUARE ARCHITECTS, INC.
Somerville, MA

Project Size:

209,004 sq.ft. in 200 Residential Units

Project Type:

Removal of existing buildings and construction of 49 new residential buildings totaling 200 units.

Delivery Method

Preconstruction Services with Construction Management



New Residential Court



New Kitchen and Dining Room



Community Laundry Space

INTRODUCTION TO KLEIN HORNIG LLP

Klein Hornig LLP 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 32 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.

WATARU MATSUYASU

✉ wmatsuyasu@kleinhornig.com
☎ 617.224.0622

PRACTICE AREAS

- Real Estate
- Housing Development
- LIHTC Investments
- Co-Ops and Condos
- Lending
- Nonprofit Organizations
- Housing Preservation
- Mixed-Use Development
- MGL 40T Preservation Transactions
- Tenant Purchases / Cooperatives
- General Corporate



EDUCATION

Georgetown University Law Center, JD, 2000
Yale University, BA, 1993

EXPERIENCE

Wataru (Wat) Matsuyasu's practice focuses on real estate, affordable housing, and community development transactions. He has worked with nonprofit and for-profit developers in the acquisition, development and (re)financing of a number of affordable housing and community development projects in Massachusetts. He has also represented a national syndicator in a series of Low-Income Housing Tax Credit transactions around the country. His real estate experience includes real property purchase and sale transactions, zoning and permitting matters, conveyancing, title insurance, leasing, condominiums, and contracting for design and construction services.

Prior to joining Klein Hornig, Wat worked as an associate at DLA Piper and Goulston & Storrs, P.C. in Boston, MA, Baker & Daniels LLP in Indianapolis, IN, and as a project manager with Preservation of Affordable Housing, Inc. (POAH) in Boston, MA.

BAR ADMISSIONS

- Massachusetts
- Indiana (inactive)

TRANSACTIONS

- Represents a national syndicator in numerous Low-Income Housing Tax Credit transactions
- Represents a national tax credit investor in numerous asset management transactions
- Represented a national nonprofit developer in the acquisition, selective demolition, new construction and redevelopment of 173 affordable rental units, along with associated infrastructure development by the City of New Bedford
- Represented a Massachusetts community development corporation in the acquisition of a former mill building complex, subdivision and establishment of a master condominium, and financing of 60 units of affordable rental housing with Low-Income Housing Tax Credits and Historic Rehabilitation Tax Credits
- Represented a community health center in the financing and redevelopment of a former mill building complex, involving formation of a condominium, master lease and sublease, and New Markets Tax Credit and Historic Tax Credit financing
- Represented a Massachusetts community development corporation in the acquisition and preservation (facilitated pursuant to MCL Chapter 40T) of a 32-unit affordable rental housing development
- Represented a local YWCA agency in the financing and rehabilitation of a 103-unit SRO project, involving ground lease and sublease, restructuring of existing debt, and new debt and Historic Tax Credit equity financing
- Represented a Massachusetts community development corporation in the acquisition, development and financing of a three-phase affordable rental housing project, involving the establishment of multiple condominiums and cross-easements
- Represented a local settlement house in the acquisition, redevelopment and Historic Tax Credit financing of a building expanding the agency's services and programming
- Represented a Massachusetts nonprofit developer and operator of affordable SRO units in a series of financing transactions
- Represented a national nonprofit developer in a 140-unit project in Massachusetts involving a ground lease and sublease, refinancing and restructuring of the existing debt, and new debt and equity financing
- Represented a Massachusetts community development corporation in the acquisition, development and financing of 20 affordable homeownership units
- Represented a Massachusetts community development corporation in the acquisition of a former church building and the redevelopment and financing of 34 affordable rental units
- Represented a joint venture of a local nonprofit and national nonprofit developer in the acquisition and refinancing of an 80-unit senior project in Massachusetts

ACTIVITIES

- American Bar Association, *Member*
- Boston Bar Association, *Member*
- The Haley House, Boston, MA, *Board of Trustees* (2007-present)
- Lawyers Clearinghouse on Affordable Housing and Homelessness, *Pro Bono Participant* (2011-present)
- United Way of Massachusetts Bay and Merrimack Valley, Affordable Housing Review Panel (2014)

EVENTS

- Presentation on legal structuring issues to competition participants, Federal Home Loan Bank of Boston (FHLBB), 2012 Affordable Housing Competition – 2012

1.h – Developer’s References

PROPOSER NAME: James J. Perrine, President
Commonwealth Community Developers, LLC

	Project #1	Project #2	Project #3
Project Name	Mashpee Village	Central Grammar	Franklin Park
Location	Mashpee, MA	Gloucester, MA	Boston, MA
Occupancy	Family	Senior	Family
Project Type	Substantial rehab	Substantial rehab	Substantial rehab
Project Manager	Jim Perrine	Jim Perrine	Jim Perrine
Architect	Winslow Architects	Davis Square Architects	Winslow Architects
Contractor	Delphi Construction	Castagna Construction	CWC Builders
Number of Units	145	80	224
Financing and Rental Assistance	MassHousing mortgage loans, tax exempt bonds, 4% low income housing tax credits, state Community Based Housing funds, Massachusetts Rental Voucher Program	MassHousing mortgage loans, tax exempt bonds, 4% low income housing tax credits, state and federal historic credits, state Capital Improvement and Preservation Funds, Gloucester Community Preservation Act funds and Affordable Housing Trust funds	MassHousing taxable conduit loans, AFL-CIO Pension Trust equity, 9% low income housing tax credits, state weatherization funds, Lead-Free Boston funds, enhanced Section 8 Project Based Vouchers
Type of Construction	Wood frame	Brick	Brick; wood frame
Sale or Rental	Rental	Rental	Rental
Total Development Cost	\$19,525,000	\$18,993,000	\$35,589,000
Start Date	2014	2011	2010
Projected Completion	2015	2012	2011
Date of Completion	2015	2012	2011
Reference: Name and Phone	Scott Ployer 617-293-6650	Kirk Noyes 978-281-1211	Mecky Adnani 646-336-4931

2 – Development Concept

a. Number and Size of Units:

Studios	2
One bedrooms	40
Two-bedrooms	<u>8</u>
TOTAL	50

We are proposing two studios, which have lowest rents. There will be eight two-bedrooms, which are suitable for individuals or couples with another family member (often a disabled adult child) living in the household, residents who may require a live-in caregiver, or couples desiring a larger unit. The remainder will be one-bedroom units, the most common configuration in senior housing.

b. Affordability:

30% of AMI:*	5 units
50% of AMI:	3 units
60% of AMI:	42 units

* AMI refers to the Area Median Income; a chart appears below:

Area Median Income by Household Size for Westminster, MA (Fitchburg-Leominster, MA HUD Metro FMR Area)				
Household Size	30% AMI	50% AMI	60% AMI	80% AMI
1	16,950	28,250	33,900	45,200
2	19,380	32,300	38,760	51,680
3	21,810	36,350	43,620	58,160
4	24,210	40,350	48,420	64,560

We will be seeking federal and state low income housing tax credits. In order to obtain the maximum number of credits, which will yield the maximum amount of private equity investment, all units must be restricted to households with incomes that don't exceed 60% of AMI, adjusted for household size. Further, the Commonwealth's Department of Housing and Community Development (DHCD), which allocates the federal and state credits, requires that at least 10% of the units be restricted to households with incomes no greater than 30% of AMI. And we will be requesting state Community Based Housing funding for three units, which would require them to be income-restricted at 50% of AMI.

The major tax law passed late last year provided that some apartments could be rented to households with incomes up to 80% of AMI, provided that the average of the household incomes was no greater than 60% of AMI. Since we have eight units restricted at levels lower than 60% of AMI, we might have the possibility of switching some of the 60% AMI units to 80% of AMI. DHCD has not yet issued any guidance on how and whether they might permit such income averaging, which we would need before considering a change.

c. Design Concept

For Westminster Senior Housing, CCD and WAI determined that 50 units of housing on the site would be feasible but would require a building type that is larger than the buildings in the surrounding area. We did not feel that 50 units could be located on one floor – nor did we feel that this would be desirable. We also felt that providing several smaller buildings scattered around the site would not be desirable as it would use up far too much of the site to do so.

Accordingly, the design challenge was one of scale – how to break down the massing of a larger building into smaller increments that are more reflective of the single-family nature of the surrounding area.

After reviewing several different approaches to site planning and building design, we concluded that the preferable and most economically feasible approach would be to provide what is in effect a 2- and a 3-story building with connecting elevator service for full accessibility.

The site design incorporates the following features:

- 60 parking spaces (1.2/unit)
- Taking advantage of the topography by locating parking underneath one wing of the building – providing 25 covered parking spaces with direct access to the entry vestibule and saving open green spaces around the building.
- Entry rotary with handicap and guest parking as well as provision for convenient resident drop-off.
- Community commons area on grade.
- Landscape buffer – with combination of large bushes and trees between the new housing and the Westminster Senior Center.
- Landscape buffer between the proposed parking lot and property line on the western boundary.
- Provision for walking/exercise trails around the perimeter of the Senior Center and the development and connecting directly to the two facilities.

The building design incorporates the following features:

- 2 & 3 story building designed to fit into the rising topographic grades
- 50 units – 2 studios, 40 1BR units, 8 2 BR units.
- Provision for large storage room within each unit (provision for storage is an overlooked problem with affordable housing).

- Elevator access to all floors.
- Energy efficient “Green roof” on one or both wings of the building
- Provision for a stone pediment base façade for the building to integrate it more closely into the landscape.
- Community garden/commons roof terrace on one of the building wings.

To further break down the massing and scale of the building, we propose to use a variety of siding types and material most typical of New England and the surround area – such as 2 different widths of clapboard siding, paneling, bays and gables.

We will continue to explore the building elevations and its relationship to the site. We would like to work with the Town and community to provide a shape and palette of materials that feels most appropriate for this site and hope that we are provided that opportunity.

The units are spacious and sun-filled. Residents will enjoy fully-applianced kitchens and ample closet space including a large storage closet. There will be common laundry facilities on each floors and there is a small community room/lounge for residents. The management office is on the first floor.

The buildings are designed to be highly-efficient in use of energy and water. Walls and attics will be heavily insulated. Advanced air sealing methods will be used to conserve heat in winter and keep out hot air in summer. Energy star qualified windows, appliances and lighting fixtures will be installed. High efficiency (95%) condensing boilers will provide heat and hot water to each apartment home. Additional energy-saving features include rooftop solar panels, energy-recovery ventilation and pressure-sensitive controls on hot water pumps, all as recommended by our energy consultant. Water conserving plumbing fixtures will be used, including 1.28 gpf toilets, 2.0 gpm shower heads and kitchen faucets and 1.5 gpm bathroom faucets. A green roof will reduce the impact of solar heat in the summer and minimize heat loss in the winter; in addition, it will minimize stormwater runoff. Residents will be able to access the green roof directly from the third floor. Such greenery offers relaxation, reduces stress and promotes healing for residents returning from the hospital, and others who may not be up to using the walking and exercise trails.

The site and building design are shown on plans prepared for this development, as follows:

1. T-1	TITLE SHEET
2. C-1.01	SITE PLAN @ 1/40
3. C-1.02	SITE PLAN @ 1/20
4. A-1.01	1 ST FLOOR PLAN @ 1/8 and UNIT PLANS @ 1/4
5. A-1.02	2 ND & 3 RD FLOOR PLANS @ 1/8
6. A-1.03	BUILDING ELEVATIONS @ 1/8
7. A-1.04	BUILDING/SITE RENDERINGS

The plans are in section 3.

d. Construction Staging and Impacts

A more formal construction staging plan will be devised as part of the design development process in collaboration with the contractor, and after consultation with staff at the Senior Center and the Town's Highway Department. The key elements are as follows:

- We will meet with Senior Center staff and neighbors to determine their needs and concerns.
- The contact person will be CCD's Construction Manager. He or she will check in with the neighbors and the Senior Center every few weeks and will be reachable by cell phone in case they have any concerns.
- Work will be done between the hours of 7:00 AM and 4:00 PM, Monday through Friday, with the possibility of occasional work on Saturdays between 8:00 AM and 4:00 PM.
- The Construction Manager will notify neighbors and the Senior Center in advance of unusually high noise-generating activities.
- The contractor will use noise-reduction technologies or process modifications to minimize construction noise.
- Erosion and sediment control (hay bales, silt fences, fiber logs, erosion control blankets, riprap, temporary seeding, ground cover plantings and the like) will be installed before work begins and periodically checked and supplemented as work progresses.
- For the initial phase of ground clearing and earthwork, when there are relatively few workers on site, we anticipate requesting to use a portion of the unpaved lot at the Senior Center for parking for construction worker vehicles and earth moving equipment. This will continue as the land is cleared for the roadways, the parking lot and the building.
- Mature trees will be identified on a plan and every effort will be made to minimize the number of them having to be removed.
- Temporary electric service will be brought in to power the construction trailer.
- Once the site's parking lot has been cleared and graded, that area will be used for the trailer, material storage, and parking for workers and equipment. This use will help keep noise away from the abutter on the southeast side.
- The road in from West Main Street will be cleaned with a power sweeper every Friday (subject to Highway Department approval), or more often as needed.
- We anticipate bringing underground utilities in from West Main Street, on the portion of the site that is southeast of the newly-designated street, to minimize the

- need for excavating the street.
- Necessary street excavation will be scheduled well in advance with the Highway Department, and the Department's requirements and guidelines will be followed. Appropriate signage, traffic cones or barrels and police details will be set up in advance. Excavation will be completed as quickly as possible to minimize traffic impact. Steel plates will cover any openings left at the end of the workday.
- Pedestrian mobility and safety will be maintained in the event of any sidewalk closures.

e. Project Financing

For Jim Perrine's extensive experience obtaining financing for affordable developments, please see page 2 of section 1.b. About a dozen of the projects listed in the Prior Development Experience chart in section 1.c involved financing of the type expected to be utilized for the proposed Westminster Senior Residences.

The pro forma at the end of this narrative includes the following sections:

- Building Program
- Development Budget
- Sources and Uses of Funds
- Unit Mix and Rent
- Operating Income and Expenses
- 15-year Cash Flow Projection

The Sources and Uses of Funds shows the following sources:

Source	Amount
Conventional bank permanent mortgage	\$935,000
Contribution of value of leasehold by Town of Westminster	\$400,000
State Affordable Housing Trust Fund	\$1,000,000
State-administered federal HOME funds	\$200,000
State Community Based Housing funds	\$225,000

Deferred developer fee	\$ 398,686
Equity from federal Low Income Housing Tax Credit (LIHTC) investor	\$8,279,172
Equity from state Low Income Housing Tax Credit (LIHTC) investor	\$2,520,000
General Partner nominal equity contribution	\$100
Total Sources	\$13,957,958

In addition, there would be a construction loan of \$7,030,000 that would be repaid with the greater portion of investor equity that would come into the project toward the end of construction.

The conventional bank permanent mortgage loan and the construction loan are based on the letter of intent from Boston Private Bank included with this section. Interest rates and terms are typical for that bank and are attractive in the marketplace. The permanent mortgage was calculated to maintain a debt service coverage ratio (net operating income divided by mortgage payments) of no less than 1.20 through year 15 (which is the end of the tax credit compliance period – but by no means the end of affordability).

The value of the Town's contribution of the leasehold is estimated and would have to be established by appraisal. It also shows up as an expense on the Development Budget, so if the amount were changed as a result of the appraisal it would not affect the bottom line. It is important, however, to be able to demonstrate a significant Town contribution toward the project – it is a requirement for the 9% tax credits we will be requesting, and the greater it is the better.

The State's Affordable Housing Trust Fund and HOME funds are soft mortgage loans, requiring no payments during the life of the loan. The Community Based Housing is also such a soft loan, but it comes with a requirement to rent three units to the disabled.

The Deferred portion of Developer's Fee would be paid from cash flow (if any).

The equity from the federal and state low income housing tax credit investors is based on current, competitive credit pricing from R4 Capital, LLC, an active syndicator of LIHTC investments. See letter of intent included with this section.

Total Sources of Funds equal Total Uses.

DHCD generally holds one funding round per year for the tax credits and state funding it has available, and they are very competitive. A pre-application will be due around November 30, with the full application (a major undertaking!) due in mid-February. DHCD requires that zoning be in place by the time the pre-application is due. It seems unlikely that the process of selecting a developer, finalizing a Development Agreement,

completing the community process and obtaining the municipal approvals up to and including the Special Permit from the Planning Board could be completed by November 30, 2018. Accordingly, we expect that the applications would have to be submitted in the next funding round, a year later. With a pre-application filed in November 2019 and a full application in February 2020, awards should be announced in late July or early August, 2020. It is common that a project may have to apply more than once, which would mean a further delay of a year or even two. Once the state funding award is in hand, it usually takes four to six months to close the transaction and begin construction.

We will also seek five Section 8 project-based vouchers to support the residents of the units income-restricted at 30% of AMI and three Section 811 project-based vouchers for the disabled to support the residents of the Community Based Housing units restricted at 50% of AMI.

Commonwealth Community Developers

Westminster Senior Residences

Development Budget

	Budget		Tax Treatment of Assets				Non-Depreciable
	Total	per unit	Depreciable	Amortized	Expensed	Land	
Land Acquisition	400,000	8,000	-	-	-	400,000	
Total Acquisition	400,000	8,000	-	-	-	400,000	
Site Work	1,000,000	20,000	900,000	-	-	100,000	
Building Demolition	-	-	-	-	-	-	
Construction - Res Building	6,940,729	138,815	6,940,729	-	-	-	
Owner's Construction Contingency	930,041	18,601	930,041	-	-	-	
Total Hard Costs	10,230,456	204,609	10,030,456	-	100,000	100,000	
Architect-Design	360,000	7,200	360,000	-	-	-	
Architect-Supervision	115,000	2,300	115,000	-	-	-	
Architect-Reimbursables	10,000	200	10,000	-	-	-	
Construction Management	75,000	1,500	75,000	-	-	-	
Engineering Fees	115,000	2,300	115,000	-	-	-	
Environmental Audit/Testing	6,000	120	4,500	-	-	1,500	
Surveys	22,000	440	17,600	-	-	4,400	
Legal 1	150,000	3,000	135,000	15,000	0	-	
Title & Recording	14,000	280	11,200	-	-	2,800	
Audit & Cost Certification	30,000	600	30,000	-	-	-	
Appraisal	5,000	100	5,000	-	-	-	
Market Study	6,000	120	6,000	-	-	-	
Insurance during development	60,000	1,200	60,000	-	-	-	
Security during development	5,000	100	5,000	-	-	-	
Furniture & Equipment	25,000	500	-	-	15,000	-	
Rent-up & Marketing	25,000	500	-	-	25,000	-	
Soft Cost Contingency	57,370	1,147	51,633	5,737	-	-	
Total Soft Costs	1,204,773	24,095	1,095,336	50,737	40,000	8,700	
Syndication Fees	-	-	-	-	-	-	
Perm Loan-Direct Costs	-	-	-	-	-	-	
Perm Loan-Orig. Fees	-	-	-	-	-	-	
Const to perm-Direct Costs	10,000	200	10,000	-	-	-	
Const Loan-Direct Costs	25,000	500	18,500	-	6,500	-	
Const Loan-Orig. Fees	35,150	703	26,011	-	9,139	-	
Const Loan-Interest	181,000	3,620	133,940	-	47,060	-	
Lender & Investor Inspections	15,000	300	15,000	-	-	-	
Financing Contingency	23,847	477	-	-	-	-	23,847
Total Financing Costs	496,509	9,930	247,904	97,500	77,259	-	73,847
Operating Reserve	213,046	4,261	-	-	-	-	213,046
Construction Reserve	264,854	5,297	-	-	-	-	264,854
Total Reserves	213,046	4,261	-	-	-	-	213,046
Paid Developer Fee	1,014,488	20,290	1,014,488	-	-	-	
Deferred Developer Fee	398,686	7,974	398,686	-	-	-	
Total Developer Fee	1,413,174	28,263	1,413,174	-	-	-	
Total	13,957,958	279,159	12,786,870	148,237	-	508,700	286,894

Commonwealth Community Developers

Westminster Senior Residences

Sources and Uses

		Total	p/u (50)					
Sources								
Hard Debt				Rate	Fees	MIP	Term	An
Taxable Perm	935,000	18,700		5.66%	0.00%	0.00%	17	
{Second Mort}	-	-		0.00%	-	-	-	
{Third Mort}	-	-		0.00%	-	-	-	
Hard Debt Subtotal	935,000	18,700						
Soft Debt				Rate	Term	%CF	CF order	Cpnd
Town of Westminster-lan	400,000	8,000		0.00%	999	-	4	
State AHTF	1,000,000	20,000		2.95%	40	17%	1	
HOME	200,000	4,000		2.95%	40	-	2	
CBH	225,000	4,500		2.95%	40	-	3	
{Soft 5}	-	-		2.95%	40	5%	5	
{Soft 6}	-	-		2.95%	40	5%	6	
{Soft 7}	-	-		2.95%	40	5%	7	
{Soft 8}	-	-		2.95%	40	5%	8	
{Soft 9}	-	-		2.95%	40	5%	9	
Accrued Soft Interest	-	-		2.95%	40	5%	10	
Deferred Dev Fee	398,686	7,974		2.95%	40	100%		
Soft Debt Subtotal	2,223,686	44,474						
Equity				Annual Credit	Years of Credit	Total Credit to LP	Price/\$	LP Sha
Fed LIHTC	8,279,172	165,583		900,000	10	8,999,100	0.9200	99.9%
Fed HTC	-	-		-	1	-	-	99.9%
State LIHTC	2,520,000	50,400		700,000	5	3,500,000	0.7200	100.0%
State HTC	-	-		-	1	-	-	100.0%
Investor equity	-	-		-	-	-	-	
{Other Equity}	-	-		-	-	-	-	
{Other Equity}	-	-		-	-	-	-	
GP Contribution	100	2						
Equity Subtotal	10,799,272	215,985						
Grants/Other								
FHLBB AHP Grant	-	-						
{Grant 2}	-	-						
{Grant 3}	-	-						
{Grant 4}	-	-						
{Grant 5}	-	-						
{Grant 6}	-	-						
Grants/Other Subtotal	-	-						
Total Sources	13,957,958	279,159						
Uses								
acquisition	400,000	8,000						
site work	1,000,000	20,000						
construction	9,230,456	184,609						
soft costs	1,204,773	24,095						
financing costs	496,509	9,930						
reserves	212,246	4,245						

f. Lender Letters of Interest

We have attached letters of interest from:

- Boston Private Bank, covering the construction-to-permanent mortgage loan (\$935,000) and the construction loan (\$7,030,000) for a total of approximately \$7.96 million, and
- R4 Capital, covering the LIHTC equity: federal \$8,279,172 and state \$2,520,000.

BOSTON PRIVATE

▫ COMMUNITY INVESTMENT ▫

August 10, 2018

Mr. James J. Perrine
Commonwealth Community Developers
1588 Cambridge Street
Cambridge, MA 02138

Via Email

RE: Westminster Senior Residences

Dear Mr. Perrine:

Boston Private is pleased to offer this strong letter of interest to provide financing for construction and permanent financing (collectively, the “Loan”) to assist in the development of the “Westminster Senior Residences” project in Westminster, MA (the “Project”). The project will make available badly-needed senior affordable housing in Westminster.

We understand that the Project involves construction and permanent financing for a 50-unit affordable housing development for seniors. The building will be highly energy-efficient, with geothermal heating and cooling and solar panels to reduce utility costs. Each unit will have a balcony or patio and an ample storage closet within the unit. Accessible walking trails will be created in the natural space around the property. Residents will benefit from the availability of a small community room, in addition to the Town’s Senior Center adjacent to the site.

We understand that the Project involves short-term first mortgage financing totaling approximately \$7.96 million to support the construction activity, and that this financing will be paid down to approximately \$935,000.00 at “conversion” of the financing, based on the pay-in of equity associated with the Low Income Housing Tax Credits.

We would be eager to provide this financing according to terms which are typical for this type of transaction, which would involve a short term (approximately 24-month) monthly floating interest rate for the construction period, and a long term, forward-locked fixed rate for the smaller permanent loan. A typical amortization for the long term residential unit financing would be 30 years. Other terms and conditions typical for similar transactions would apply.

We would be delighted to work with you and your team on this initiative. Since 2000, Boston Private has made over \$2 billion in Community Reinvestment Act-eligible financing available to the communities we serve. Our Boston office has earned an “Outstanding” CRA rating from the FDIC every year since 2000. We are proud to be one of the most active lenders to community development transactions in Eastern Massachusetts – financing many of the area’s best-known for-profit and non-profit

developers and working with a wide range of investors, including RBC, MHIC, Bank of America, Michel Associates and others.

This financing is well within our standard financing programs, and we would immediately pursue the underwriting and due diligence for this financing upon your receipt of subsidy and tax credit commitments as indicated in your pro formas. Please be aware that this is not a commitment of funds, and that any commitment is fully conditioned upon further due diligence and review and approval of the Bank's Loan Committees.

We would be delighted to work with you to provide badly-needed affordable senior housing in Westminster. Please feel free to contact me at 617-912-3701 with any questions. Thank you for the opportunity.

Sincerely yours,

A handwritten signature in dark ink, appearing to read "P. Hollands", written in a cursive style.

Peter Hollands
Senior Vice President

cc: Howard Tarlow, Boston Private
Esther Schlorholtz, Boston Private



August 10, 2018

Commonwealth Community Developers, LLC
Attn: James J. Perrine
1588 Cambridge Street
Cambridge, MA 02138

RE: WESTMINSTER SENIOR RESIDENCES, WESTMINSTER, MA (the "Project")

Dear James:

This letter (this "Letter") expresses the intent of and summarizes the terms and conditions pursuant to which R4 Capital LLC or one of its affiliates (the "Limited Partner") will purchase a limited partnership interest in a to-be formed Massachusetts limited partnership (the "Partnership"). The General Partner agrees and acknowledges that all information provided herein shall be true, correct and complete in all material respects.

1. Project Structure.

The Partnership has been formed to acquire, own, develop, and operate the Project, which is anticipated to be eligible to claim Low-Income Housing Tax Credits ("Federal Housing Credits") under Section 42 of the U.S. Internal Revenue Code (the "Code") and Massachusetts State Low-Income Housing Tax Credits ("State Housing Credits", and together with the Federal Housing Credits, the "Credits"). The Partnership anticipates receiving a reservation (the "Allocation") of Credits from the Massachusetts Department of Housing and Community Development (the "Credit Agency").

The key parties involved in the Partnership shall be:

	Party	Name	Ownership Interest in the Partnership
1	The Partnership	To-be-formed entity	N/A
2	Limited Partner	An affiliate of R4 Capital LLC	99.99%
3	General Partner	To-be-formed entity	.01%

Neither the General Partner nor any person related to the General Partner may hold any debt owed by the Partnership or allow any permanent debt to be recourse, if such debt was used to finance any items included in the Partnership's Eligible Basis, including the Deferred Developer Fee.

2. Other Project Parties.

- A. Developer. Commonwealth Community Developers, LLC or an affiliated entity to-be-determined.
- B. Guarantors. To-be-determined individuals, corporate entities or other parties acceptable to the Limited Partner. The obligations of the General Partner set forth in the Partnership Agreement, including but not limited to those described herein, shall be guaranteed by the Guarantor(s). The Guarantors will be required to exhibit minimum liquidity and net worth of \$1 million and \$5 million, respectively.

C. Property Manager. Commonwealth Community Developers, LLC.

D. General Contractor. To-be-determined. The General Partner shall obtain a fixed-price contract for the construction of the Project on terms and conditions and with a general contractor acceptable to the Limited Partner, which contract shall provide for a 100% payment and performance bond or letter of credit for not less than 15% of the fixed-price construction contract amount from a banking institution acceptable to the Limited Partner. A minimum of a 5% total construction cost contingency is required (unless a higher amount is required by the Limited Partner after underwriting the Project). It is expected that the construction contingency amount will be outside of the construction contract.

The qualifications and financial condition of each of the foregoing parties must be acceptable to the Limited Partner.

3. Unit Matrix and Project Schedule.

A. Unit Matrix. The Project will consist of 50 units. Of the 50 units, eight units will be subject to a 20-year Housing Assistance Payment Contract ("**HAP**") which will be in place prior to Admission of the Limited Partner to the Partnership. It is expected that all of the units will qualify for Housing Credits under Section 42 of the Code, all applicable state and federal regulations and the Allocation. The following will be the unit mix and income restrictions of the units:

Unit Type	Number of Units	Income Restrictions
Efficiency	1	30% AMI / HAP
Efficiency	1	60% AMI
1 Bedroom	2	30% AMI / HAP
1 Bedroom	3	50% AMI / HAP
1 Bedroom	35	60% AMI
2 Bedroom	2	30% AMI / HAP
2 Bedroom	6	60% AMI

B. Project Schedule. The construction/lease-up schedule expected for the Project and upon which the credit pricing and deal terms contained herein are calculated is as follows:

Closing Date	Anticipated December 1, 2019
Completion Date	12 months after Closing Date, anticipated December 1, 2020
Last Unit Leased	14 months after Closing Date; anticipated February 1, 2021

4. Tax Credits. The annual amount of Federal Housing Credits under the Allocation is \$900,000 of which \$899,910 will be allocated to the Limited Partner ("**Limited Partner Credit Share**") and the annual amount of Massachusetts State Housing in the amount of \$700,000, all of which will be allocated to the Limited Partner ("**Limited Partner State Credit Share**"). The amount of Credits for which the Project will qualify is based on

an Eligible Basis of \$11,756,870 ("**Eligible Basis**"), a Qualified Basis of \$11,756,870 ("**Qualified Basis**"), and an applicable percentage of 9.0% ("**Applicable Percentage**");

The following sets forth the delivery of Federal Housing Credits that the Project and the Limited Partner will claim:

Year	Project's Credits	Limited Partner Credit Share
2021	\$810,000	\$809,919
2022 - 2030	\$900,000	\$899,910
2031	\$90,000	\$89,991

The following sets forth the delivery of State Housing Credits that the Project and Limited Partner will claim:

Year	Project's State Housing Credits	Limited Partner State Credit Share
2021	\$630,000	\$630,000
2022 - 2025	\$700,000	\$700,000
2026	\$70,000	\$70,000

The pricing provided for in this Letter is, in part, based on the credit delivery set forth above. Any delay in such credit delivery will cause a decrease in the price per credit being paid by the Limited Partner.

1. **Capital Contributions.** Based on the information set forth herein and the materials you previously submitted, and subject to the Limited Partner's satisfactory completion of due diligence (in its sole discretion), the Limited Partner will make aggregate capital contributions (the "**Capital Contributions**") to the Partnership (subject to adjustment as provided below) for the Federal Housing Credits of \$8,279,172 based on a contribution amount of \$0.92 per dollar of Limited Partner Credit Share, and \$2,520,000 for the State Housing Credits based on a contribution amount of \$0.72 per dollar of Limited Partner State Credit Share, in five (5) installments according to the following schedule:

		Amount of Capital Contribution (Federal Housing Credit) (\$)	Amount of Capital Contribution (State Housing Credit) (\$)	% of Total Capital Contribution
1	Admission of the Limited Partner to the Partnership	\$1,241,876	\$378,000	15%
2	Latest of (i) 100% Construction Completion, (ii) twelve months after Payment 1, or (iii) December 1, 2020	\$2,069,793	\$630,000	25%
3	Latest of (i) Receipt of the Cost Certification from the Project's Accountant, (ii) one month after Payment 2, or (iii) January 1, 2021	\$2,483,752	\$756,000	30%
4	Latest of (i) Rental Achievement, (ii) four months after Payment 3, or (iii) May 1, 2021	\$1,407,459	\$428,400	17%
5	Latest of (i) Receipt of IRS Form 8609(s), (ii) one month after Payment 4, or (iii) June 1, 2021	\$1,076,292	\$327,600	13%

The following are definitions for the terms set forth above in the Capital Contribution schedule. All construction completion thresholds prior to 100% Construction Completion will be based on submissions of AIA forms G702/703 and an inspection by the Limited Partner's engineering consultant ("**Limited Partner Consultant**") and/or the Limited Partner's asset management group as to the progress of the Project, approving the construction and certifying that the work performed to meet such threshold has been permanently made a part of the Project.

- A. **100% Construction Completion.** 100% Construction Completion will be deemed to have occurred when (i) the Limited Partner has received a certificate from the Project architect and Limited Partner Consultant that the Project has been completed substantially in accordance with the final plans and specifications (the "**Plans**") approved by the Limited Partner, (ii) the Project has received a final certificate of occupancy (or its equivalent) permitting occupancy of the entire Project for its intended use, and (iii) the Limited Partner has received a draft certificate from the Project's independent accountant(s) setting forth the initial estimate of the Project's Eligible Basis for Credit purposes, and the amount of annual Credits to which the Partnership is entitled, and that the amount of Bonds financing the Project as of the date the Project was placed-in-service was greater than 50% of the Project's basis in the land and building(s)
- B. **Rental Achievement.** Rental Achievement will be deemed to have occurred when (i) all of the Project's permanent financing has closed (or will close simultaneously with payment of the Rental Achievement Capital Contribution), (ii) all of the set-aside apartments in the Project have qualified for Credits, (iii) the Project has maintained a physical occupancy rate of at least 93.3% and a debt service coverage ratio of at least 1.15 to 1.00 (assuming a 6.7% vacancy factor based on the greater of actual or underwritten assumptions) for three (3) consecutive months, and (iv) the Limited Partner has received a certificate from the Project's independent accountant(s) stating the amount of the first year Credits, Eligible Basis, Qualified Basis, Applicable Percentage, the amount of annual Credits to which the Project is entitled, and the Limited Partner Credit Share.

2. Developer Fee. The Developer shall be entitled to a total development fee (the “**Developer Fee**”) in the amount permitted by the Credit Agency and agreed to by the Limited Partner. It is anticipated that a portion of the Developer Fee (the “**Cash Developer Fee**”) will be paid from the Limited Partner’s Capital Contributions (and any other mutually agreed upon sources) in installments mutually agreeable to the Partnership’s partners, provided that the payment of the Developer Fee is subordinate to the payment of all of the Partnership’s obligations to third parties and deposits into the Replacement Reserve and the Operating Reserve. To the extent the Developer Fee has not been paid in full upon the funding of the Receipt of IRS Form 8609(s) Capital Contribution, the remainder of the Developer Fee (the “**Deferred Developer Fee**”), together with interest at 6.00% per annum, will be paid out of Cash Flow as provided below. To the extent the Deferred Developer Fee is not paid by the end of the thirteenth year of the fifteen-year compliance period, the General Partner shall be obligated to contribute to the Partnership an amount equal to the unpaid Deferred Developer Fee, which obligation shall be guaranteed by the Guarantor(s).
3. Reserves. The Partnership will fund the following reserves:
 - A. Replacement Reserve. The Partnership will fund out of Cash Flow a replacement reserve (the “**Replacement Reserve**”) in the amount equal to the greater of (i) \$300 per unit per year, to be increased by 3% annually, unless the Limited Partner’s plan and cost review indicates a higher amount is required, or (ii) such amount as determined necessary by the Limited Partner upon regular reviews of the physical needs and financial circumstances of the Project.
 - B. Operating Reserve. An operating reserve (the “**Operating Reserve**”) in the amount of \$213,046, or an amount equal to six months of operating expenses, replacement reserve deposits and debt service will be funded at Rental Achievement. The Operating Reserve will be replenished up to \$213,046 (the “**Minimum Balance**”) from Cash Flow to the extent withdrawals are made. No withdrawals may be made from the Operating Reserve (i) until Rental Achievement, (ii) while the Project is maintaining at least break-even operations or (iii) until the maximum amount of the General Partner’s obligation under the Operating Deficit Guaranty (the “**Maximum ODG Amount**”) is expended from other sources.
4. Transaction Expenses. In addition to any expenses that are the responsibility of the General Partner, if the transaction does not close due to the actions of the General Partner, or the inability of the General Partner to satisfy the Conditions Precedent contained herein, the General Partner shall be responsible for the legal costs incurred by the Limited Partner. Additionally, at the time of closing, the General Partner shall reimburse the Limited Partner for a portion of its legal and due diligence fees in an amount equal to the greater of (i) \$25,000 or (ii) the amount by which the Limited Partner’s legal and due diligence fees exceed \$75,000.

Please note that this letter is provided for application purposes only and a final offer will be subject to updated numbers and market conditions at the time of the offer. We wish you success in the application process and look forward to working with you on this transaction.

Very truly yours,

R4 CAPITAL LLC

By:

Name: Jay Segel

Title: Executive Vice President

AGREED AND ACCEPTED THIS

____ day of _____, 2018

COMMONWEALTH COMMUNITY DEVELOPERS, LLC

By:

Name:

Title:

:

WESTMINSTER SENIOR HOUSING

Westminster, MA

OWNER
COMMONWEALTH COMMUNITY DEVELOPERS, LLC
Cambridge, MA

ARCHITECT
WINSLOW ARCHITECTS, INC.
Arlington, MA

CIVIL ENGINEERING
HANCOCK ASSOCIATES
Marlborough, MA

MEP/FP ENGINEERING
NORIAN / SIANI ENGINEERING, INC.
W. Concord, MA

STRUCTURAL ENGINEERING
DM BERG CONSULTANTS, P.C.
Needham, MA

SPECIFICATIONS
WIL-SPEC
Lynnfield, MA

LANDSCAPE ARCHITECT
HAMMER + WALSH DESIGN INC.
Boston, MA

COST ESTIMATING
A.M. FOGERTY
Hingham, MA

DRAWING LIST

Sheet Number	Sheet Name
G-001	TITLE SHEET
C-1.01	LOCUS PLAN
C-1.02	SITE PLAN
A-1.01	FIRST FLOOR & UNIT PLANS
A-1.02	SECOND & THIRD FLOOR PLANS
A-1.03	ELEVATIONS
A-1.04	RENDERINGS



Date issued:

08-17-18



89 MASSACHUSETTS AVE.
ARLINGTON, MA 02474
P: 781 648.6600
F: 781 648.6601
www.winslowarchitects.com

Proposer:



Proposer:

COMMONWEALTH
COMMUNITY
DEVELOPERS

Project:

WESTMINSTER
SENIOR HOUSING

Drawing:

TITLE SHEET

Project Status		
Revisions:		
No.	Description	Date

Stamp:

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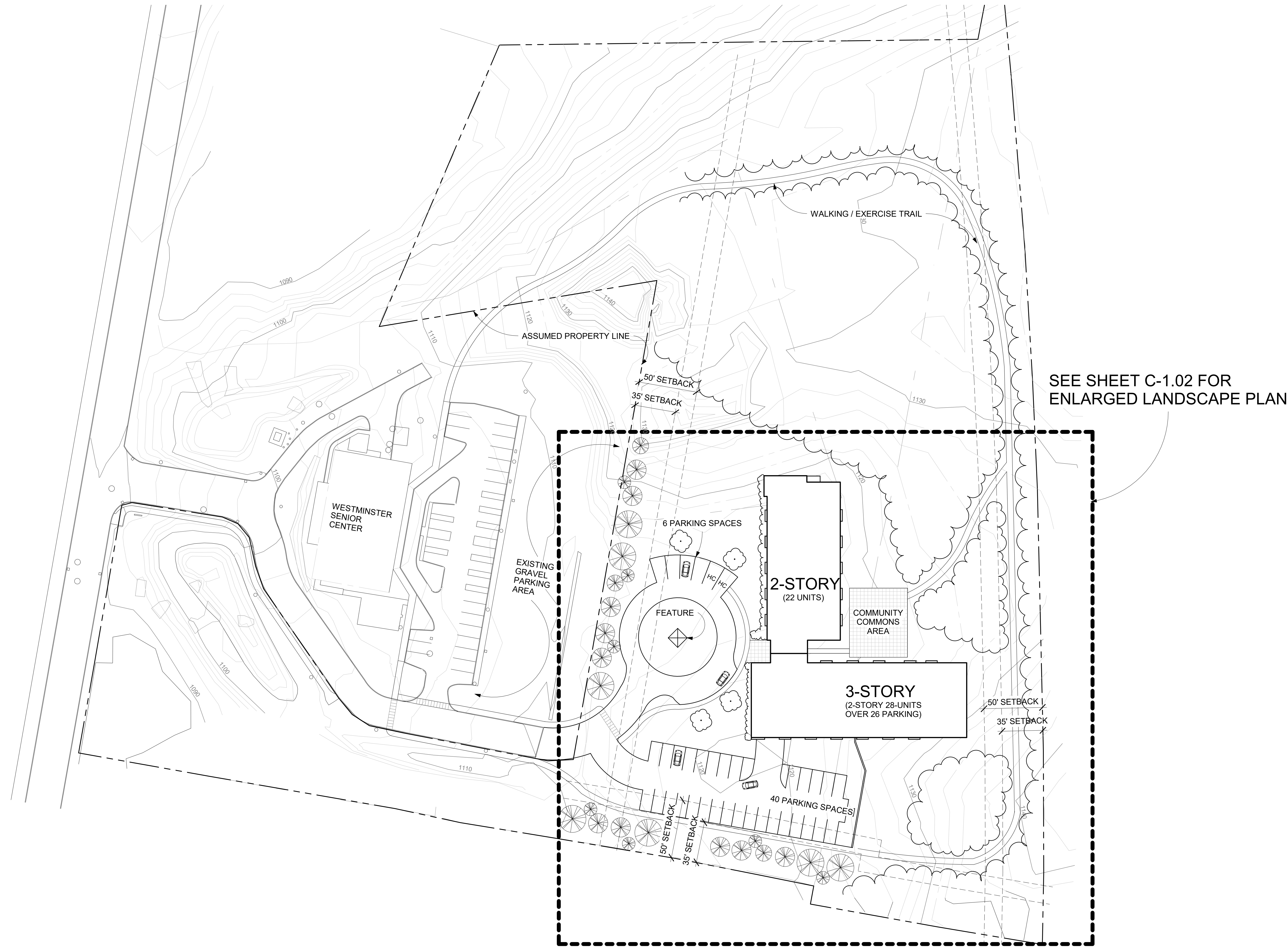
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Project number:

18-553

Sheet:

G-001



WESTMINSTER SENIOR HOUSING

Westminster, MA

SITE PLAN

Scale: 1" : 40'

Date issued:

08-17-18



WINSLOW
ARCHITECTS
INC

89 MASSACHUSETTS AVE.
ARLINGTON, MA 02474

P: 781 648.6600
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Proposer:



Proposer:

COMMONWEALTH
COMMUNITY
DEVELOPERS

Project:

WESTMINSTER
SENIOR HOUSING

Drawing:

LOCUS PLAN

Project Status

Revisions:

No.	Description	Date

Stamp:

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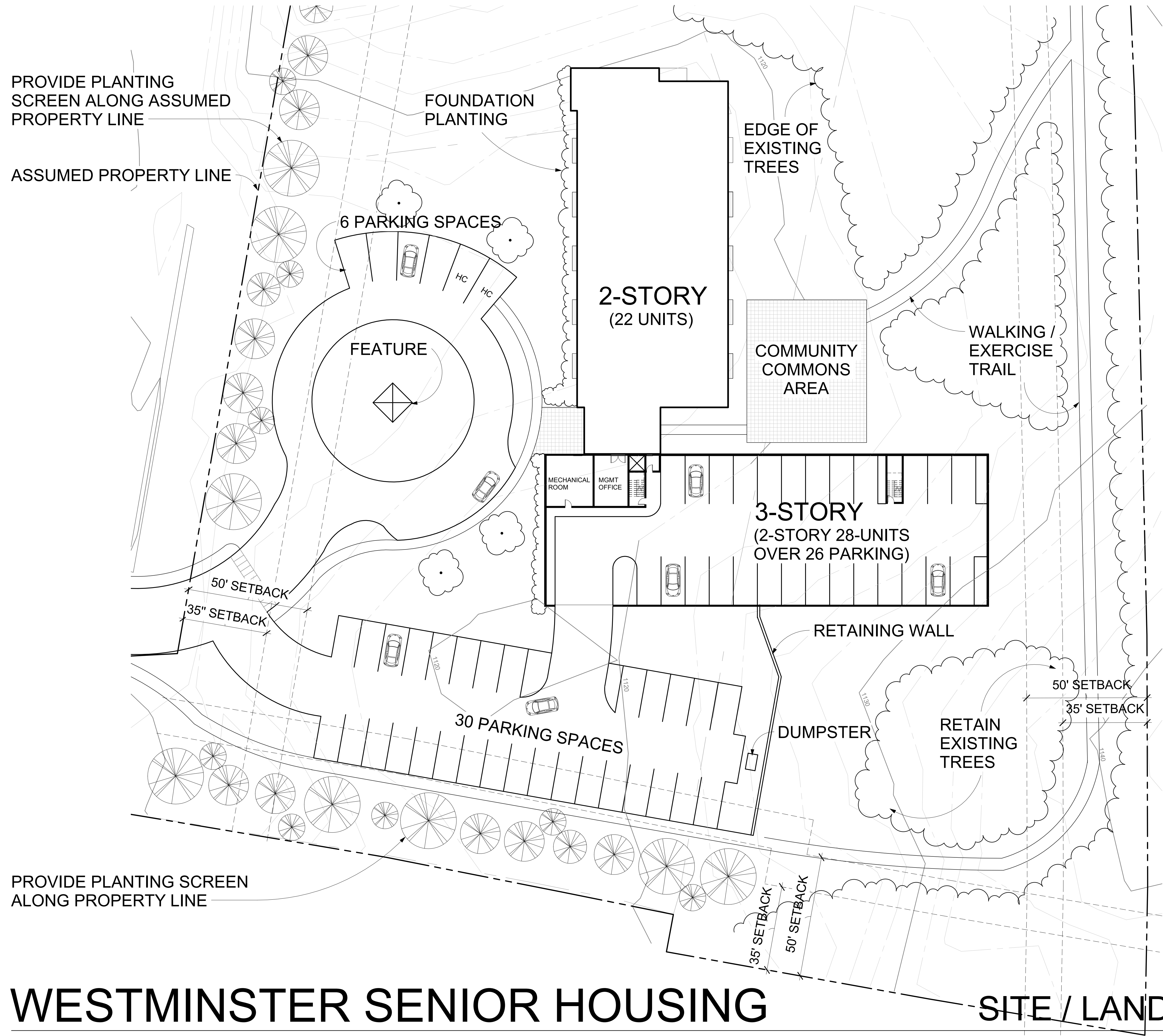
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Project number:

18-553

Sheet:

C-1.01



WESTMINSTER SENIOR HOUSING

Westminster, MA

SITE / LANDSCAPE PLAN

Scale: 1" : 20'

Date issued:

08-17-18



89 MASSACHUSETTS AVE.
ARLINGTON, MA 02474
P: 781 648.6600
F: 781 648.6601
www.winslowarchitects.com

Proposer:



Proposer:

COMMONWEALTH
COMMUNITY
DEVELOPERS

Project:

WESTMINSTER
SENIOR HOUSING

Drawing:

SITE PLAN

Project Status		
Revisions:		
No.	Description	Date

Stamp:

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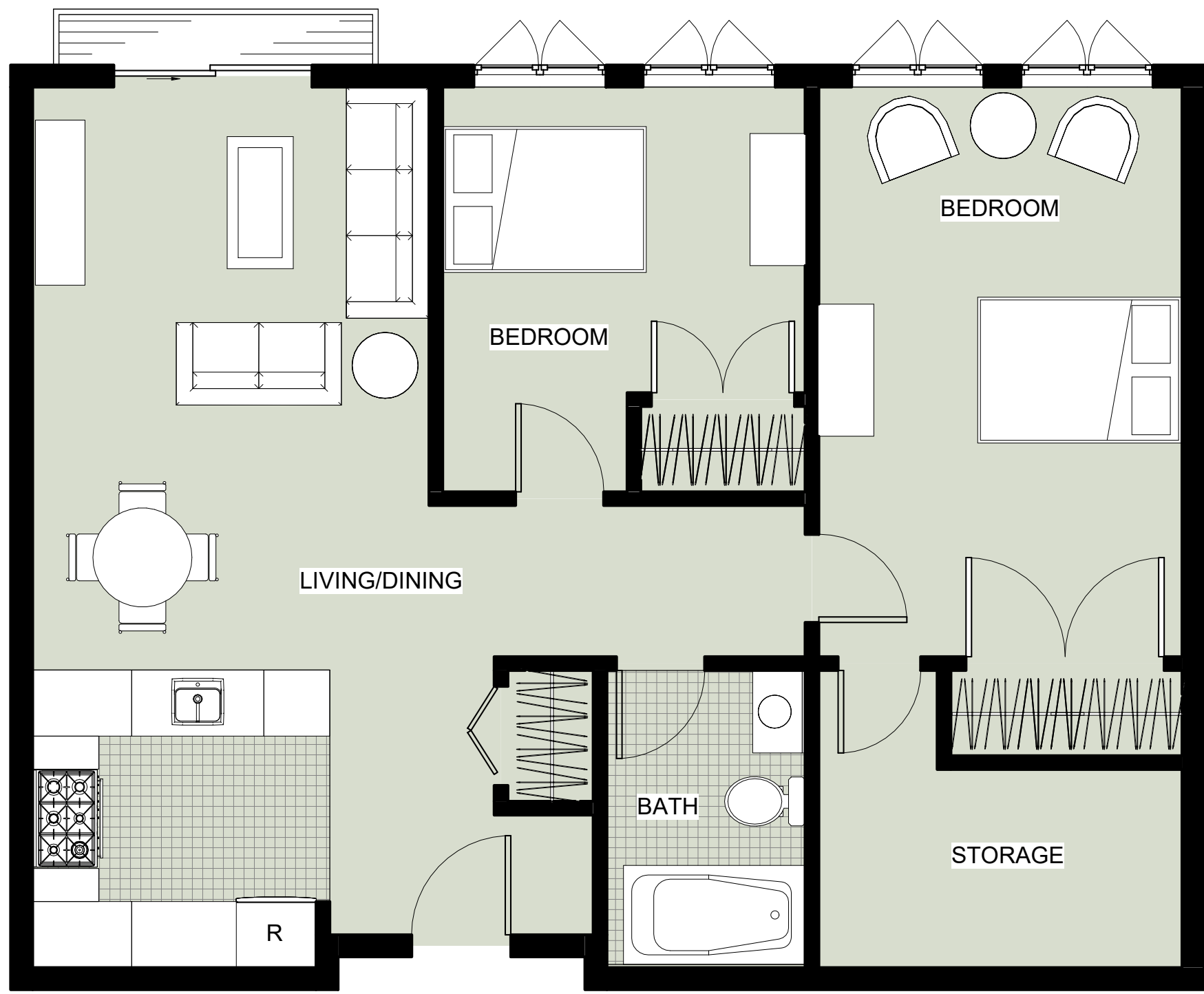
Project number:

18-553

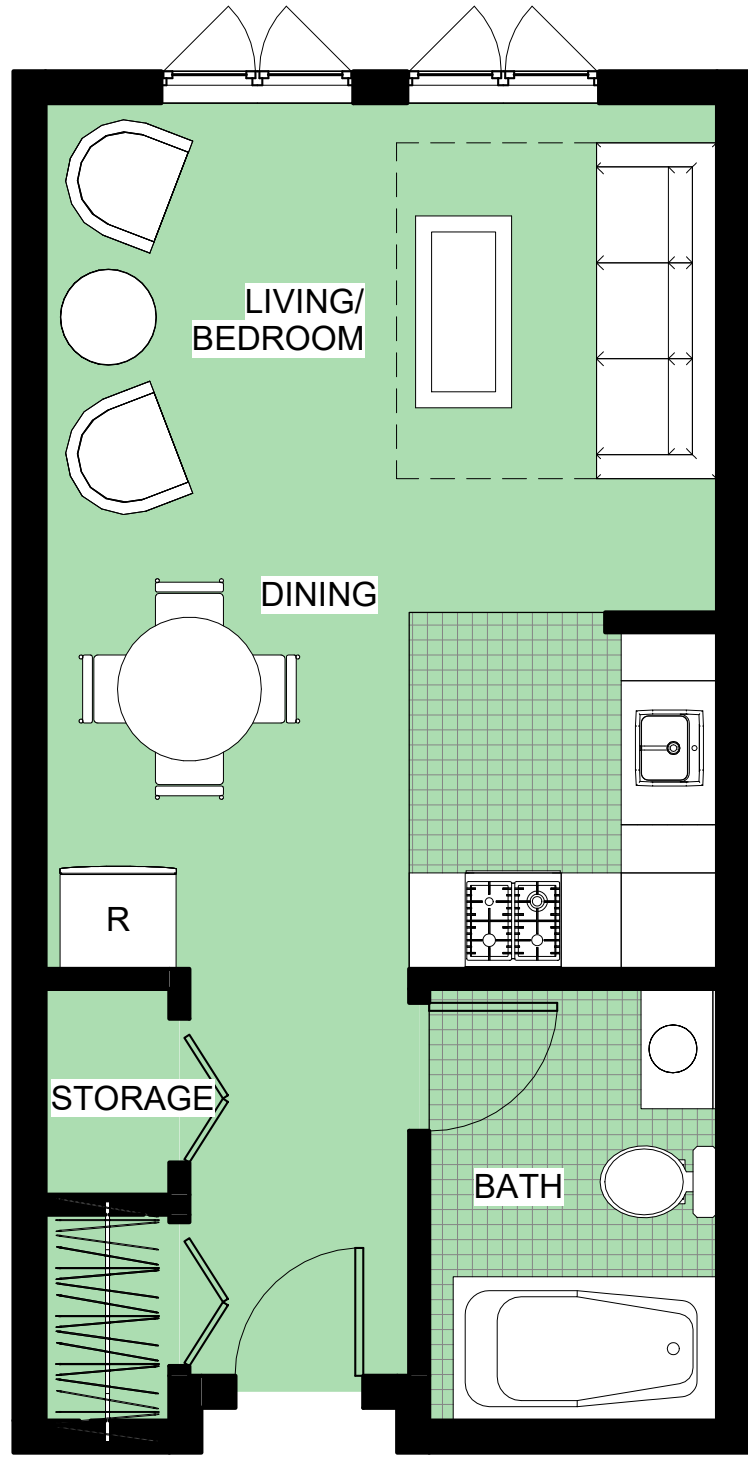
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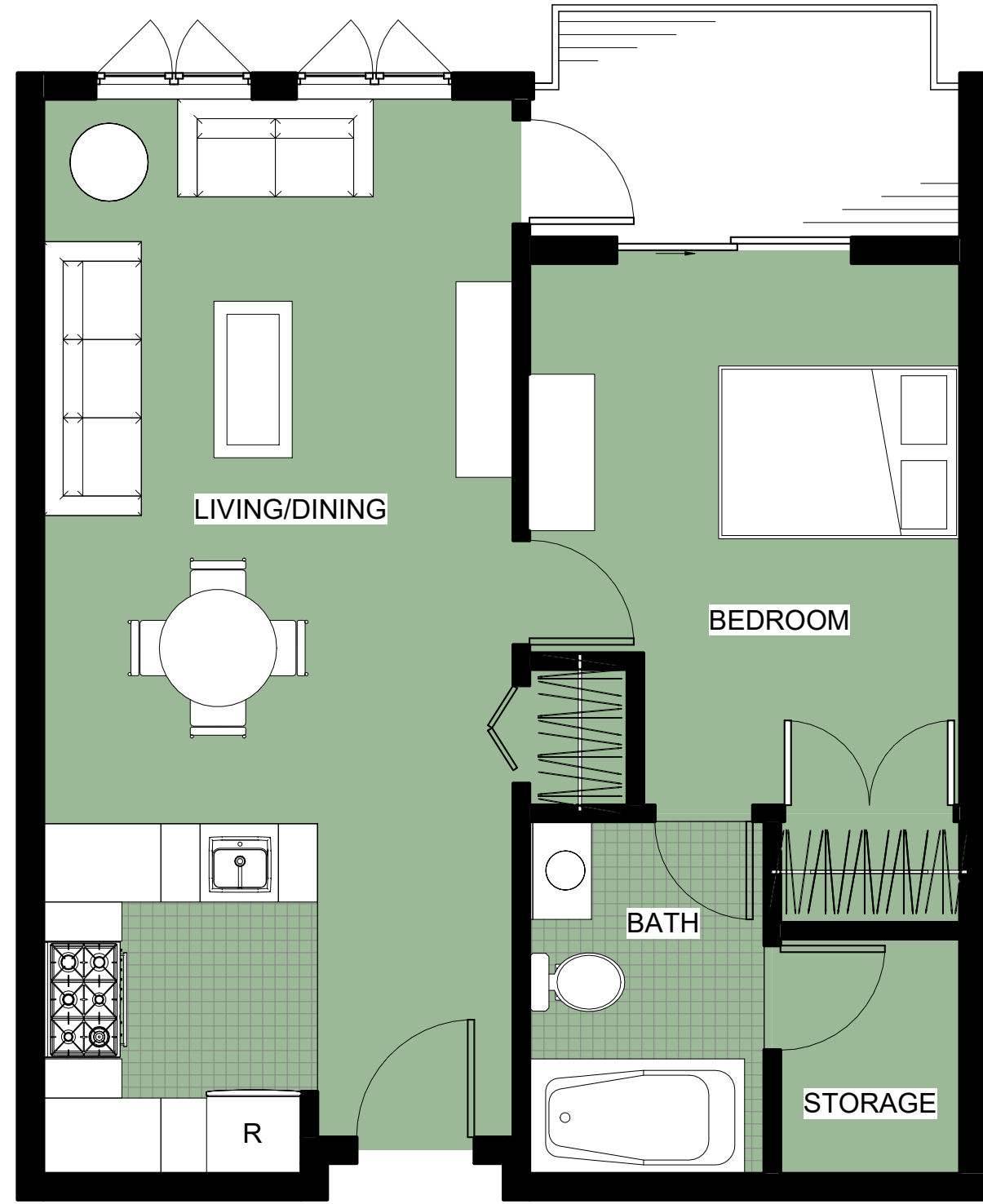
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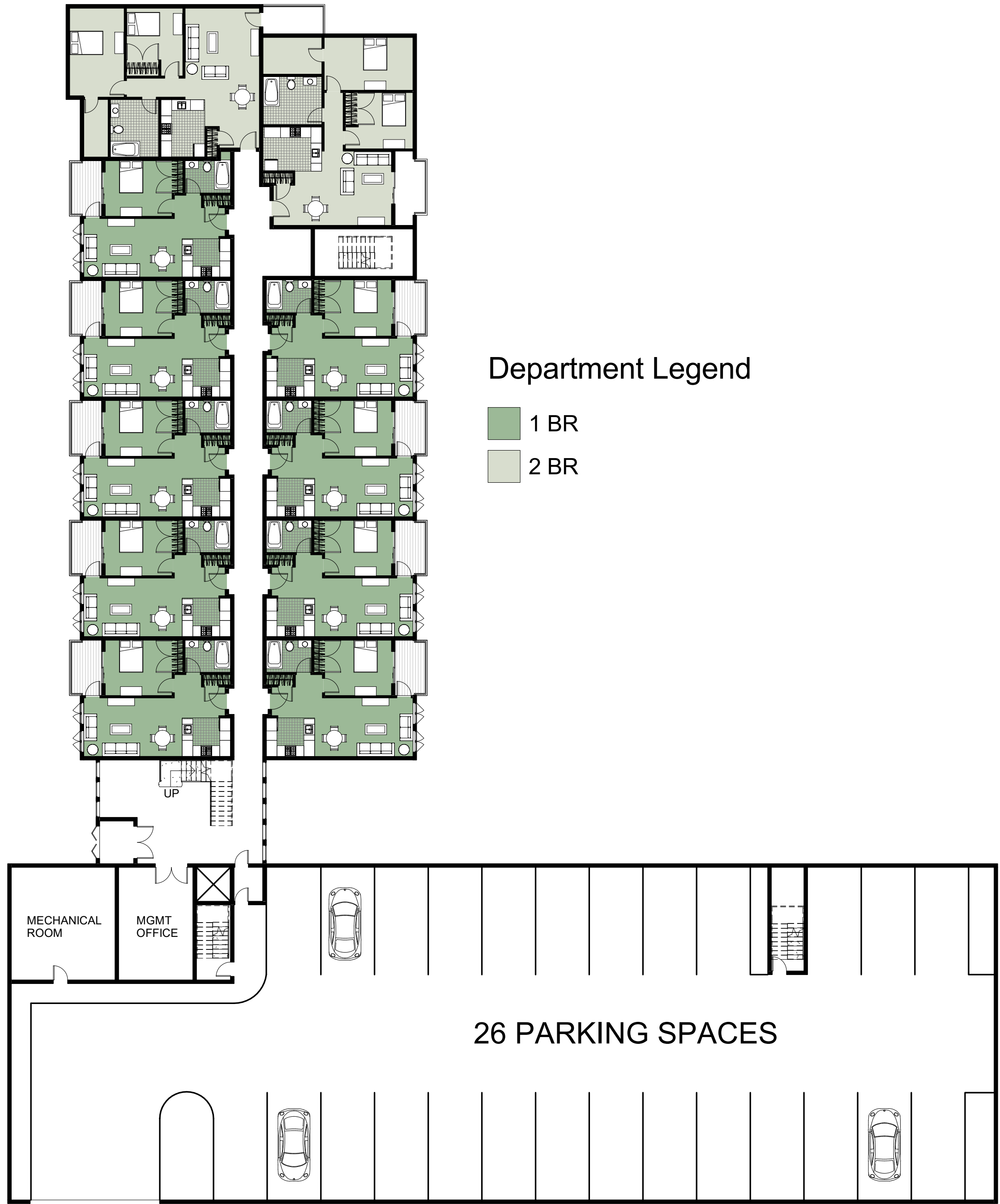
④ UNIT PLAN - 2 BR
1/4" = 1'-0"



③ UNIT PLAN - STUDIO
1/4" = 1'-0"



② UNIT PLAN - 1 BR
1/4" = 1'-0"



① FIRST FLOOR PLAN
1/16" = 1'-0"

Department Legend

- 1 BR
- 2 BR

WESTMINSTER SENIOR HOUSING

Westminster, MA

1st FLOOR & UNIT PLANS

Date issued:

08-17-18



89 MASSACHUSETTS AVE.
ARLINGTON, MA 02474
P: 781 648.6600
F: 781 648.6601
www.winslowarchitects.com

Proposer:



Proposer:

COMMONWEALTH
COMMUNITY
DEVELOPERS

Project:

WESTMINSTER
SENIOR HOUSING

Drawing:

FIRST FLOOR
& UNIT
PLANS

Project Status		
Revisions:		
No.	Description	Date

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18-553

Sheet:

A-1.01



② THIRD FLOOR PLAN
1/16" = 1'-0"



① SECOND FLOOR PLAN
1/16" = 1'-0"

WESTMINSTER SENIOR HOUSING

Westminster, MA

2nd & 3rd FLOOR PLANS

Date issued:

08-17-18



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COMMUNITY
DEVELOPERS

Project:

WESTMINSTER
SENIOR HOUSING

Drawing:

SECOND & THIRD FLOOR PLANS

Project Status

Revisions:

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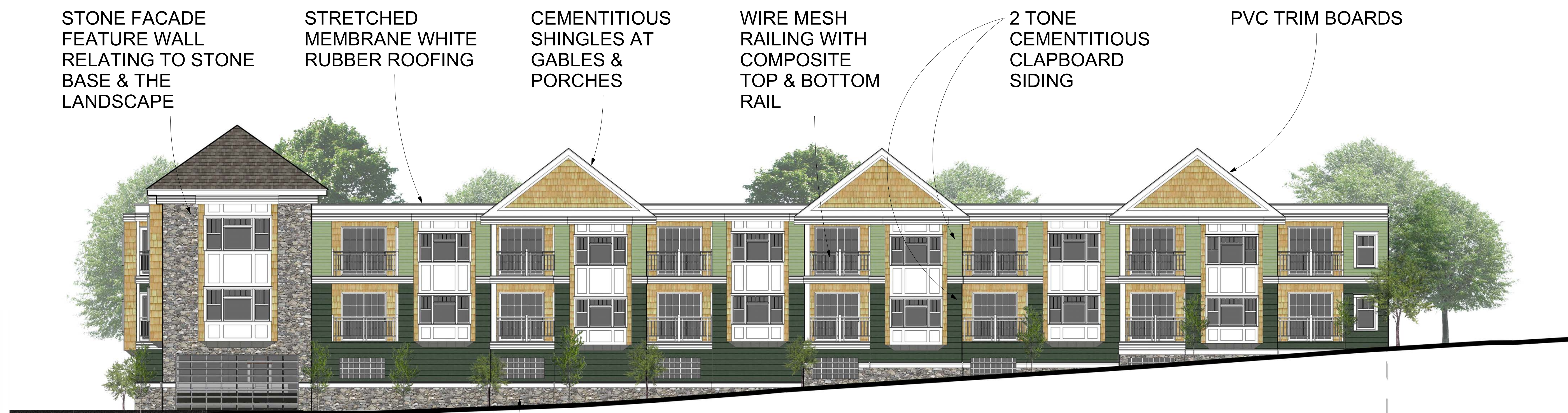
Project number:

18-553

Sheet:

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STONE FACADE
BASE, STEPPED
WITH GRADING

LINE OF PARKING BELOW

40 YEAR ARCH. GRADE
WEATHERED WOOD
APPEARING ASPHALT
SHINGLE ROOF



WESTMINSTER SENIOR HOUSING

Westminster, MA

ELEVATIONS

Date issued:

08-17-18



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Proposer:

COMMONWEALTH
COMMUNITY
DEVELOPERS

Project:

WESTMINSTER
SENIOR HOUSING

Drawing:

ELEVATIONS

Project Status

Revisions:

No.	Description	Date

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WESTMINSTER SENIOR HOUSING

Westminster, MA

RENDERINGS

Date issued:

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Proposer:

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Project:

WESTMINSTER
SENIOR HOUSING

Drawing:

RENDERINGS

Project Status		
Revisions:		
No.	Description	Date

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4. Management Plan

a. Target Market

The real estate market in North-Central Massachusetts has become heated. The Westminister rental market is tight, with many apartments not affordable.

The marketing study required to be done by a licensed and qualified appraiser as part of the LIHTC application process will, among other things, establish market rents, based on rents at comparable properties, and provide demographic information for the area. Our marketing will target households meeting the income requirements and for whom we expect to have an apartment of the proper size. Special effort will be made to reach the racial and ethnic groups that are least likely to apply for an apartment at the Westminister Senior Residences. We anticipate that the primary market area will be the town of Westminister and that the secondary market area will be the abutting towns of Fitchburg, Leominster, Princeton, Hubbardston, Gardner and Ashburnham. There will be a residency preference for residents of Westminister for the maximum number of units allowed under the various regulatory programs. We believe the residency preference could cover 70% of the units. Most marketing will be targeted to the primary market, but some will be targeted to the larger secondary market.

Utilizing demographic data such as that found in the LIHTC market study, an Affirmative Fair Housing Marketing Plan will be completed in the HUD format. It will identify populations least likely to apply for the housing without special outreach efforts and will identify such outreach efforts.

Press releases will be sent out. A for rent sign will be erected. Notice of availability of an affordable rental housing lottery will be delivered to Town Hall, local houses of worship, the Public Library and other locations at which we might be able to reach our senior, income-qualified population. Community organizations, municipal departments and social service agencies that might deal with helping people to find housing will also be notified. The apartments will be listed for rent in local news sources such as the Fitchburg/Leominster Sentinel and Enterprise. The rentals will be listed with online sites such as affordablehousingonline.com, craigslist.org and perhaps a general site such as apartments.com. The accessible units will be posted with MassAccess, the accessible housing registry.

b. Management

The successful management of any residential community requires a management strategy that recognizes the specific challenges facing each neighborhood and its residents. We understand the complexities of managing affordable housing. We get involved with residents of diverse backgrounds, both to help them advance their dreams and to address issues that arise before they become real problems. We are committed to creating a strong sense of community and a great place to call home. Frequent staff trainings focus on best practices in the industry. Our high management standards and top notch services to residents often make affordable properties appear indistinguishable from market rate and even luxury developments -- even within tight budgetary limits.

Our property management services include astute marketing, careful tenant selection, efficient operation, prompt and preventive maintenance, strict compliance with affordability requirements, tight financial management and cost-effective resident services.

The management strategy becomes embodied in a sound Management Plan (the "Plan"), which becomes an attachment to the Management Agreement between the owner and the agent and remains in effect throughout the affordability period. The Plan will comply with all applicable federal, state, and local laws. The following is an outline of what will be in the Plan:

a) Property Description

1. Name of owner
2. Name and location of property
3. Number of units by bedroom size
4. Type of construction (i.e., new construction)
5. Building type (i.e., garden style)
6. Occupancy type: Senior
7. Occupancy standards (the minimum/maximum number of persons per unit, as set forth in the Tenant Selection Plan)

b) Management Company Organization

1. CCD is committed to providing employment, contracting opportunities and housing to local residents, minorities and women, and we encourage our outside team members to do so as well. Company's hiring policies, which are in conformance with applicable equal opportunity requirements of local, state, and federal laws and Section 3.
2. CCD will not discriminate on the basis of race, color, religious creed, ancestry, gender, sexual orientation, age, disability, national origin, or any other basis prohibited by law.
3. CCD's organizational culture emphasizes:
 - a. Promote the Company values of: integrity, trust, respect for employees

and residents, passion for providing high quality developments and services for residents of all incomes, innovative deal structuring and financing, working smart, open communication, and sustainability;

- b. Foster a supportive, team-oriented work environment that encourages the growth and development of employees; and
- c. Offer employees an opportunity to contribute directly to the Company's goals, accompanied by clear performance objectives and the responsibility for delivering, along with rewards for exceptional results.

c) Site Staffing:

- Job descriptions (including number of hours worked per week for each position)
 - Site manager (24 hours per week)
 - Maintenance technician (24 hours per week)
- Employee Policies
- Training methods for site employees
- Methods of monitoring performance and accountability of site staff
- Employee grievance procedures
- Reasonable Accommodations policy for disabled employees

d) Security:

- Build community and communication among the management staff, residents, local police, and relevant local agencies.
- Neighborhood watch
- Key control via key fobs or cards
- Rules enforcement policies
 - Adherence to rules a condition of lease
 - Not permitting minor infractions, which can lead to a culture of ignoring more serious rules.
 - Evictions for nonpayment and other causes
- Emergency preparedness procedures and the chain of person(s) responsible in the event of an emergency, starting with the site manager up to the president.
- Monitored surveillance cameras at entryways, corridors, other common areas and exterior.
- Security guard company - as and if needed, and (only) for as long as needed
 - Vary the hours of the shifts
 - Coordinate with police presence

e) Marketing

1. Refer to the Affirmative Fair Housing Marketing Plan, which is incorporated herein.

2. Document and monitor the effectiveness of the marketing efforts.
- f) Tenant Selection: Refer to the Tenant Selection Plan, which is incorporated herein.

Case Study: Turnaround

We have had experience managing a wide variety of properties: rural, suburban and urban; elderly and family; affordable, mixed-income and market; rental and condominium; new and old. Each property has different needs – in the case of security, some need frequent security coverage while others need it seldom or not at all -- and those needs vary over time, with the quality of management, changes in the neighborhood and the particular population of tenants. We don't anticipate having significant security concerns at the Westminster Senior Residences, but include this case study to give you a sense of our management approach.

A few years ago, while at The Community Builders, I was asked to evaluate a property in a dangerous neighborhood in New Haven. The property had been nothing but problems and the leadership team thought the property should be sold.

The neighborhood had for a long time been experiencing gang violence, drug dealing and prostitution. Shortly after I got involved with the property, a 5-year-old boy was shot by a gang member aiming for the boy's father. (Fortunately, the boy survived.) The property consisted of thirty small buildings scattered over several city blocks, intermingled with buildings owned by others: it was thus very hard to secure. After meeting with staff, residents, city officials, police and neighborhood stakeholders, I recommended keeping the property. I then devised and implemented a plan to turn things around. Here are some of the steps we took:

- Repair relations with city hall and the police department, which had been long neglected.
- Cooperate closely with the police by:
 - keeping them informed of problems at our properties and in the neighborhood;
 - giving them keys to the outside doors of the buildings, so they could go inside after drug dealers
 - hiring off duty police as security guards for several shifts a week; the hours of the shifts varied so that criminal elements would never know when they were coming;
 - allowing the police to make regular use of the community room when they needed access to a computer for monitoring street cameras while in the field.

As a result, the police were much more responsive when we or our tenants called.

- Replaced the site manager and other staff, instead hiring qualified professionals with ties to the neighborhood.
- Hired a retired policeman, well respected in the city, to serve as our head of resident services and security (this involved some creative adjustments to the operating budget).
- Management staff and I got involved with community groups, listening to their concerns and letting them know what we were doing to improve things.
- Convinced The Community Builders, as owner of the property, to front \$100,000 for a series of small but important improvements at the property.
- Installed strong metal rail fencing (similar to wrought iron) in the front of each property to create an identity and separate the private space from the public -- a psychological barrier to keep out those who didn't belong.
- Installed tall fencing at the rear of some of the properties to cut off escape routes (we didn't do all owing to budgetary limits).
- Got HUD approval to add a working families preference to the Tenant Selection Plan, enabling us to exclude households where no one was working, in order to reduce the number of people loitering at the property. (This did not, however, exclude anyone who was elderly or disabled.)
- Increased rules enforcement, including eviction -- the worst tenants were the biggest breakers of the rules.
- Got HUD to stop the rental subsidy for the worst rule breakers -- it might seem counter-intuitive to deliberately reduce the property's income, but this enabled us to evict the tenants for nonpayment of rent, which cut months off the eviction process.
- Initiated daily cleanups outside the buildings, repainted the building entrances and did some plantings in the front of the property to show that the properties were now being cared for.
- Removed some masonry projections from the front of a couple of buildings so they no longer provided convenient spaces to sit and loiter.
- Got the tenants much more involved in caring for the property and ultimately got some of them to trust the police sufficiently that they were willing to call when there was something going on.

The upshot was a considerable reduction in crime in the neighborhood, and at these buildings in particular. Things changed to the point that City Hall ultimately supported us in a successful LIHTC application so we could undertake much needed renovations to the buildings. Of course, the renovations included security enhancements, including monitored cameras, strengthened outside doors and frames, a key fob system and additional fencing. The property was awarded a National Communities of Quality Award for Outstanding Turnaround of a Troubled Property by the National Affordable Housing Management Association (NAHMA).

The point here is that each property has its own needs -- security and otherwise -- which can be addressed by thoughtful attention to the roots of the problem and finding creative, out-of-the-box solutions.

c. Lottery

All prospective tenants will be given literature that describes the new apartments and the lottery and rental procedure, including the date of the lottery, as well as a rental application package. The site manager will be available at set times to answer questions about the apartments and how to complete the application. Management will perform an initial review of each application for completeness and eligibility: applicants with incomplete applications will be given a chance to complete them and applicants whose household income is above the relevant income limit will be considered ineligible. The names of each eligible head of household who applied will be written onto a small card -- all cards should be identical (limit one per household). Everyone who applied, as well as any Town officials who would like to come, will be invited to the lottery drawing. The developer will designate a staff person to pull out the cards containing names in random order. Another staff person will record the name and the order in which it was drawn, and these applicants will be placed on the wait list in that order. This will continue until all cards have been drawn and recorded.

All applicants will be notified of their number in the drawing. Staff will review and verify the applications starting with the lowest number (earliest drawn) for each type of apartment and each preference. Residents of Westminster will get a preference (as will be stated in the Tenant Selection Plan) that will cover the maximum number of units permitted by governmental funding sources (we believe that as many as 70% of the units may be allowed). If an application satisfies the qualifications in the Tenant Selection Plan, and there is a suitable apartment available for the applicant, the file is then sent electronically to A.J. Johnson, the Affordable Housing Monitoring Agent, for approval. Once A.J. Johnson has approved the application file, the new tenant is notified of her or his

acceptance and a time is set to sign the lease, collect the money due and hand over the keys.

Tenant Selection Plan: The TSP will be completed in the format approved by MassHousing. It will provide for the following:

- Equal Opportunity:
 - Nondiscrimination
 - Reasonable accommodation policies for disabled residents
 - Reasonable steps to ensure that people with limited English proficiency have access to the housing at the Project
- Eligibility for Occupancy:
 - Income eligibility (30% or 60% of AMI)
 - Age limit: anticipate that one household member must be at least 62
 - Safety, criminal behavior and suitability for residency
 - Accessible units have a preference for the disabled
- Application Procedures:
 - Application completeness
 - Preferences required by funding and rental assistance programs, such as income targeting in connection with Section 8 and Section 811 Project Based Vouchers
 - Preference for residents of the Town of Westminster (anticipate preference for up to 70% of units)
 - Verification and screening of applications
 - Application review by affordable housing monitoring agent
 - Selection for admission
 - Denial of applications; notification to household
 - Consideration of mitigating circumstances
 - Appeal procedures
- Maintenance of the waiting list:
 - Applications from eligible households will be placed on the waiting list based upon appropriate bedroom size and income tier. The application will be ranked first by the residency preference and then by the date the completed application is received.
 - The list will be checked and verified annually.
- Unit Assignment and Leases

- Number of persons (2) per bedroom; exceptions in connection with Fair Housing
 - Assignment of accessible units
 - Lease provisions
 - No smoking policy
 - One pet policy; removal of pet
 - Determination of tenant rents for assisted units (30% of income)
 - Internal transfers-based on change in family size
- Recertification of Resident Incomes-annually
- Termination of Tenancies
- Resident Grievance Procedures
- Attachments:
 - Eligibility criteria and occupancy standards
 - Blank rental application and associated forms
 - Blank lease and associated forms

5. Implementation Plan and Timetable

a. Detailed Development Schedule

If our team is designated as developer of the site, we will proceed on several tracks at once:

- Due diligence: We will complete environmental, hazardous materials, title search and other due diligence. Our ability to proceed is, of course, contingent on good title. Note that the development budget contains \$6,000 for environmental and hazardous material investigation, testing and reports.
- Agreement with the Town of Westminster: negotiate and execute.
- Design: We will advance the design in several stages:
 - Community process and permitting: drawings for presentations and meetings with the community and before municipal boards and committees;
 - Finance: drawings and specifications required for the One Stop Application for Low Income Housing Tax Credits; and
 - Construction: drawings and specifications for bidding, building permit and construction.
- Community process and permitting:
 - Site plan approval
 - Design approval
 - Special permits or other zoning relief (possibly including a "friendly" 40B)
 - Any other approvals needed
 - Building permit
- Finance: applications for each source of funds

Once the financing is all committed, we will proceed to close on the purchase and the financing. Construction will start the day after closing. Some early construction activities, such as mobilization, might commence prior to closing, with the approval of the Town and the funders. Construction will last a year. Marketing activities will commence approximately four to six months prior to the anticipated completion of the buildings. Once the buildings are completed and certificates of occupancy are issued, approved tenants will begin moving in.

Please see the Development Schedule on the next page.

Commonwealth Community Developers		Target Date
Development Schedule Worksheet		
Westminster Senior Residences		
Developer Designation and Site Control		
Proposal submitted		8/17/2018
Interview with Selection Committee		9/15/2018
Negotiation		10/20/2018
Developer Designation vote of Selection Committee/authorized Board		10/25/2018
Execute Agreement with Town		10/31/2018
New name for project		11/10/2018
Site Investigation		
Complete Phase I Environmental Site Assessment and hazmat due diligence		11/30/2018
Complete Phase II ESA if needed		12/31/2018
Complete preliminary title search		11/30/2018
Existing conditions survey with flood zone certification		11/30/2018
Geotechnical assessment		12/31/2018
Design		
Enter into AIA contract with architect		11/5/2018
Complete drawings for entitlements		12/31/2018
Revise drawings if required by community process		4/30/2019
Design development		6/30/2019
Utility design		3/31/2019
Update cost estimate		7/20/2019
Energy usage analysis		5/31/2019
Value engineering		8/10/2019
Drawings and specifications for funding applications		10/15/2019
Complete Bid Set		7/31/2020
Complete permit set		10/31/2020
Complete Construction Documents		11/30/2020
Entitlements		
Final determination of zoning relief required		11/30/2018
Apply for 40B site designation from MassHousing if needed		1/10/2019
Establish parameters of "Friendly" 40B with Town - if required		1/20/2019
Meet with abutters		2/15/2019
Technical meeting with Town Department Heads		3/31/2019
Site plan approval		4/30/2019
Special permits other zoning relief		5/31/2019
40B comprehensive permit if required		8/31/2019
Building permit		11/15/2019
Financing		
Select lender(s) to submit applications for construction and permanent mortgage loans		9/10/2019
Apply for construction and permanent mortgages		9/30/2019
Receive preliminary commitment letter from mortgage lender		11/5/2019
Submit pre-application for 9% LIHTC and state AHTF funding		12/5/2019
Approval to submit application for 9% LIHTC and state AHTF funding		1/10/2020
Submit One Stop application for 9% LIHTC and state AHTF funding		2/15/2020
Award of 9% LIHTC and AHTF		7/31/2020
Carryover allocation		
Organizational Documents		
Create single purpose ownership entity		8/31/2020
Draft and execute initial operating / partnership agreement		8/31/2020

LIHTC Equity Financing	
Obtain letter of intent from syndicator for LIHTC applications	1/15/2020
Solicit syndicator proposals	8/5/2020
Select syndicator	9/5/2020
Negotiate letter of intent	9/20/2020
Prepare and submit investor due diligence to syndicator	10/15/2020
Review and negotiate Partnership Agreement	11/30/2020
Project-Based Subsidy	
Apply for PBVs as part of One Stop application	2/15/2020
Award of Section 8 PBVs	7/31/2020
Enter into AHAP	8/31/2020
Enter into HAP Contract	12/15/2020
General Contractor Selection	
Finalize front end specs	8/15/2020
Identify qualified contractors (particularly Delphi)	8/31/2020
Solicit bids	9/5/2020
Interview best Contractors, check references	10/15/2020
Select, notify and negotiate contract with selected GC	10/16/2020
Execute construction contract	11/15/2020
Closing	
Review and negotiate all legal documents	11/15/2020
Closing statement and initial requisition	11/15/2020
Zoning and tax opinions	11/15/2020
Obtain insurance	11/30/2020
Close acquisition and financing	12/15/2020
Construction	
Mobilize	11/25/2020
Submittals	12/30/2020
Begin construction	12/16/2020
Attain 50% completion	6/15/2021
Reach Substantial completion	12/15/2021
GC obtains Certificate of Occupancy	12/20/2021
As built plans	1/31/2022
Property Management and leasing	
Update operating budget	10/31/2020
Finalize AFHMP, Mgmt Plan and TSP	10/31/2020
Develop leasing materials	7/31/2021
Initiate pre-leasing efforts	8/31/2021
Lottery	11/15/2021
Property opens	12/25/2021
Continue lease-up	1/15/2022
Reach 100% occupancy	2/15/2022
Stabilized Occupancy	5/31/2022
Accounting Submissions	
10% Test	2/15/2021
Prepare and submit construction loan requisitions	multiple
Assemble required documents and obtain equity drawdowns	multiple
Cost certification	12/31/2021
Prepare and submit Form 8609	6/30/2022

b. Outline of Governmental or Regulatory Approvals

The Project would require a Special Permit from the Zoning Board of Appeals to develop apartments in an R-1 zone, along with Site Plan Approval from the Planning Board. At this stage in the design process, it appears that the Project will not need relief from setback requirements or other zoning provisions, although that may change as the design advances. We prefer utilizing the Town's conventional process rather than permitting through 40B. If the conventional process were unexpectedly delayed or interrupted, we would discuss with Town officials the possibility of pursuing a "Friendly" 40B Comprehensive Permit, or perhaps a 40B with support from the Board of Selectmen. As a matter of policy, we do not pursue 40B Comprehensive Permits without such community support.

6 – Required Forms

The following forms, executed by the Proponent, are attached:

- Certificate of Non-Collusion
- Tax Compliance Certificate
- Disclosure Statement for Transaction with a Public Agency Concerning Real Property

ATTACHMENT H

Certificate of Non-Collusion

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

Commonwealth Community Developers, LLC
Individual or Corporate Name of Proposer

August 13, 2018
Date


Signature of Authorized Agent
Agent

James J. Perrine, President
Printed Name of Authorized

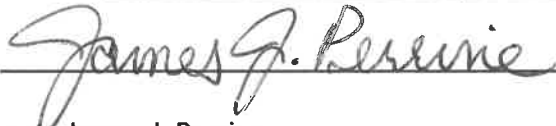
ATTACHMENT I

Tax Compliance Certificate

Pursuant to M.G.L., Chapter 62C, sec. 49A, the individual executing this proposal certifies, under pains and penalties of perjury, that to the best of his/her knowledge and belief the Proposer has complied with all of the laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Name of Proposer: Commonwealth Community Developers, LLC

Signature: _____



Printed Name: James J. Perrine

Title: President

Date: August 13, 2018

ATTACHMENT J

[To be completed prior to conveyance]

DISCLOSURE STATEMENT FOR TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)

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

- (1) Real Property: Westminster Senior Housing site, 69 Main Street,
Westminster, MA
- (2) Type of Transaction, Agreement, or Document: Land Disposition
Agreement
- (3) Public Agency Participating in Transaction: Town of Westminster
- (4) Disclosing Party's Name and Type of Entity (if not an individual) :
Commonwealth Community Developers, LLC, a limited liability
company
- (5) Role of Disclosing Party (Check appropriate role):

____ Lessor/Landlord X Lessee/Tenant

____ Seller/Grantor ____ Buyer/Grantee

____ Other (Please describe): _____

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

NAME

RESIDENCE

James J. Perrine

1588 Cambridge Street, Cambridge, MA 02138

William J. Cleary

14 Concord Avenue, Cambridge, MA 02138

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

None

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

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

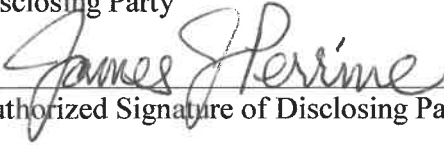
Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify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

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

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

Commonwealth Community Developers, LLC

Disclosing Party



Authorized Signature of Disclosing Party

James J. Perrine, President

Date August 10, 2018

Print Name & Title of Authorized Signer