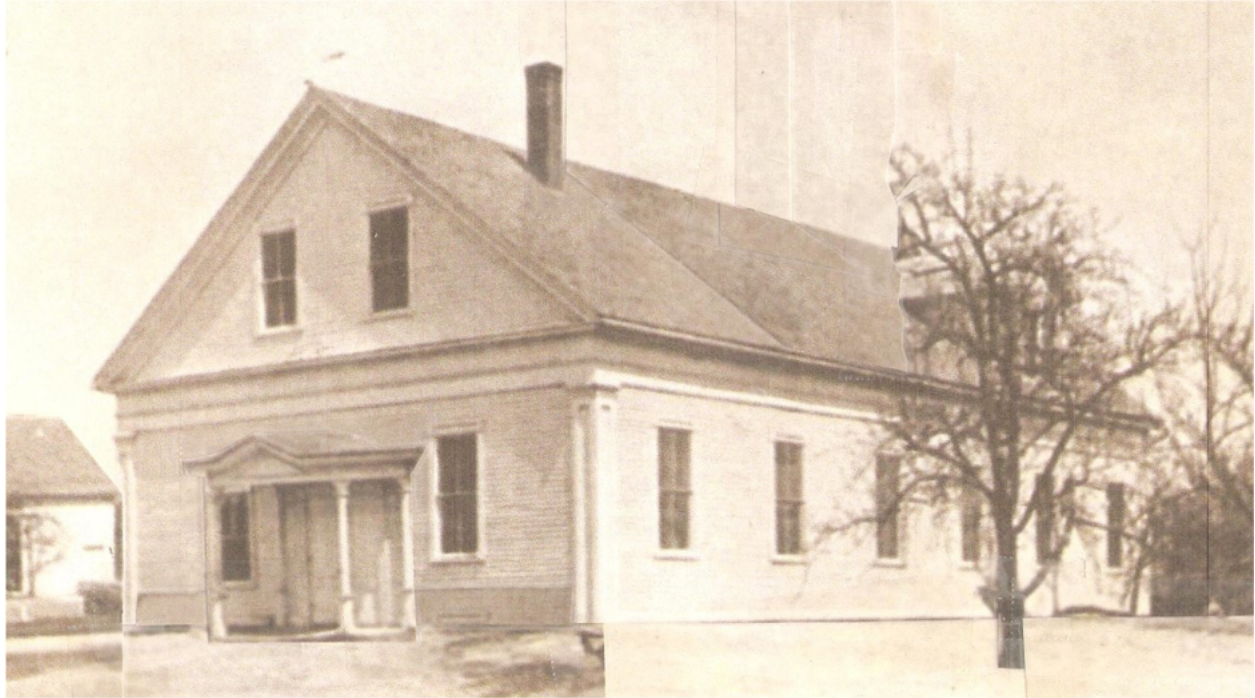


**PROPOSAL FOR REDEVELOPMENT  
OF THE  
HISTORIC MEETING HOUSE**



3 Bacon Street  
Westminster, Massachusetts

**Community Arts Foundation, Inc**  
**89 North Common Rd**  
**978-870-2361**  
**Joseph P. Serio, President**  
**Thomas J. Arsenault, Director**

**josephserio@yahoo.com**

**Submitted October 4, 2023**

# **PROPOSAL FOR REDEVELOPMENT OF THE HISTORIC MEETING HOUSE**

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**Community Arts Foundation, Inc.**

89 North Common Road  
Westminster, MA 01473  
josephserio@yahoo.com - (978) 870-2361

October 4<sup>th</sup>, 2023

Dear Old Town Hall Review Committee Members and Westminster Select Board,

We proudly submit our proposal in response to the RFP from the Town of Westminster, Massachusetts, for the Historic Meeting House, an emblem of our town's past and future.

The Community Arts Foundation presents a proposal dedicated not only to maintaining the physical and spiritual integrity of the Historic Meeting House but also to safeguarding its ongoing role as a vital community hub, a role it had fulfilled since 1839. Our approach, led by a seasoned local team, aims to reinvigorate it as a vibrant public space for performances, civic meetings, and events, amongst other functions.

Instead of opting for a sale to a developer for limited public use or erasing our community's history through demolition, our proposal imagines the structure standing resiliently as a fundamental pillar of Westminster's history, culture, and community for future generations. Community Arts Foundation ensures that the control of the building stays local for the use of the community. It is not owned by individuals but is a locally controlled nonprofit that was created for the benefit of Westminster. It has always been our belief that the town needs a community performing arts center and this is it.

The anticipated revitalization of the Meeting House promises to be a pivotal boost to Westminster, nurturing an environment where community and the performing arts prosper. Our vision ensures it not only preserves our history but also stimulates economic activity and further establishes our town as a thriving destination.

With threads of history that witnessed Lincoln's era and echoed Frederick Douglass' words who spoke at the Meeting House, the building is too precious to lose. Our proposal promises that future generations can continue to build on its rich narrative.

Our team at Community Arts Foundation brings relevant experience and a genuine connection to the Westminster community. We've crafted our proposal to ensure the Meeting House isn't just preserved but thrives as a vital entity serving our town.

Thank you for considering our proposal. We are available for further discussion and eagerly anticipate exploring our plans in greater depth to ensure the Historic Meeting House remains an active, integral part of Westminster's community life.

Joseph P. Serio, President, Community Arts Foundation, Inc.  
Thomas J. Arsenault, Director, Community Arts Foundation, Inc.

## Our Community Center

The Historic Meeting House, constructed in 1839, served as the focal point of the community for over 150 years. We intend to do so again.

*WHEREAS, in March 1842 the residents of Westminster voted at their annual town meeting "to have the Town House opened for all meetings of a Moral, Scientific and Literary nature, when any of the citizens of Westminster may request the same;" Wendell Phillips, Frederick Douglass, William Lloyd Garrison and other nationally acclaimed leaders of the Anti-Slavery Movement and the Women's Suffrage Movement spoke at the Town Hall during the nineteenth century; since the 1840s numerous groups utilized the Town Hall facilities for a wide range of activities including musical recitals, plays, weddings, church services, and meetings for veterans, civic groups, boy scouts and girl scouts.*

We will restore the Historic Meeting House to its original design of a two-story building at the cost of 1.6 million dollars. To do so would bring the theater from the second floor back to the first floor, as in the original design. By doing so, the meeting and performance space becomes significantly more accessible.

### Objective

You first have to ask yourself what project would have the greatest economic impact on the future of Westminster. Certainly not a building with just housing. We have plenty of those. Restaurants and retail are nice and a step in the right direction, but what is the most significant feature to create a vibrant center with more restaurants and retail space? The answer is performing arts space. It motivates us to get out of our houses and get together.

Our performance hall is not merely a venue but a catalyst for vibrant local commerce. Engaging shows draw patrons who invariably contribute to the economy, spending at nearby establishments either before or after the event. It's not only visitors who gravitate toward our center – our own community members find themselves spending time and money here, adding to the lively atmosphere of our downtown area, bustling with shops and restaurants.

In essence, a performance hall does more than entertain; it acts as a powerful stimulant for retail business creation, fostering a thriving, interconnected commercial ecosystem.



We've had a taste with an outdoor festival, music and events on Academy Hill, and church fairs. The town needs a permanent space to gather in our center to become the cultural center of North Worcester County.

## Honor

We will name the building to honor a person whose philanthropy to the region was significant; his generosity knew no bounds. It would be the Marcus Moran Jr Community Arts Center. The individual who contributed to our town and region was selfless and extraordinary, and he profoundly impacted all who knew him. He also was the founding sponsor of the Westminster Cracker Festival along with Aubuchon Hardware.

## Performance

The Community Arts Center will allow the community to gather as it did for generations. New memories will be formed in the 150-seat meeting room over live performances, town functions, and other gatherings. The use of the space by civic and business communities will significantly impact the town and boost the center. Over time, we expect the power of performance to bring our community together and move the town into a thriving future.

Any plan that does not preserve the meeting space and create access to the meeting space does not follow the intentions of the citizens' vote of the 1842 Annual Town Meeting. If we do not preserve this space, we are not promoting the best use of the building for the future generations of our community.

## Square

The lifeblood of a community is the center, and a performance space strengthens the community. Furthermore, the Library, Pharmacy, Coffee House, Congregational Church, and Preschool Academy are abutters of the Historic Meeting House. The exterior space of the respective properties was always informally shared for events and routine everyday activities of children. Long-time use of the space by the respective organizations has naturally created a second square for our Town. The utilization of the green space behind the Historic Meeting House should continue and be encouraged.

## Neighbors

The pedestrian flow from the building will be designed for exit towards Main Street and Bacon Street sides away from the neighborhood towards the center. Working with the town, we recommend no parking (other than residents) on the residential side of Pleasant Street and Bacon Street below Pleasant Street. Keep in mind that the building has had a 160-year relationship of being a good neighborhood. Better parking utilization on Main Street was a recommendation of the Walkability Study of 2012.

We also will allow some overnight parking as the center residents struggle with parking from November to April. Residents on Bacon and Pleasant streets will have access to the building to host events for their street, like the successful Halloween night trick or treating. We foresee the potential for a Monster Bash in the auditorium of the Community Arts Center. The auditorium can be used for civic gatherings, art shows, and agricultural markets.

## Historic Preservation

The historical preservation of this building is essential. The true importance to the Community is the availability to use the auditorium. It's also of considerable importance with the famous speakers in the context of history. In today's world, with so much discussion of the rights of both women and people of color, this auditorium was a forum for discussion on how to correct the injustices in our country. Not preserving that time in history and not making it part of the present with the continued use of this forum would be a grave injustice. To eliminate that hall would also not allow the present and future generations to celebrate in our community's most important place of assembly.

To be a historical building and present ourselves as a historical New England Town, it's not just about looking historical; it needs to retain the use and historic meeting room to benefit the entire community. This becomes part of the marketing to bring tourism to the community. The fact that Fredrick Douglass, one of the most influential leaders of the 19th century, spoke in this building is not only of historical significance, it is an attraction to bring visitors to see and understand a defining part of our history.

## Dance

This mixed-use building would have a full-time tenant with a dance studio, which is the perfect use for the youth of Westminster. A local dance studio has expressed a repeated desire to have its dance academy in the auditorium. The beauty is that she needs a big,

wide open room, and the historic sprung floor has bounce. Such floors are considered the best kind to dance.

The space can be shared with other events because most businesses require customized space that precludes it from being used for other purposes during school hours and evenings. The auditorium would also be used for social gatherings catered by local restaurants such as Blueprint. Gatherings after services would be in demand, with three churches in the center. All are within a 5-minute walk and part of the success of the walkability of Westminster Center.

## Building

The addition of an additional story decades after the original construction significantly increased the load on the foundation that was designed for the 1 1/2 story building of 1839 and probably done without adequate engineering, according to the McGinley, Hart & Associates report on the Old Town Hall in 2002. It also was placed on brick pillars that are softer than wood or concrete. The report went on to say that the 20-foot addition built in the same period as the lifting of the building should be removed and rebuilt.

Our plan would raise and roll the building to the side, excavate a full basement with a secure concrete foundation, and roll the building back onto the new foundation. The 20-foot addition would be removed and rebuilt to the historical look of the period.

The top floor would accommodate two residential units that would contribute significantly to the income stream of the building. The basement floor would have a foundation with higher casement windows to allow more light on that level. There would be two office rental units on this level in addition to the use of the space by nonprofits at nominal or no charge.

# Financial Capacity

## Estimated Cost of Project

Category	Description of Work	Phase 1 Cost	Phase 2 Cost	Phase 3 Cost	Total Cost
1	General conditions (temp facilities, safety, fencing, temp power)	\$5,750	\$2,400	-	\$8,150
1.2	Supervision 24 wks x 25hr wk = 600 x \$105 = \$63,000	\$20,790	\$23,310	\$18,900	\$63,000
2	Landscaping and site work	\$15,000	\$35,000	\$23,000	\$73,000
2	Exiting conditions (Sylvester bid, demo first floor, move building off and onto foundation) ALLOWANCE	\$96,000	-	-	\$96,000
2.1	Dumpsters (8-30 yds.)(4-30yds in Phase 2)	\$8,000	\$4,000	-	\$12,000
2.2	Concrete Slab (New 4' concrete slab in basement with wire) 40 cyds. X \$275 (pump)	\$21,000	-	-	\$21,000
3	Concrete (demo foundation, new foundation excavation, new 9' x 10" foundation 41' x 73', cut/cap, utilities, foundation drain, damp proofing, & gravel backfill)	\$96,000	-	-	\$96,000
3.1	New utility hook-up (wtr./swr/elec/ storm)	\$20,000	-	-	\$20,000
6	Carpentry ALLOWANCE (2- apartments on second floor IN P2)	\$15,000	\$85,000	\$20,000	\$120,000
7	New Roof (50 yr. asphalt / strip / reroof) Estimate 44 sq. x \$670/sq.= \$29,480	-	-	\$29,480	\$29,480
7.1	Insulation, spray foam closed cell walls and ceiling, fiberglass floor ALLOWANCE	-	\$31,000	\$29,500	\$60,500
9	Painting exterior / interior ALLOWANCE	-	\$45,000	\$15,000	\$60,000
9.1	Sheetrock / plaster repairs	-	\$62,000	\$5,000	\$67,000
21	Fire suppression (sprinklers) ALLOWANCE using CPVC PIPING	-	\$57,500	-	\$57,500
22	Plumbing (male/ female bathrooms 1st flr per code) ALLOWANCE 2 full baths on second floor apartments	\$12,000	\$68,000	-	\$80,000
23	HVAC (forced hot air/ac) ALLOWANCE (Mini split systems in apartments)	-	\$95,000	\$5,000	\$100,000
26	Electrical (new 200 amp service, new wiring to code, smokes, exit signage)2 apts.	\$20,000	\$65,000	\$10,000	\$95,000
27	Parking Lot (added 4 spaces for apartment 1-space per bedroom)	-	\$26,000	-	\$26,000
28	Elevator	-	\$100,000	-	\$100,000
29	Appliances	-	\$12,000	-	\$12,000
	<b>Subtotal</b>	<b>\$329,540</b>	<b>\$711,210</b>	<b>\$155,880</b>	<b>\$1,196,630</b>
	Contingency - 10%	\$32,954	\$71,121	\$15,588	\$119,663
	Overhead and Profit - 20%	\$65,908	\$142,242	\$31,176	\$239,326
	<b>Total for Items</b>	<b>\$428,402</b>	<b>\$924,573</b>	<b>\$202,644</b>	<b>\$1,555,619</b>

## Fundraising

In 2019, Norman Boudreau, a 40-year President of IC Credit Union, was introduced to Joseph Serio by Marcus Moran, due to their close friendship. Marcus, who spent 29 years on the Board of IC and held the position of Chairman for 10 years, was not only the founding sponsor for the Festival but also a loyal customer and business mentor of the Pharmacy since its purchase in 1989. Furthermore, Marcus provided invaluable assistance on the financial aspects of funding the Old Town Hall. After his passing, conversations with Norman revolved around preserving the building for the community and honoring Marcus by naming the building after him.

Norman, known to be one of the most successful fundraisers in Central Massachusetts and part of multimillion-dollar fundraising projects like the 3 million dollar Monty Technical Vet Tech School and Boys and Girls Club of Fitchburg and Leominster, embraced the idea wholeheartedly. His vast network, built over his 40-year banking career, includes individuals from the fundraising world. Sharing the dynamics of projects he had previously been involved in, Norman illustrated how money was raised and how donors often became involved when key individuals led the way. He suggested assembling a team and recommended William ‘Bill’ Aubuchon as a crucial member.

Bill, an owner of Aubuchon and a first cousin and best friend to Marcus, proposed bringing David McKeehan onboard as a right-hand man. David, boasting a 31-year tenure as president of the North Central Chamber and an eight-year veteran of leading the Detroit Historic District Commission, brought further expertise and connections to the team. The trio—Norman, Bill, and David—hold a wealth of connections in North Worcester County and are admired for their leadership and influence, especially in their relationship with Marcus Moran.

Marcus dedicated a lifetime of service to the region, serving on numerous boards and contributing widely. Notably, he was a trustee at Cushing Academy, Fitchburg State, President of the local Boys and Girls Club of Fitchburg/ Leominster, President and Campaign Chairman of the United Way and Directorships at Thayer Symphony. His extensive contributions to numerous other boards and organizations are noteworthy and expansive. This project presents an opportunity for the numerous companies and individuals he served to honor and remember him.

In the early months of last year, the Community Arts Foundation engaged in preliminary discussions about the Community Arts Center project with Norman Boudreau and Norman Gariepy. Norman Gariepy, the former Chairperson of the Board of Directors at IC Federal Credit Union, and Norman Boudreau, who served with distinction as the president of IC for 40 years, and both wish to honor Marcus, but they opted to hold their commitment for a future date contingent upon the Community

Arts Foundation securing the building.

## Community Contributions

Community Engagement:

**Partnership Development:** Forge alliances with local businesses and organizations to create a community network that supports the development and sustenance of the arts center.

Partner with a Land trust to create another organized arm of fundraising as North Quabbin Land Trust did with the Old Country Store in Petersham

**Volunteer Programs:** Launch a volunteer group inviting locals to volunteer in the efforts to transform the Old Town Hall in the Community Arts Center, thus embedding a sense of ownership and belonging among citizens.

Crowdfunding:

Engage in online crowdfunding platforms such as GoFundMe to allow not just the local, but the global community to partake in preserving and revitalizing the historic building.

## Capital Campaigns

Capital Campaign Strategy:

**Segmented Approach:** Identify and segment potential donors into categories: philanthropists, corporate donors, and small-scale donors, to approach them with tailored fundraising strategies.

**Leadership Giving:** Leverage Norman, Bill, and David's networks and spearhead the capital campaigns, ensuring that influential individuals and businesses are approached with tailored donor opportunities.

**Civic and Business Speaking tour:** Utilize the documentary we created on the Festival and Westminster that was dedicated to Marcus Moran. We would edit for length to feature Marcus. Watch it here. ([crackerfestival.com/film](http://crackerfestival.com/film))

**Naming Opportunities:** Offer naming rights for rooms and sections of the arts center to high-value donors as a recognition of their substantial contribution.

Recognition Wall: A dedicated wall within the arts center to acknowledge donors. Different tiers symbolize the scale of contributions.

## Marketing and Promotion

Leverage Historical Significance:

Use Fredrick Douglass' association with the Old Town Hall in promotional materials to create awareness with national, regional, and local history enthusiasts.

Develop exhibitions that explore the rich history of the hall, turning it into a tourist attraction which also serves as a continuous fundraising mechanism.

Multimedia Campaign:

Employ a diverse range of media - print and digital - to carry the narrative of the hall's resurrection as a vibrant performing arts center.

Share stories and testimonials of the impact that the preservation and transformation of the hall will have on the community.

## Community Outreach

Community Dialogues:

Organize forums that allow the community to voice their opinions and suggestions on the Old Town Hall redevelopment project.

Engage in a two-way dialogue, ensuring that the redevelopment caters to the authentic needs and desires of the community.

Collaboration with Local Artists and Historians:

Involve local artists and historians in the dialogue and planning to ensure the artistic and historical integrity of the redevelopment.

## Local Donations

Citizen & Business Involvement:



Micro-Donation Campaign: Initiate a campaign that encourages small-scale donations from locals and businesses, providing them with a platform to contribute towards preserving their heritage and future performance and gathering space.

Partnership with Local Businesses:

Form alliances with local businesses for mutually beneficial partnerships. This could involve sponsorship opportunities, hosting collaborative events, or establishing a ‘Business Friends of the Westminster Community Arts Center’ group.

**Conclusion**

The strategic framework for fundraising, presented above is guided by a vision that intertwines heritage preservation with community development. With robust capital campaigns, a well-orchestrated marketing strategy, inclusive community outreach, and localized fundraising initiatives, the redevelopment of the Historic Meeting House into a thriving arts center will not only preserve history but also infuse fresh cultural vitality into the heart of Westminster.

**Naming Rights Historic Meetinghouse**

As part of the Historic Meeting House funding raising noted above, we will model Easthampton’s successful naming rights campaign in the project as a part of our capital campaign. The numbers and additions to naming will be expanded based on the design of the interior. See below for naming rights associated with the building:

<b>Community Arts Center Property Feature</b>	<b>Capital Contribution</b>
Historic Meeting House Building	\$250,000
Auditorium	\$150,000
Entry Lobby	\$50,000
Elevator	\$25,000
Box Office	\$20,000
Restroom A	\$10,000
Restroom B	\$10,000
Garden A	\$10,000
Garden B	\$10,000

Auditorium Chairs (150 x \$600)	\$9,000
Individual Bricks Sidewalk (500x \$300)	\$18,000
<b>Total</b>	<b>\$562,000</b>

## Project Financing

### Phase 1 Restore to original design and add cellar foundation

Capital Partners	Contribution
Aubuchon Foundation	\$20,000
Bill Aubuchon	\$20,000
Joseph Serio	\$50,000*
Regional Capital Campaign/Joseph Serio	\$338,402**

\*\$25,000 pledge by Joseph Serio and a \$25,000 matching anonymous pledge.

\*\* up to \$250,000 guarantee on Capital Campaign if there were shortfallings

For further details on the pledges listed above, please refer to Appendices A, B, C, & D.

### Phase 2 Operational building 1st floor, 2nd floor, and basement

Capital Partners	Contribution
Regional Capital Campaign	\$250,000
Cultural Facilities Fund	\$100,000
Local Donations	\$100,000
Aubuchon Foundation	\$20,000
Shared Equity Mortgage	\$500,000

For further details on the mortgage listed above, please refer to Appendix E.

### Cultural Facilities Fund Grant

Community Arts Foundation will apply for a capital grant through the Massachusetts

Cultural Facilities Fund (CFF). The CFF was created through a stimulus bill passed by the Massachusetts State Legislature during the 184th Massachusetts General Court. CFF capital grants allow for a cultural facility's acquisition, design, construction, repair, renovation, rehabilitation, or other capital improvements. The capital grants are 1:1 cash matching up to \$200,000.

We spoke with the Cultural Facilities Fund (CFF) office of the Massachusetts Cultural Council early last year regarding our project proposal. Based on this conversation, we believe this project could be viable for a future grant cycle. Our application is planned to match the contributions we receive for phase 1 of this project.

The Cultural Facilities Fund capital grant provides a powerful tool to aid the Westminster Community Arts Center project through a public and private financing partnership. Ahead of the deadline for this grant, we expect to demonstrate the required community need for this community space through a survey of members of the Westminster community. Our team will also submit a Project Notification Form to the Massachusetts Historical Commission to be eligible for state funding for this project.

## Architectural Heritage Foundation

The CommunityArts Foundation has also spoken with the Architectural Heritage Foundation (AHF), whose first project was Quincy Market (Faneuil Hall). AHF works with communities to move historic preservation projects forward. They engage clients in a strategic process to bring neglected buildings and districts enhanced visibility, additional investment, and financial sustainability. We plan to further discuss AHF's subject matter expertise in our capital campaign and securing public funding for this project through grants.

Here is AHF President Sean McDonnell's email to Paul DeMoga Esq, who was one of the principal individuals involved in the resurrection of the Hanover Theater:

“Paul, This is the best project description for a project like this one I have seen in a while - His financing strategy, phasing, looks smart to me, and it appears he is ready to proceed- I assume Mr. Aubuchon is the guy in town you want on your team and he has a simple passion to preserve and restore a building critical to the character of his hometown Sean.”

## Phase 3 Finishing touches on building and property

Capital Partners	Contribution
Regional Capital Campaign	\$100,000
Local Donations	\$100,000

### Joseph Serio

Joseph Serio has been at the forefront of the development of the Westminster Center, owning Westminster Pharmacy for 34 years and chaired the Economic Development Committee since its inception in 2012. He has renovated two 1800-period barns and a total renovation of an 1840 home on Pleasant and Main. He created the first village zoning commercial project with Native Joe's Farmstand. Joseph also founded the Westminster Cracker Festival and Westminster Dog Show and is working on other projects to restore and revitalize downtown Westminster. He will provide \$50,000 in phase 1, which includes a \$25,000 anonymous pledge.

Furthermore, to support the Community Arts Foundation to preserve and restore the Historic Meeting House, Joseph will guarantee up to \$250,000 for any deficiencies in the Phase 1 Regional Capital Campaign with a goal of \$338,402.

### Financial Statement

Personal Financial Statement of Joseph Serio*	
As of 10/2/2023	
<u>Assets</u>	<u>Amount in Dollars</u>
<b>Cash</b>	
TD Bank Account 1	\$98,848
TD Bank Account 2	37,200
TD Bank Account 3	33,343
<b>Investments</b>	
TD Ameritrade Account	\$159,513
<b>Retirement Accounts</b>	
Equitable Account	\$16,725
Capital Group IRA	9,152

<b>Real Estate</b>	
134 Main Street, Westminster, MA	\$625,000
4 Pleasant Street, Westminster, MA	395,200
43 Slalom Lane, Franconia, NH (50% Owner) 451,000/2	225,500
128 Main Street, Westminster, MA	635,000
89 North Common Road, Westminster MA	449,000
<b>Notes Receivable</b>	
Note Receivable - Sale of Westminster Pharmacy	\$230,000
<b>Total Assets</b>	<b>\$2,914,481</b>
<b>Liabilities</b>	<b>Amount in Dollars</b>
<b>Long Term Liabilities</b>	
Mortgage on 134 Main Street, Westminster, MA	232,000
Mortgage on 89 North Common Road, Westminster, MA	122,000
Mortgage on 4 Pleasant Street, Westminster, MA	102,000
Mortgage on 43 Slalom Lane, Franconia, NH	105,000
TD Bank Home Equity Loan	67,504
SBA loan	150,000
<b>Total Liabilities</b>	<b>\$778,504</b>
<b>Net Worth</b>	<b>\$2,135,977</b>

\* I, Joseph Serio, hereby confirm that the amounts and values provided in this Personal Financial Statement are true and accurate representations of my financial position as of October 3, 2023. Supporting documents substantiating the account balances, fair market values, and other information reported herein are available and can be provided upon request for verification purposes.

For further details on Joseph Serio's Real Estate portfolio, please refer to Appendix G, Joseph Serio Property Asset Report.

## Yearly Building Income

Income Source	Amount
2nd Floor Apartment 1 Rent (\$2300/month)	\$27,600
2nd Floor Apartment 2 Rent (\$2300/month)	\$27,600
Dance Studio Rent (\$2500/month)	\$30,000
Basement Office Space 1 Rent (\$1600/month)	\$19,000
Basement Office Space 2 Rent (\$800/month)	\$9,600
Catering (\$500/event) (80 per annum)	\$40,000
<b>Total</b>	<b>\$153,800</b>

# Pro Forma Overview

## Annual Cash Flow

Year Ending	Year 0	Year 1 12/31/24	Year 2 12/31/25	Year 3 12/31/26	Year 4 12/31/27	Year 5 12/31/28	Year 6 12/31/29	Year 7 12/31/30	Year 8 12/31/31	Year 9 12/31/32	Year 10 12/31/33
<b>Opening Cash Flow</b>	90,000	43,330	381,732	177,830	942,770	57,611	125,098	37,990	156,589	278,349	403,371
<b>Acquisition Costs</b>											
Purchase Price		1									
Performance Bond	46,669										
Total Acquisition Costs	46,670										
<b>Operations</b>											
<b>Rental Revenue</b>											
Gross Apartment Rent		-	-	-	-	41,400	55,200	56,856	58,562	60,319	62,128
Gross Dance Studio Rent		-	-	-	-	22,500	30,000	30,900	31,827	32,782	33,765
Gross Office Space Rent		-	-	-	-	21,450	28,600	29,458	30,342	31,252	32,190
Concessions		-	-	-	-	-	-	-	-	-	-
Total Rental Revenue		-	-	-	-	85,350	113,800	117,214	120,730	124,352	128,083
<b>Event Revenue</b>											
Event Catering		-	-	-	-	30,000	40,000	41,200	42,436	43,709	45,020
Total Event Revenue		-	-	-	-	30,000	40,000	41,200	42,436	43,709	45,020
<b>Effective Gross Revenue</b>											
Gross Rental Revenue		-	-	-	-	85,350	113,800	117,214	120,730	124,352	128,083
Gross Event Revenue		-	-	-	-	30,000	40,000	41,200	42,436	43,709	45,020
General Vacancy		-	-	-	-	(4,268)	(5,690)	(5,861)	(6,037)	(6,218)	(6,404)
Credit Loss		-	-	-	-	(854)	(1,138)	(1,172)	(1,207)	(1,244)	(1,281)
Total Effective Gross Revenue		-	-	-	-	110,229	146,972	151,381	155,923	160,600	165,418
<b>Other Income</b>											
Regional Campaign Contributions		338,402	175,000	175,000	50,000	50,000	40,000	40,000	40,000	40,000	40,000
Local Donations		-	50,000	50,000	50,000	50,000	20,000	20,000	20,000	20,000	20,000
Ambuchon Foundation Pledge	20,000	20,000	20,000	-	-	-	-	-	-	-	-
Bill Ambuchon Pledge	20,000	-	-	-	-	-	-	-	-	-	-
Joseph Serio Pledge	50,000	-	-	-	-	-	-	-	-	-	-
Grant Income		-	-	100,000	-	-	-	-	-	-	-
Total Other Income	90,000	358,402	245,000	325,000	100,000	100,000	60,000	60,000	60,000	60,000	60,000
<b>Expenses</b>											
<b>Controllable</b>											
Repairs and Maintenance		-	-	-	-	6,000	6,150	6,304	6,461	6,623	6,788
Contract Services		-	-	-	-	13,000	13,325	13,658	14,000	14,350	14,708
Administrative		-	-	-	-	2,500	2,563	2,627	2,692	2,760	2,829
Advertising and Marketing		-	-	-	-	500	513	525	538	552	566
Payroll		-	-	-	-	-	-	-	-	-	-
Utilities		8,000	8,200	8,405	8,615	8,831	9,051	9,278	9,509	9,747	9,991
Fixed											
Property Taxes		-	-	-	-	-	-	-	-	-	-
Insurance		12,000	12,300	12,608	12,923	13,246	13,577	13,916	14,264	14,621	14,986
Property Management		-	-	-	-	7,000	7,210	7,426	7,649	7,879	8,115
Capital Reserves		-	-	-	-	-	-	-	-	-	-
Total Expenses		20,000	20,500	21,013	21,538	51,076	52,388	53,734	55,114	56,531	57,983
<b>Net Operating Income</b>		338,402	224,500	303,988	78,462	106,535	154,584	157,647	160,808	164,070	167,435
<b>Capital Expenditures</b>											
Major Cap Ex Projects		-	428,402	-	924,573	-	202,644	-	-	-	-
Total Capital Expenditures		-	428,402	-	924,573	-	202,644	-	-	-	-
<b>Net Cash flow from Operations</b>		338,402	(203,902)	303,988	(846,111)	106,535	(48,060)	157,647	160,808	164,070	167,435
<b>Financing Activities</b>											
Mortgage Proceeds		-	-	500,000	-	-	-	-	-	-	-
Debt Service		-	-	(39,048)	(39,048)	(39,048)	(39,048)	(39,048)	(39,048)	(39,048)	(39,048)
<b>Net Cash flow from Financing Activities</b>		-	-	460,952	(39,048)	(39,048)	(39,048)	(39,048)	(39,048)	(39,048)	(39,048)
<b>Closing Case Balance</b>	43,330	381,732	177,830	942,770	57,611	125,098	37,990	156,589	278,349	403,371	531,758



## Qualifications

### William (Bill) E. Aubuchon, III Executive Director, Capital Planning

William brings extensive leadership experience to the team, having served as Chairman and CEO of Aubuchon Hardware from 1993-2010 and continuing as Chairman from 2011-2015. A seasoned business owner in Westminster, William possesses insights into capital planning and executive management.

#### Experience

- Chairman and CEO, Aubuchon Hardware (1993-2015)
- Westminster Business Owner

### Joseph P. Serio President, Project Management

Joseph P. Serio's longstanding commitment to the community of Westminster and his entrepreneurial spirit drives our project management endeavors. As the former owner of Westminster Pharmacy and the founder of the Westminster Cracker Festival, he has demonstrated an enduring commitment to local economic development and community engagement.

#### Experience

- Former Owner, Westminster Pharmacy (1989-2023)
- Chairman, Westminster Economic Development Committee (2013-2023)
- Founder, Westminster Cracker Festival (2015-present)
- Creator, Westminster Dog Show, Outdoor Sculptures
- Westminster Resident

#### Highlighted Restoration Projects

1. 4 Pleasant Street, Westminster:  
Total restoration of an 1840 house included meticulous attention to preserving hardwood floors, doors, and hardware. The property received extensive updates, meeting current load requirements and involving innovative engineering solutions.

Contributors: Jack Ryan (Architect), Jon Moore (Contractor)

2. 134 Main Street, Westminster (Native Joe's):

The 1825 Barn underwent a comprehensive restoration, maintaining period aesthetics and integrating modern amenities, resulting in a dynamic and sustainable farmstand.

Contributors: Jack Ryan (Architect), Jon Moore (Contractor), Michelle Cote (Landscape), Todd Griffin (Stone Mason)

3. 89 North Common Rd, Westminster:  
The 1897 chestnut timber frame barn was meticulously restored, balancing modern features with original aesthetics to create an art studio and performing arts space. The project included advanced insulation and HVAC systems ensuring high-efficiency heating and cooling.

Contributor: Jon Moore (Contractor)

## David M. McKeehan

### Special Advisor, Historic Preservation

With a career spanning over three decades in civic leadership and historic preservation, David M. McKeehan is an invaluable asset to our initiative. As a former President and CEO of the North Central Chamber of Commerce and Chairman of the Detroit Historic District Commission, he brings extensive experience in historic preservation.

#### Experience

- President & CEO, North Central Chamber of Commerce (1984-2015)
- CEO, Visit North Central Massachusetts (1990-2015)
- Chairman, Detroit Historic District Commission (until 1984)
- Westminster Resident

## Von Salmi

### Project Management, Architecture & Construction

Von Salmi, with his diverse background in architecture and construction management leadership, has been pivotal in leading many complex high-level architectural initiatives during his distinguished career. A member of the American Society of Landscape Architects, he excels in designing, implementing, and advising innovative architectural solutions.

#### Experience

- Various Leadership Roles in the Architecture and Construction Industries
- Member, American Society of Landscape Architects

- Former Chairman, Upton Building Committee
- Westminster Resident

### Highlighted Restoration Projects

1. Alves House, 2 Old Worcester Rd:  
Designed an intricate addition for the oldest home in Westminster, dating back to 1756.
2. VFW 3 Eaton Street:  
Spearheaded the conversion of a truss roof and storage addition from a flat roof to a gable-roofed system.
3. Personal home, 41B Bacon Street, Westminster, MA:  
Conceived and executed the design and construction of a replicant Bow Roof House.

For further details on qualifications and experience, please refer to Von Salmi's Curriculum Vitae in Appendix H.

### Thomas J. Arsenault Director, Strategy & Policy

Thomas provides strategic foresight and policy expertise, driving our initiatives with his extensive experience in legislative reform, policy advisement, and strategy consulting. His analytical insights, coupled with business and governmental acumen are crucial in navigating the complexities of this project.

### Experience

- Government Relations and Public Policy, United States Postal Service (2020-present)
- Policy Advisor, United States Senate – Senator Kyrsten Sinema (2019)
- Masters of Business Administration, Arizona State University (2020)
- Risk Consulting, PricewaterhouseCoopers (2014-2018)
- Bachelor of Business Administration, University of Massachusetts (2014)
- Former long-time Westminster Resident

### Highlighted Strategic and Public Policy Project Experience

1. Worked with Congress on the successful passage of the landmark Postal Service Reform Act of 2022, facilitating significant reform to the United States Postal Service.

2. Co-authored "Marvin: A Personalized Telehealth Approach to Mental Health," a case study published by Harvard Business School.
3. Developed and operationalized state-wide prevention services for Arizona's childcare services, adhering to federal mandates under the Family First Prevention Services Act (FFPSA).

For further details on qualifications and experience, please refer to Thomas J. Arsenault's Resume in Appendix J.

## David Turcotte

### Advisor, Architecture

David Turcotte brings extensive architectural expertise and a strong understanding of historic preservation. His experiences with Mt. Vernon Group since 2001 have refined his architectural approach, integrating historical authenticity with contemporary needs.

### Experience

- Architect, Mt. Vernon Group (2001-present)
- Bachelor of Science in Historic Preservation, Roger Williams University
- Former Member, Upton Building Committee
- Westminster Resident

### Highlighted Restoration Projects

1. Cabot House Museum, Beverly, MA (1781):  
Preserved the Georgian-style three-story brick mansion, maintaining its historical essence.
2. Sarah M. Gilmore Academy /K-8 Schoolhouse (1899):  
Restored the Romanesque-style building, featuring a 288-seat theater, catering to 500 students.

For further details on qualifications and experience, please refer to David Turcotte's Biography and Resume in Appendix I.

## Price Proposal

See attached fully executed Purchase Price Proposal Form.

## References

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## Description of Project

### Proposed Use of Property

#### Compliance with Project Goals

**A use that can integrate seamlessly into the Village Center and the Bacon Street/Pleasant Street/Main Street neighborhood.**

The Historic Meeting House has been a good neighbor to the neighborhood in the 160 years it was open. A partner in the project owns both abutting buildings on Main Street and will create a pedestrian pattern that would flow towards Main Street. Parking for the building will not be permitted on the residential side of Pleasant Street or Bacon Street past Pleasant Street.

**A use that will preserve the historic appearance of the Historic Meetinghouse.**

The Historic Meeting House will be restored to its original design as it was in 1839. It will have a lower prominence on Bacon Street than the existing building, bringing it

into continuity with the residential scale of the surrounding neighborhood. The auditorium will now be on the ground level, giving great accessibility to the building and better egress from the building to direct foot traffic away from the neighborhood.

**A use that will stimulate other desirable economic, social and cultural development in Westminster's Village Center.**

The building will be a cultural forum for plays, movies, social gatherings, Westminster Cultural Council, Westminster Historical Society, and civic organizations that wish to use the centrally located building. Residents and people from the region will dine and gather at restaurants before and after events at the Meeting House and shop at other businesses while they are here.

It will also bring more businesses to our community, as demonstrated in other communities. Create the arts in your community, and business will follow. The mill town of Easthampton is a prime example of that. They developed mill space for artists, and the people came. Business followed in the form of restaurants, bakeries, gifts, coffee, and other unique shops.

To be a thriving town, you must continually develop ways to attract people to your community. That is what makes a town with tourism successful. Those towns have many more goods and services than similar populations because the transient daytime population creates greater demand for the local economy. We also have one million people who recreate five minutes away at Wachusett Mountain every year. The Community Arts Center will give them reasons to visit our town.

**A use that Westminster residents will consider as an asset to the Village Center and the Town as a whole.**

Residents can gather and interact in their community in a historical setting. The success of the Cracker Festival, Neighbors Helping Neighbors, and the Farmers Market is for the town to come together with events each year. The limitation is they are outdoor events and seasonal. There is an opportunity to continue events throughout the year through the use of this building.

Many nonprofits participate in the Cracker Festival each year to raise money. Neighbors Helping Neighbors, Historical Society, Circle of Artists, Agricultural Society, Knights of Columbus, Westminster Cultural Council, Boy Scouts, and Girl Scouts. The Historic Meeting House gives them a space to create ways for funding the entire year.

**A use that will be in keeping with the scale and appearance of uses typically found in historic New England village centers.**

The Historic Meeting House will be restored to its original design as it was in 1839. It will have a lower prominence on Bacon Street than the existing building, bringing it into continuity with the residential scale of the surrounding neighborhood.

## Compliance with Selection Criteria

### **1. Qualifications and experience of the proposer on completing similar historic preservation projects.**

3 points - Highly Advantageous:

A proposer that has completed 3 or more similar historic preservation projects shall be highly advantageous.

#### **Justification for Highly Advantageous Rating:**

Our team, with its diverse and exceptionally skilled members, rightfully deserves a rating of "Highly Advantageous" in the sphere of historic preservation projects. Below are detailed narratives substantiating our self-rating:

#### **Extensive Experience & Qualifications**

David M. McKeehan, a leader with extensive experience in Historic Preservation, possesses over thirty years of substantial work in civic leadership and historic preservation, including a stint as the Chairman of the Detroit Historic District Commission. His unparalleled knowledge in historic preservation, especially his involvement in the Detroit Historic District Commission, places us in an advantageous position to navigate similar projects efficiently.

David Turcotte, an architect with the Mt. Vernon Group since 2001, specializes in the meticulous integration of historical authenticity with contemporary needs. His extensive expertise is demonstrated in the restoration of the Cabot House Museum and the Sarah M. Gilmore Academy, which houses a 288-seat theater, highlighting our proficiency in managing theater-related restorations effectively.

#### **Proven Track Record in Restoration Projects**

Our team has successfully completed various restoration projects, maintaining period aesthetics and integrating modern amenities. Three highlighted restoration projects in Westminster alone have centered around structures built in the 1800s, such as:

- 4 Pleasant Street, an 1840 house, restored meticulously preserving essential historical elements.
- 134 Main Street, an 1825 Barn, underwent comprehensive restoration, enhancing its sustainability.
- 89 North Common Rd, a 1897 timber frame barn, restored, balancing modern features with original aesthetics to create a gallery and performance space..

#### **Specialized Skills and Diverse Backgrounds**

Von Salmi brings extensive experience in architecture and construction management leadership and has been instrumental in several high-level architectural initiatives.



His specialized work in projects like the Alves House addition emphasizes our capabilities in handling structures dating back to the mid-1700s, enhancing our adaptability and proficiency.

William E. Aubuchon, III has extensive leadership experience and profound insights into capital planning and executive management, ensuring seamless executive advisory oversight over the project.

Joseph P. Serio, our Managing Director of Project Management, has demonstrated unwavering commitment and entrepreneurial spirit, highlighting our team's dedication to community development and local economic enhancement.

Thomas J. Arsenault, with his rich experience in legislative reform, policy advisement, and strategy consulting, empowers our project with strategic foresight and governmental acumen, ensuring the smooth navigation through the project's business and public policy landscapes.

#### Local Presence and Commitment

Many of our team members are Westminster residents or have long-standing ties to Westminster, showcasing our dedication and commitment to the local community and ensuring a nuanced understanding of local contexts, needs, and preferences.

#### Comprehensive Approach to Historic Preservation

Our team's approach to historic preservation is holistic, balancing historic accuracy with modern necessities and sustainability. This balance is evident in our past projects, which have skillfully maintained the historical essence while catering to contemporary needs and regulations.

#### Conclusion

Given the extensive qualifications, diverse experience, successful track record in restoration of historic structures, specialized skills in historic preservation, and a deep commitment to the local community, we firmly believe that our proposal meets and exceeds the criterion for a "Highly Advantageous" rating for completing similar historic preservation projects, particularly with a focus on structures like the town hall built in 1839 with a 150-seat theater.

## **2. Financial feasibility and viable business plan.**

3 points - Highly Advantageous:

a. A proposal that has a business plan that clearly demonstrates a sound financial strategy for the Project, together with estimated redevelopment costs, a schedule of operating income, an expense proforma, and the proposed method of financing shall be highly advantageous.

### **Justification for Highly Advantageous Rating:**

Under the ambit of "Financial Feasibility and Viable Business Plan," our project confidently positions itself to merit a "Highly Advantageous" rating, and here's the rationale supporting this assertion:

#### **Comprehensive Business Plan and Financial Strategy:**

The proposal for the Community Arts Center in the Historic Meeting House is buttressed by an exhaustive and well-detailed business plan, incorporating a precise financial strategy. The robust plan manifests a methodical approach to operational and financial aspects, presenting a solid financial footing for the project. This in-depth detailing demonstrates a clear vision and an understanding of the economic dimensions of this project, which is integral to achieving long-term sustainability and success.

#### **Detailed Cost and Income Assessment:**

The proposal meticulously outlines the estimated redevelopment costs and a diversified income stream that includes rental income, community contributions, grants, and strategic partnerships. With estimated total annual income marked at around \$150,000, it reflects a solid understanding and assessment of both income and expenditure, ensuring that the project is grounded in financial realism and viability.

#### **Strong and Diversified Revenue Streams:**

The financial plan articulates multiple, diversified revenue streams that encompass residential, commercial, and communal spaces, thereby minimizing financial risk and fostering resilience. The rental income, performance and event income, and community contributions and grants are all indicative of a well-rounded financial strategy, ensuring steady cash flow and financial stability for the project.

#### **Structured Phased Approach and Fund Allocation:**

The phased approach to restoration, operations, and promotions, and the structured allocation of funds across different project phases, highlight the project's strategic financial planning. This approach allows for risk mitigation and ensures the availability of adequate funds before commencing each phase, reflecting financial prudence and strategic execution.

#### **Clear Financial Projections and Risk Strategy:**

The detailed financial projections and comprehensive financial risk strategy outlined in the proposal signify financial foresight and due diligence. The proposal underscores the commitment to prudent cost management, diversified income streams, community partnerships, and strategic marketing, all aimed at optimizing financial performance and ensuring the long-term viability of the Center.

### Strategic Marketing and Branding:

The comprehensive marketing and sales strategy focusing on branding, community outreach, tourism, and partnerships is poised to promote the Historic Meeting House effectively, ensuring its successful positioning as a community, cultural, and historical hub. This strategic marketing, combined with diversified strategies focusing on unique selling propositions and community engagement, ensures sustainable financial success and widespread recognition of the property.

### Comprehensive Cash Flow Statement:

The inclusion of a detailed 10-year annual cash flow statement encapsulating operating and financing activities showcases a commitment to transparency and financial clarity. This detailed cash flow is integral in demonstrating how funds will be allocated to various aspects like restoration, operations, and promotions, affirming the financial robustness of the project.

### Potent Fundraising Leadership:

Leveraging the expertise and networks of Norman Boudreau, William ‘Bill’ Aubuchon, and David McKeehan, alongside honoring the legacy of Marcus Moran, our project amalgamates formidable experience and community respect to anchor our fundraising strategy.

### Community and Institutional Engagement:

Initial talks with entities like the Aubuchon hint at future financial partnerships, which will be deepened upon securing the building. Engaging community through partnerships, volunteer programs, and crowdfunding will also be pivotal in amplifying financial and participative support.

### Dynamic Capital Campaign:

The campaign will employ a segmented donor approach, offering naming rights and creating a donor recognition wall to celebrate contributions of all magnitudes. This aligns with our principle of recognizing and valuing every supporter, from individual community members to corporate entities.

### Harnessing Local Contributions and Alliances:

Through micro-donation campaigns and welcoming in-kind donations, every local will have the opportunity to be part of the project. Additionally, structured alliances with local businesses will not only foster financial support but also create mutually beneficial opportunities.

### Conclusion:

In conclusion, the careful financial planning, diversified revenue streams, clear cost and income assessments, detailed financial projections, community engagement, and strong marketing strategies presented in the proposal validate the rating of “Highly Advantageous” for the Financial Feasibility and Viable Business Plan criterion. The approach in presenting every financial aspect of the project reflects not only its feasibility but also its potential success and enduring impact on the community.

### **3. Compatibility of project with the historic nature of the Town Hall that emphasizes preservation and maintenance of the historic structure.**

3 points - Highly Advantageous:

A proposal that emphasizes preservation of the exterior features including windows, façade, maintenance of the existing brick and clapboards; and also preserves any important interior features such as the stage shall be highly advantageous.

#### **Justification for Highly Advantageous Rating:**

The comprehensive restoration of the Historic Meeting House we propose aligns with the central criterion, emphasizing reverence for the preservation and maintenance of the historic structure. We aim to restore the Historic Meeting House meticulously, resurrecting its original architectural heritage and structural integrity, including the significant reinstatement of the stage from the second floor to the first floor, in alignment with its authentic original design.

#### **Exterior and Interior Preservation:**

Our proposal fervently emphasizes the preservation of vital exterior features, including the façade, and the maintenance of the existing clapboards, ensuring the historic aesthetic is uncompromised. Furthermore, interior features, notably the stage, will be painstakingly preserved, mirroring the original architectural essence and purpose of the Town Hall.

#### **Holistic Historical Preservation Approach:**

Our commitment to historical preservation transcends mere structural conservation. It involves a holistic approach, striking a meticulous balance between historical accuracy, modern necessities, and sustainability. Our experience in prior projects substantiates our capability to intertwine the essence of history seamlessly with contemporary needs and regulations, thus maintaining historical essence and catering to present-day requirements and standards.

#### **Significance and Community Impact:**

The emphasis on historical preservation is crucial due to the Town Hall’s symbolic representation of community discussions on fundamental rights and rectification of historical injustices. The restoration ensures that this emblematic edifice continues to serve as a living testament to history, perpetuating its role as a forum for civic

engagement and discussion, thus enabling present and future generations to engage with the history and legacy of the building.

#### Structural Integrity and Authentic Restoration:

Our meticulous plan incorporates restoration endeavors that align with historical accuracy, including the removal and reconstruction of the 20-foot addition and the implementation of a secure concrete foundation. These measures are pivotal in maintaining the structural integrity of the building, originally constructed in 1839, while ensuring the restoration resonates with the architectural nuances of the period.

#### Enhanced Accessibility and Community Integration:

The relocation of the stage from the second floor to the first floor not only aligns with the original design but significantly improves accessibility. The restoration efforts are underpinned by the objective to reintegrate the Town Hall as the communal nucleus, facilitating a diverse array of activities and engagements. This serves as a testament to our unwavering commitment to restoring the Historical Meeting House to its original design, thus revitalizing its role as the community's epicenter.

#### Touristic and Educational Implications:

Our project is also oriented towards accentuating the Town Hall's historical significance, including its association with leaders like Frederick Douglass. This aspect has vast implications for tourism, education, and community engagement, serving as a focal point for visitors to explore and understand the critical facets of our history.

#### Investment and Commitment:

With an investment of 1.55 million dollars, our commitment to the restoration project is unwavering. The restoration efforts are not merely structural but are deeply intertwined with the objective of reviving the community's historical, cultural, and civic engagements, thus ensuring the Town Hall resumes its esteemed role in the community fabric.

In conclusion, our project distinctively qualifies as Highly Advantageous by ensuring meticulous preservation of both exterior and interior historic features, emphasizing a comprehensive approach to historical preservation, enhancing community engagement, and making substantial investments to ensure the Town Hall's historic essence is seamlessly blended with contemporary needs.

#### **4. Quality of the proposed conceptual site plan**

3 points - Highly Advantageous:

a. A conceptual site plan that shows, in detail, the building, parking and circulation areas, and landscaping techniques to protect and enhance the surrounding environment and neighborhood shall be highly advantageous.

##### **Justification for Highly Advantageous Rating:**

Given the depth and breadth of our proposal for the restoration of the historic town hall, we firmly believe that our conceptual site plan significantly aligns with the “Highly Advantageous” category as defined in the selection criteria, owing to the detailed attention given to the building, parking and circulation areas, and landscaping techniques to protect and enhance the surrounding environment and neighborhood.

##### **Detailing of Building:**

David Turcotte, our Advisor in Architecture, has meticulously designed the interior floor plans, ensuring that the restored building retains its historic charm while accommodating modern needs. His experience in historic preservation is exemplified by the seamless integration of historical elements with modern functionalities in the conceptual designs for all floors, including transformative redesigns and the creation of rentable office spaces and stylish apartments, all while maintaining historical authenticity and ensuring accessibility.

##### **Parking and Circulation Areas:**

Our proposal thoroughly addresses the critical aspect of parking by combining a new parking lot, street-side parking, and dedicated tenant parking, in full compliance with local regulations, ensuring smooth circulation and accessibility for daily activities and events. This thoughtful consideration to parking is reflective of our understanding of the local landscape and is intended to support and enhance economic activities in downtown Westminster.

##### **Landscaping Techniques:**

Von Salmi, our expert in Architecture & Construction with a background in landscape architecture, has thoughtfully considered the landscaping aspect of the project. The planting of maple trees not only resonates with the historic essence of the main street but also enhances the aesthetic and environmental quality of the neighborhood. The incorporation of the Spanish War Memorial in our site plan acknowledges its historic significance in our community. Additionally, the inclusion of a lawn panel and patio seating provides versatile spaces for the community to engage in various activities, reinforcing our commitment to creating communal spaces that are both functional and harmonious with the environment.

##### **Environmentally Conscious Approach:**

The landscape design also focuses on creating sheltered and intimate spaces, thereby fostering community interaction and engagement. The lawn panel and post and beam pavilion are nods to the historical framework of the meeting hall, providing multifunctional spaces for various community events while enhancing the site's overall environmental and aesthetic value.

#### Community Centric:

Our conceptual site plan goes beyond mere aesthetics and functionality. The provision of free wifi in patio seating areas and the acknowledgment of the Spanish War Memorial are examples of our nuanced approach to creating a space that is deeply rooted in community values, history, and needs. The attention given to the creation of communal spaces aims to encourage community interaction, engagement, and the fostering of local culture and heritage.

#### Enhancement of Neighborhood:

The thoughtful design of the parking and circulation areas is purposed to ensure that the restored town hall does not disrupt but rather enhances the existing neighborhood structure. The combination of historical aesthetics with modern conveniences in our conceptual designs aims to revitalize the town hall and its surroundings, making it a landmark of historical and contemporary significance.

#### Collaboration:

Our proposal is aligned with the community's preferences and needs. Our approach is deeply collaborative, seeking to work in harmony with the local groups and the community to bring about a transformation that is mutually beneficial and sustainable.

In conclusion, given the comprehensive and thoughtful approach reflected in our proposal, focusing on preserving history, enhancing community interaction, ensuring functionality, and improving the environmental and aesthetic value of the surroundings, we believe that our project is justified to be rated as “Highly Advantageous” in terms of the quality of the proposed conceptual site plan.

## Proposed configuration of the interior space

### Basement

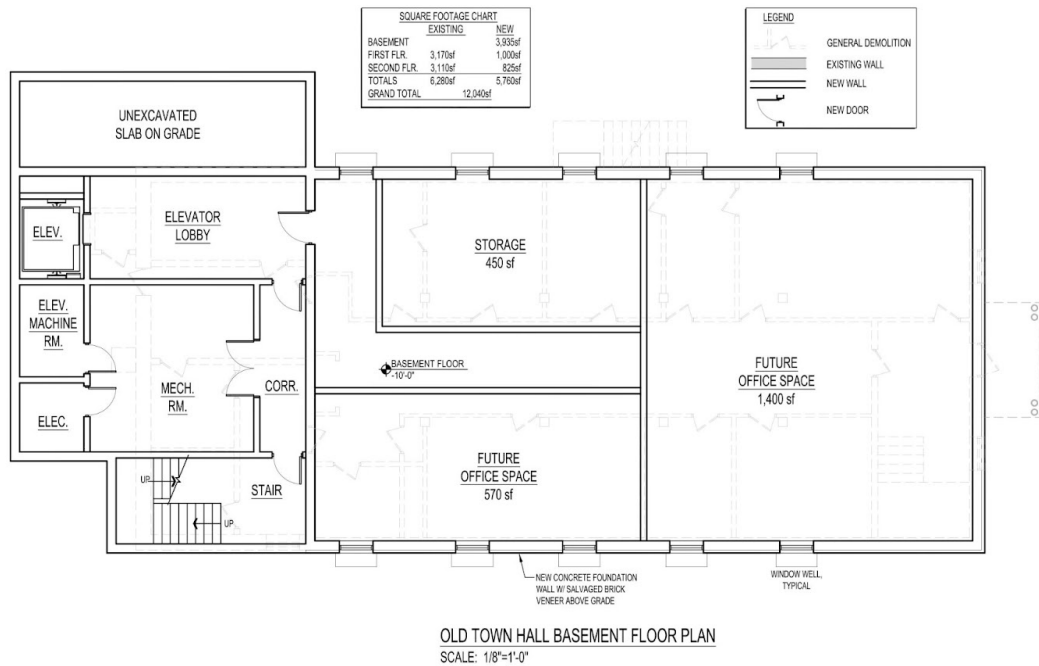
The newly developed basement level of the Community Arts Center is designated to accommodate the vital mechanical, elevator machine, and electrical rooms, ensuring the seamless operation of the building's various facilities and services. The meticulous planning and execution of this space focus on integrating functionality with aesthetics, to align with the rich history and architectural essence of the Community Arts Center.



The floor plan includes two key offices, which form the foundation for two revenue-generating spaces outlined in our project blueprint, playing a crucial role in meeting the financial goals set in our strategic plan.

These spaces will be available for rent to professionals seeking a unique working environment and will also be reservable for civic organizations within thCommunity-Centric initiative aims to foster collaboration, engagement, and a sense of communal interaction, reinforcing the Community Art Center’s role as a hub for civic dialogue and cultural exchange.

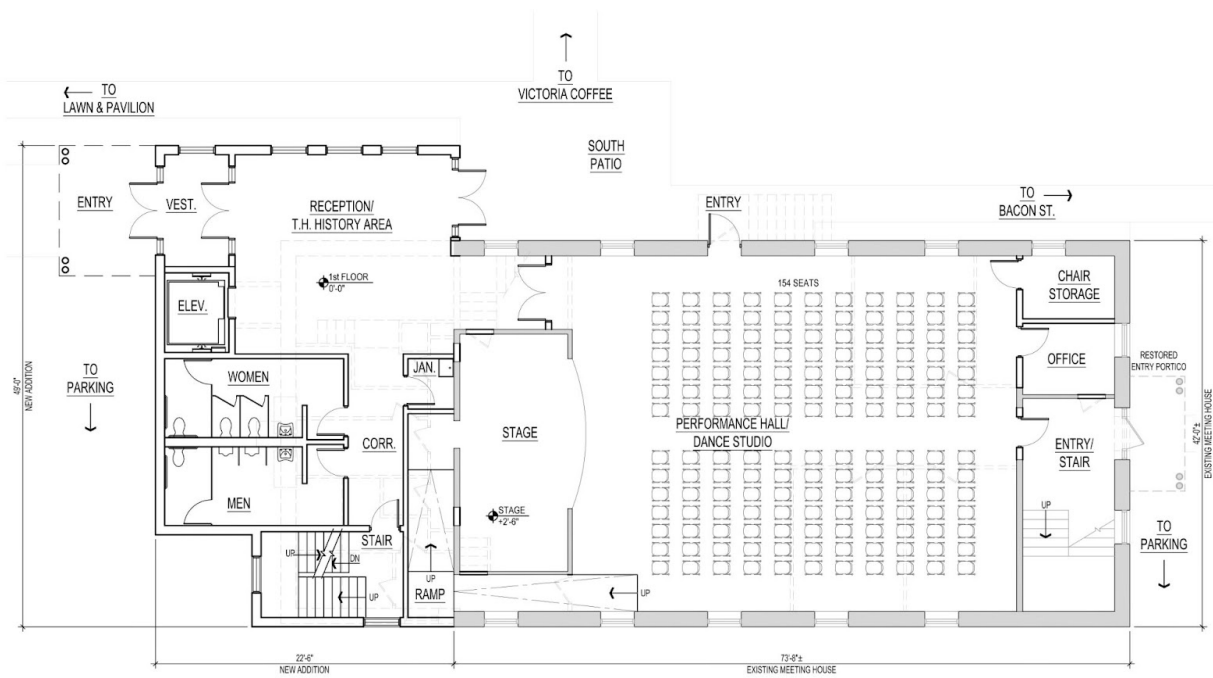
By offering this multifunctional space, we aspire to create a harmonious balance between preserving the historic significance of the Community Arts Center and introducing contemporary amenities, thereby contributing to the evolving cultural tapestry of the community.



## First Floor

The Community Arts Center will feature the stage and performance hall on the first floor, allowing seamless accessibility. Both front and side exits are strategically located on the Main Street side, offering optimal convenience to visitors. The side exit, detailed with a well-marked walkway, navigates individuals through the eclectic environment of Victoria Coffee, extending towards Bacon Street and finally to Main Street, ensuring a continuous flow of pedestrian traffic.

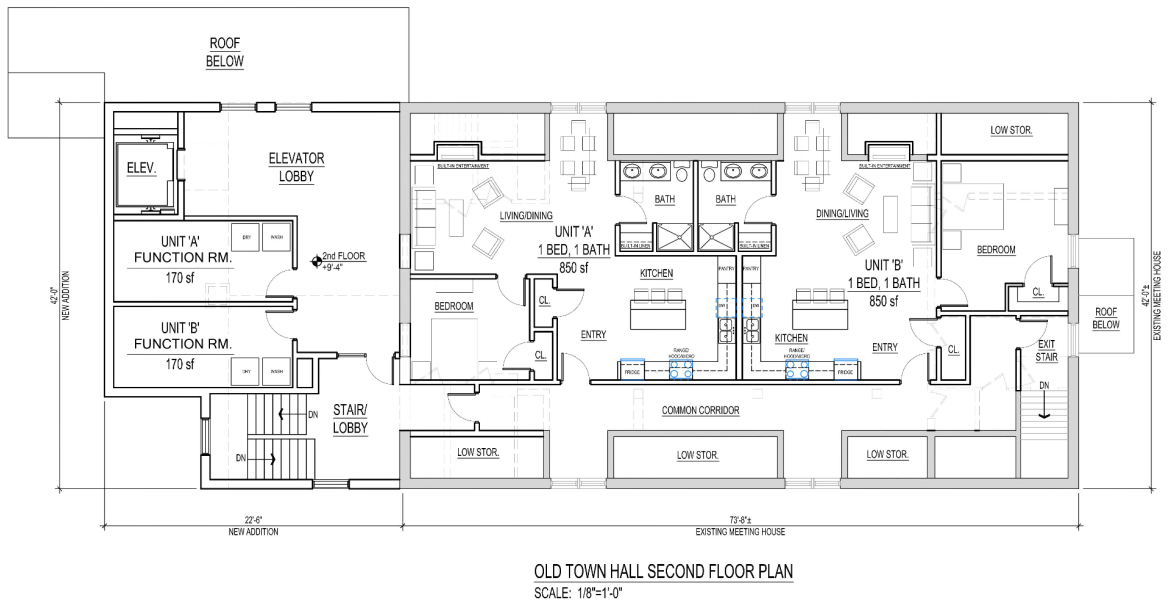
Located at the back south corner of the building, a secondary entrance and exit are dedicated to being fully accessible, catering specifically to the needs of disabled patrons, ensuring inclusivity and ease of access within the center. This particular section of the building will also house a reception room decorated to pay homage to Westminster’s rich and diverse history. This room serves not only as a warm greeting space but also as a visual journey through time, allowing visitors to immerse themselves in the unique history and culture of Westminster.



OLD TOWN HALL FIRST FLOOR PLAN  
SCALE: 1/8"=1'-0"

## Second Floor

Embracing a harmonious balance between historical splendor and contemporary convenience, the second floor of the Historic Meeting House is set to undergo a meticulously crafted transformation. Envisaging a living space where the past and present converge seamlessly, two apartments will be introduced, each radiating with the building’s intrinsic, timeless charm. Through an elegantly appointed redesign, the heart of this floor will metamorphose into generously proportioned living spaces where the echoes of bygone eras whisper through modern comforts. Furthermore, an addition to the rear will present future residents with an elevator. Prospective dwellers can anticipate a living experience where the luxury of today’s amenities coexists effortlessly with the enchanting allure of the Meetinghouse’s storied past.



## Compliance with Historic Preservation Restriction

Our team, composed of experienced leaders in community and historic preservation, has reviewed the Preservation Restriction Agreement provided by the Town of Westminster. We are fully cognizant of the significance of the Historic Meetinghouse, not only as a sterling example of Greek Revival architecture but also as a repository of local, state, and national history. We commit to the imperative of preserving the structural integrity and historical authenticity of the building's exterior in alignment with the provisions detailed in the agreement.

### Restoration and Modification:

We respect the imperative to maintain the property in a state that is congruent with its historical significance. As such, we propose to undertake diligent restoration initiatives, including the removal of the first floor of the building as the original plan. Also to remove and rebuild the 20-foot addition, as suggested by the 2002 McGinley, Hart & Associates report. These modifications aim to revert the building closer to its original form and reinforce its structural stability.

The reconstruction of the removed addition will adhere strictly to the architectural style and materials corresponding to the period of the building's inception. Our team will leverage architectural research and historical records to ensure the authentic replication of the building's original features, maintaining the period-appropriate aesthetics and preserving the visual integrity of the building. Every modification and

restoration effort will be communicated and approved by the Massachusetts Historical Commission and the Town to ensure adherence to historical accuracy and preservation values.

#### Maintenance and Preservation Commitment:

We affirm our commitment to maintaining the exterior of the Historic Meetinghouse in a condition that is both structurally sound and aesthetically congruent with its original design and features. Our maintenance initiatives will involve regular inspections and conservation activities to prevent degradation and ensure the long-term preservation of the building's historical features. Any required replacements or repairs will be executed with materials and techniques that are historically appropriate, in accordance with the Secretary's Standards and will be submitted for approval from the relevant authorities in adherence to paragraph 3.2 of the Preservation Restriction Agreement.

#### Compliance with Prohibited Activities:

We commit to stringent adherence to the prohibited activities listed in the Preservation Restriction Agreement. The building will not be relocated, demolished, or altered in any manner not pre-approved by the Grantee and other relevant authorities. We will also ensure that the monument to the Spanish-American War remains undisturbed.

#### Archeological Considerations:

We acknowledge the potential historical importance of undiscovered artifacts on the property. Thus, any archeological activities, including surveys or excavations, will be conducted in strict alignment with the Massachusetts Historical Commission's guidelines, and any findings will be duly reported to the State Archeologist.

#### Final Thoughts:

We profoundly respect the rich tapestry of history that the Historic Meeting House represents. Our interventions will be meticulously planned and executed to preserve this historical gem for future generations, ensuring that every layer of its storied past is treated with reverence and care.

This proposed project is not merely a restoration but a homage to the cultural, moral, scientific, and literary heritage of Westminister. We are excited at the prospect of contributing to the revitalization of this landmark, ensuring it continues to be a beacon of community engagement and historical reflection, embodying the diverse narratives that have shaped Westminister.

## Parking

The Westminister Community Arts Center requires sufficient parking to accommodate daily activity. The newly built parking lot on the building side of Pleasant Street will meet these requirements. The side parking lot will include public parking with

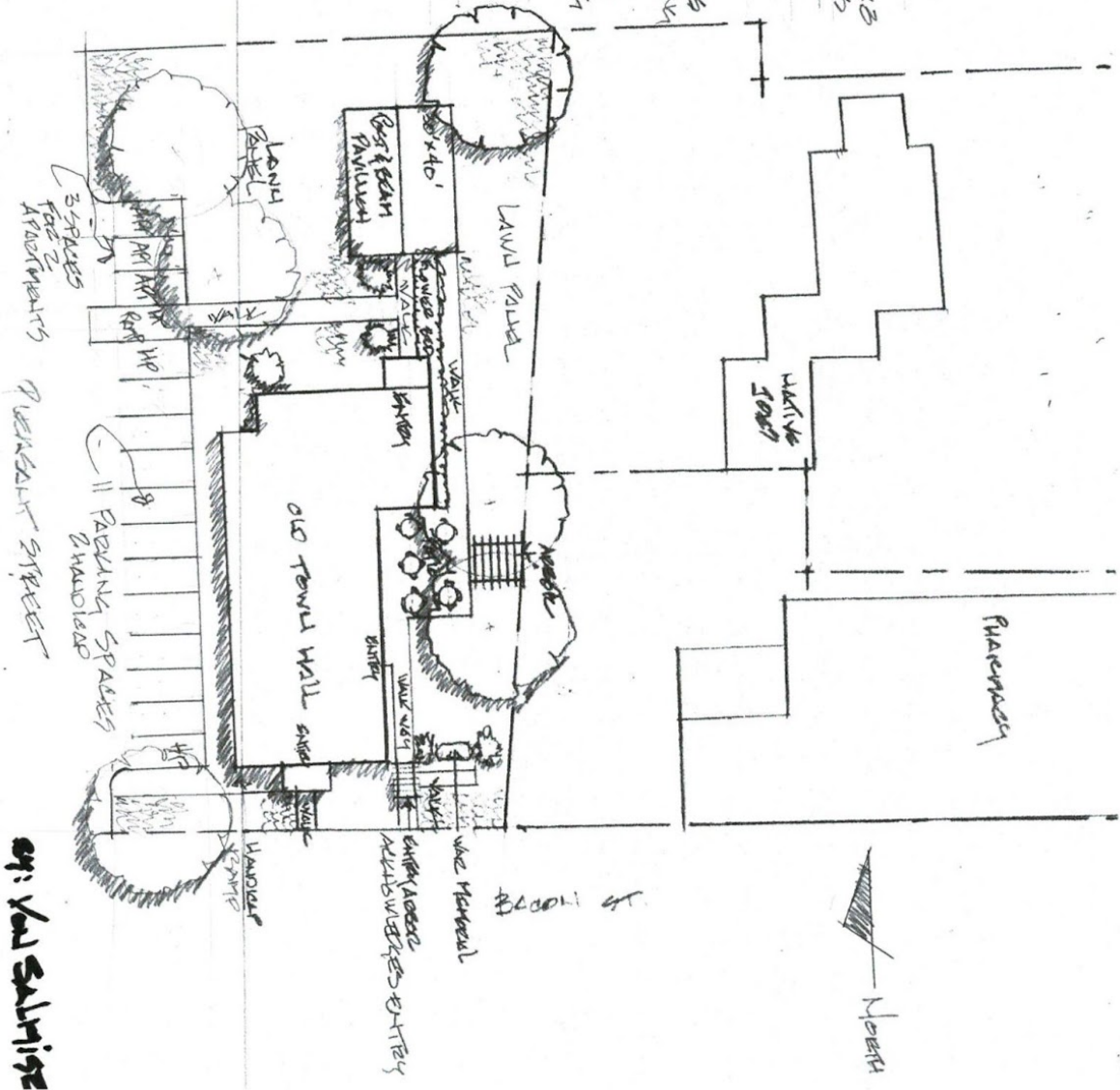
handicapped spaces and dedicated tenant parking for the apartments in the Community Arts Center.

Much of the event parking would be on Main Street, which is customary for fairs, funerals, festivals, town-wide yard sales, and any event that brings people to downtown Westminster. Contrary to some people's belief, parking has always been allowed in the twenty-two communities on the "Main" streets that the 2A passes through. It is up to the local municipalities to govern areas where parking might pose a hazard. In the words of the State, the ban on parking on the Main Streets of secondary highways would be an economic disaster.

# Exterior landscaping design

Conceptual Site Plan for  
 Historic Meeting House  
 Community Arts Foundation  
 SALE: 1" = 40' DATE: 9/25/23  
 Shows the location of parking  
 spaces to be added when Main St.  
 was road widened  
 The addition was Memorial is  
 acknowledged  
 The Post and Beam Pavilion  
 to the rear of the existing  
 hall & the existing community  
 hall & the Post and Beam  
 Pavilion are a  
 scheduled Public Area & parking  
 at a Musical Venue.  
 The patio seating provides an  
 intimate space for coffee  
 and meetings w/ stage w/ ft.

## Conceptual Site Plan





## Readiness and ability to proceed on the Project

We are well-positioned and equipped to embark on the redevelopment of the old Westminster meeting house promptly and efficiently, given our substantial financial backing, experienced leadership, and partnership with esteemed professionals in the restoration field.

### Financial Stability:

We have secured the majority of the funding required for phase 1 and are actively engaged with renowned fundraisers in the region to ensure the availability of additional funds. These fundraisers have previously contributed to the success of notable projects, including the Monty Tech Veterinary School and the Boys and Girls Club of Fitchburg.

Our robust financial strategy includes a clear pathway for financing phase 2, incorporating a \$500,000 shared equity mortgage, pledged funds, and proceeds from our ongoing capital campaign. Our phased approach ensures that after the completion of phase 2, the operational floors will contribute to the revenue, thereby facilitating the financing of phase 3.

### Experienced Leadership:

Leading our project is Joseph Serio, a distinguished community leader with a 34-year track record in Westminster. Joseph, former owner of Westminster Pharmacy and served as head of the Economic Development Committee since 2012. He has demonstrated a profound commitment to community development and preservation. He has been instrumental in multiple community initiatives, including the Westminster Cracker Festival and the Westminster Dog Show, aimed at establishing a permanent outdoor art collection on Main Street.

Also in the works is an outdoor ski chair museum. Antique lift ski chairs from around New England will have descriptions of where they came from and will double as park benches on Main Street. On will grace the corner of 2A/140 with a sign, Free Ski Chair Museum. A good number of the 600,000+ skiers who ski at Wachusett will take a spin and see what Westminster has to offer for the first time. The Cracker Factory, too. Joseph's experience and tireless dedication position our project for seamless execution and sustainable success.

### Strategic Partnerships:

We have engaged in preliminary discussions with Ted Fernold, the president of Atlantic Restoration, a reputable full-service building restoration company known for their solution-oriented and customer-centric approach. They have a great track record of delivering projects marked by excellence, on time, and within budget. President Fernold believes that Atlantic Restoration can execute each of the phases of this project. Atlantic Restoration is a bondable organization with an established relationship with a surety company, ensuring a smooth process to obtain a performance bond. Subject to the

awarding of the project by the Select Board, we plan to continue our discussions about a potential partnership with Atlantic Restoration to leverage their expertise in building restoration.

#### Detailed Project Schedule:

Our well-planned schedule outlines each task in the project, along with their start and end dates, to ensure that every phase of the project is executed flawlessly. We have allocated ample time for each task, from securing financing and obtaining construction permits to the installation of the elevator and exterior fit-out, ensuring that every aspect of the project is completed to the highest standard within the allocated time frame.

#### Commitment to Excellence:

We understand the significant impact of this project on the community and are deeply committed to transforming the old Westminster meeting house into a vibrant community arts center. Our combined financial readiness, experienced leadership, and strategic partnerships enable us to proceed with confidence, adhering to the outlined time schedules and delivering a project that will be a testament to our dedication to excellence and community development.

#### Conclusion:

We are poised to embark on this journey to enrich the Westminster community and are eager to commence the redevelopment project promptly. We look forward to the possibility of collaborating with the town of Westminster to bring this vision to life, ensuring the project's success through our robust financial foundation, experienced leadership, meticulous planning, and commitment to excellence and community well-being.

## Impact on Town Infrastructure

In our proposal to rejuvenate the Historic Meetinghouse, we are earnestly dedicated to minimizing and effectively managing the impact on Westminster's town infrastructure. Here's a description of how our proposed project will impact and potentially benefit the local infrastructure:

#### Water and Sewer

Our redevelopment plan ensures that the usage of municipal water and sewer systems will adhere to sustainable practices, aligning with the existing capabilities of the town. Renovations will incorporate water-efficient fixtures and appliances to moderate water demand, and all plumbing projects will be done with care to prevent unnecessary strain on the sewer system.

#### Drainage



We will reevaluate and enhance the current drainage system, ensuring it adheres to both environmental and municipal guidelines. Rain gardens, permeable paving, and other sustainable urban drainage systems will be considered for implementation to manage stormwater effectively, thereby reducing the risk of local flooding and limiting pressure on existing drainage infrastructure.

## Parking

We are committed to ensuring that parking facilities are aptly optimized and developed. The creation of a new parking lot beside the Old Town Hall is envisioned to cater to immediate parking needs. Furthermore, our proposal suggests a collaborative shared parking agreement with neighboring entities, mitigating the parking influx during peak hours or events ensuring a harmonious coexistence.

There is parking for hundreds of cars available on Main Street, which is minutes away. Part of the 2012 Walkability Study was to encourage parking on Main Street and walking, enhancing the shopping and dining experience of the center of Westminster.

## Public Safety

Ensuring public safety is pivotal. The redevelopment will be compliant with all applicable fire and safety codes, with robust emergency response protocols in place. We will work with the Westminster local fire and police departments to formulate efficient emergency evacuation plans. Adequate lighting and surveillance will be installed to bolster security and safeguard public welfare.

## Roads

Considering the strategic location of the Historic Meetinghouse, we anticipate minimal additional stress on the local road network. Our events and activities will be scheduled to avoid peak traffic hours, mitigating potential congestion on Main Street and nearby roads.

We anticipate that our dedicated planning and commitment to sustainability will guarantee a project that not only minimally impacts the existing infrastructure but also potentially enhances the communal and cultural fabric of Westminster's Village Center District.

## Economic Benefit to the Town

### Economic Impact and Tax Revenue

The revitalization of Westminster's Historic Meeting House is not merely a construction project; it's the manifestation of a vision where history, culture, and economic vitality intertwine. The planned redevelopment, with a notable emphasis on creating a hub for performing arts, endeavors to elevate Westminster as not just a town

but a destination, augmenting the economic landscape and substantially contributing to the town's tax revenue.

Envisioning the Meeting House as a nucleus of cultural and social interactions - encompassing plays, musicals, dance recitals and various events - we anticipate drawing both locals and tourists alike into the heart of Westminster. This influx of people naturally spirals into increased spending at local establishments, from restaurants to shops, thereby bolstering the local economy and, by extension, augmenting tax revenues. Furthermore, by providing a vibrant center that intertwines with recreational activities at nearby attractions like Wachusett Mountain, we endeavor to transform transient visitors into repeat visitors, continually injecting vitality into our town's economy.

### Job Creation and Local Employment

In alignment with our strategy to make Westminster a regional beacon for arts and culture, the project ensures the generation of both direct and indirect employment opportunities.

**Direct Employment:** The transformation of the Historic Meeting House into a cultural and community epicenter will directly generate job opportunities, spanning from construction to positions related to the operation, management, and maintenance of the facility.

**Indirect Employment:** The ripple effect of having a cultural hub is notably significant. By becoming a destination, local businesses - restaurants, shops, and services - will experience a boost in clientele, necessitating the creation of additional jobs in time to cater to the heightened demand. Moreover, the influx of visitors will potentially spur new businesses, enhancing the economic fabric of Westminster.

### Synergy with Existing Businesses and Potential for New Ventures

The execution of this project aims to create a symbiotic relationship with existing businesses and pave the way for new entrepreneurial ventures. The robust activities and events held at the Meeting House will serve as a catalyst, driving foot traffic and potential customers to local establishments. Experiences from towns like Easthampton illustrate the magnetism of arts and culture – wherein the nurturing of artists and cultural spaces precipitated the flourishing of diverse businesses.

The integration of the arts, combined with strategic utilization of the Meeting House, will essentially form a virtuous cycle: where cultural activities fuel business, and business, in turn, sustains the arts.

### Community Enrichment and Tourism Enhancement

In addition to being an economic engine, the Meeting House promises to be a vibrant space for community convergence and collective identity. A destination for arts,

gatherings, and local organizational activities, the Meeting House will not only solidify community bonds but also entice the substantial populace that engages in recreational activities nearby, converting them into active participants in our local economy.

In conclusion, our vision for the Historic Meeting House is not merely a project but a seed, one that will germinate into an entity that fosters community, arts, and economy. Under the leadership of Joseph P. Serio, a seasoned entrepreneur, and steadfast community advocate, we are positioned not only to embark upon but to shepherd this transformative journey, crafting a future where Westminster’s economic and cultural vitality is luminous and enduring.

## Project Schedule

Task	Start Date	End Date
<b>Phase 1</b>		
Secure Financing for Majority of Project Phase 1	8/23/2023	10/4/2023
General Contractor Selection	11/6/2023	1/1/2024
Procurement of Performance Bond	1/1/2024	1/31/2024
Closing on Building	1/31/2023	1/31/2024
Designer Proposals and Selection	2/1/2024	7/1/2024
Design Period and Cost Estimates	7/1/2024	11/1/2024
Obtain Construction Permits for Phase 1	1/1/2025	4/1/2025
Prepare Site for Construction	4/1/2025	4/15/2025
Hazardous Material Removal	4/15/2025	5/15/2025
Raze Back Addition of Building	5/15/2025	6/1/2025
Raise Building and Roll Building to Side	6/1/2025	7/1/2025
Demolition of First Floor, Foundation, and Addition	7/1/2025	8/1/2025
Excavation of Cellar for Building, excluding Addition	8/1/2025	9/1/2025
Installation of Concrete Foundation for Building	9/1/2025	10/1/2025
Attach Building to New Foundation	10/1/2025	11/1/2025
<b>Phase 2</b>		
Secure Financing for Project Phase 2	1/1/2025	1/1/2027
Obtain Construction Permits for Phase 2	1/1/2027	4/1/2027
New Addition Basement Excavation	4/1/2027	4/15/2027
Site Work	4/15/2027	6/15/2027
Form and Pour New Addition Concrete Foundation	4/15/2027	5/15/2027
Frame New Addition	5/15/2027	7/15/2027
Elevator Shaft Construction	7/15/2027	8/15/2027

Interior Fit Out of Existing First Floor and Second Floor	7/15/2027	10/1/2027
Interior Fit-out New Addition	8/15/2027	11/1/2027
Exterior Fit Out of New Addition	8/15/2027	11/1/2027
Elevator Installation	11/1/2027	12/15/2027
Elevator Testing and Inspection	12/15/2027	1/15/2028
MEP/FP Rough Ins of First Floor, Second Floor, and Basement	1/15/2028	2/1/2028
Finish MEP/FP Systems	2/1/2027	3/1/2028
Systems Commissioning	3/1/2028	4/1/2028
<b>Phase 3</b>		
Secure Financing for Project Phase 3	1/1/2027	1/1/2029
Obtain Construction Permits for Phase 3	1/1/2029	4/1/2029
Exterior Fit Out of Existing Building	4/1/2029	7/1/2029

## Business Plan

### Executive Summary

The Community Arts Center, envisioned at the Historic Meeting House in Westminister, Massachusetts, represents a confluence of history, community, and opportunity, aspiring to resurrect the building’s original role as the focal point and lifeline of the community. Constructed in 1839, the Historic Meeting House has been a silent witness to the evolving tapestry of community life, governance, and societal progression. The proposal aims to breathe new life into this historic edifice, transforming it into a vibrant hub for performances, meetings, communal gatherings, and a plethora of other activities that echo the rich historic and cultural legacy of Westminister. This venture necessitates a phased approach to restore the building and instill modern amenities, with an estimated total project cost of \$1.6 million, catering to community needs and fostering tourism to Westminister.

### Business Description

The proposed Community Arts Center is conceived as a beacon of cultural and historic rejuvenation, with the objective of revitalizing the iconic Historic Meeting House located in Westminister, Massachusetts. This endeavor aims to reanimate the spirit of the meeting house, reinstating it as the paramount destination for community interactions, lively cultural performances, civic engagements, and enriched communal bonding, all while fueling economic growth within the community. Our mission goes beyond mere restoration; it is to amalgamate historical reverence with modern functionality, thereby creating an inclusive, vibrant, and sustainable communal and living space.

## Vision Statement

To breathe new life into the Historic Meeting House, transforming it into a symbol of communal harmony, cultural vitality, and historical respect. We envisage it as a dynamic space radiating inclusivity, enlightenment, and celebration, weaving together the rich threads of past, present, and future generations. This endeavor seeks to blend historical preservation with functional modernization, reinforcing the communal spirit and fostering a thriving and vibrant Westminster community.

## Mission Statement

Our mission is to restore and revitalize the Historic Meeting House in Westminster, Massachusetts, by creating a multifunctional and accessible community hub. We aim to respect the building's rich history and architecture while ensuring its functionality and relevance to modern-day needs. The rejuvenation of this building will not only preserve an important part of Westminster's heritage but also serve as a catalyst for local economic, cultural, and community development.

## Goals

### 1. Historical Restoration:

Execute a comprehensive restoration of the Historic Meeting House, respecting and preserving its architectural heritage and ensuring the reinstatement of its original design and structural integrity, including a return of the stage and auditorium from the second floor to the first floor. The return to its original design creates a much clearer picture of the significance of the building when you walk into the expanse of the auditorium on the ground level.

### 2. Community Engagement and Services:

Establish a multifaceted Community Arts Center, offering a variety of services such as live performances, town meetings, and social gatherings, thereby fostering stronger community relationships and cultural enrichment.

### 3. Economic and Cultural Revitalization:

Stimulate the local economy and enhance community life through collaborative partnerships, programs, and events, establishing the Historic Meeting House as a central hub for civic engagement and cultural experiences.

### 4. Tourism and Historical Education:

Leverage the building's rich history, notably its association with Fredrick Douglass, to promote tourism and provide educational experiences on the historical significance of the building, contributing to the broader appreciation and understanding of our shared heritage. Douglass was the most photographed

person of the 19th century, the most prominent abolitionist and champion of women's rights.

5. Residential Development:

Transform the top floor into appealing and comfortable residential units, offering a unique living experience while contributing to the diversity of housing options in the area and generating a steady income stream to support the sustainability of the Community Arts Center.

6. Inclusive Accessibility:

Enhance accessibility throughout the building, ensuring that all community members, regardless of mobility, can fully participate in and enjoy the programs and services offered, aligning with the intentions set forth by the citizens' vote of the 1842 Annual Town Meeting.

7. Green Space Utilization:

Advocate for and encourage the continuous use and development of the green space around the Historic Meeting House, promoting community interaction and the shared use of space with neighboring establishments. The 1/2 acre of green space includes adjoining properties and has been used for fairs, church services, and by the neighborhood for decades. It is our intention to protect and continue this tradition along with public gardens on the perimeter as to not interrupt the green space. The recirculating pond and garden next to Town Hall is an example of the projects we will do.

8. Sustainable Financial Strategy:

Implement a robust and sustainable financial model involving diversified income streams, such as rents from residential and commercial units, catering services, and contributions from local and regional partners, ensuring the long-term viability and impact of the Community Arts Center.

9. Promotion of Arts and Dance:

Develop a thriving environment for arts and dance by accommodating a full-time dance studio, creating opportunities for the youth of Westminster and beyond to explore and cultivate their artistic talents. The uniqueness of a dance studio is that it is used after school and no nights and limited weekends. This allows the shared use of the property with caterers.

10. Civic and Commercial Utilization:

Provision office and meeting spaces that are versatile and equipped, serving the varying needs of civic groups and community members and offering rentable spaces for both regular and ad-hoc requirements, thereby fostering a

collaborative environment and enhancing the utility of the building to the community.

## Business Model

The Westminster Community Arts Center will serve as a multifunctional community hub, reincarnating the Historic Meeting House's essence. Operating as a community-centric enterprise, the center will primarily focus on offering mixed-use facilities, hosting performance spaces, dance studios, rental units, and providing office and meeting spaces for civic groups.

This initiative is planned to be a self-sustaining model, leveraging a diverse income stream comprising rental income, community contributions, grants, and strategic partnerships. Furthermore, the spaces will be available for rent to the community and civic groups, augmenting accessibility and utility for local gatherings and town functions.

## Market Analysis

### Industry Overview

The industry encompassing the Community Arts Center is a multifaceted one, combining historical preservation, cultural enrichment, community service, real estate, and performing arts. This convergence results in the creation of a unique space where each component plays a crucial role in contributing to both the economic and cultural value of the community.

### Historical Preservation and Cultural Enrichment:

In the realm of historic preservation and cultural enrichment, the Community Arts Center represents a commitment to maintaining and sharing the rich heritage and stories of the past. The industry is vibrant with organizations and entities aimed at preserving historical monuments, buildings, and spaces, attributing significant importance to the collective memory and identity of communities. The Cultural Facilities Fund and the Architectural Heritage Foundation are pivotal entities within this sector, driving initiatives to rejuvenate and sustain historically significant structures, enhancing their viability as hubs for cultural interactions and learning.

### Community Service Organizations:

Community service organizations operate in diverse domains, including arts, education, health, and social services, to foster communal well-being and development. Our Community Arts Center aligns with this sector's ethos, positioning itself as a beacon for communal gatherings, interactions, and events that serve to fortify the societal fabric. The confluence of different abutting entities, such as the Library, Churches, and Academies, elevates the center's role as a cohesive force, acting as a catalyst for community unity and enrichment.

## Real Estate and Mixed-Use Developments:

In the spectrum of real estate, mixed-use developments that synergize residential, commercial, and community spaces are increasingly sought after, optimizing utility and functionality. The Community Arts Center embeds this concept through the integration of residential apartments, performance spaces, and office units within a historic structure. This multifunctionality not only maximizes the economic viability and sustainability of the center but also fosters a dynamic environment conducive to varied activities and engagements.

## Performing Arts:

The performing arts sector is vibrant and dynamic, providing spaces for artists to express, perform, and connect with audiences. It includes theaters, dance studios, and other venues that host live performances and events. The Community Arts Center is poised to be a significant player in this domain, offering a 150-seat meeting room which will serve as a space for a variety of performances, town functions, and gatherings, invigorating the local arts scene and providing a platform for artistic expressions and dialogues.

## Target Market

The Community Arts Center seeks to serve a diverse and multifaceted audience, each with unique interests, needs, and contributions:

1. Local Community Members:

Those seeking cultural, social, and civic engagements will find a home within our walls, making the Meeting House a hub for community connection and enrichment.

2. Tourism:

Individuals with a proclivity for historical architecture and cultural experiences will find value in the rich history and preserved aesthetic of the Meeting House, making it a focal point for visitors. It cannot be overstated that there are 1 million visitors to Wachusett Mountain each year that we need to attract to our town.

3. Performing Arts Enthusiasts:

Patrons who appreciate live performances, theater, film and dance will experience entertainment within a historically significant setting, enriching their understanding and appreciation of the arts.

4. Local Organizations and Civic Groups:



With versatile spaces conducive to meetings and gatherings, the Meeting House is ideal for local groups and organizations that wish to convene in a setting steeped in local heritage.

5. Responsible Renters:

Individuals or entities that are respectful of historical premises will find a unique and enriching living experience in the Meeting House's residential units, contributing to the ongoing preservation of the building.

6. Local Businesses:

Enterprises seeking unique office spaces will benefit from the historical ambiance and central location of the Meeting House, fostering a conducive working environment.

7. Event Planners and Catering Services:

Local restaurants and service providers will find opportunities for partnerships in hosting social gatherings and events, enriching the local culinary and social scene.

8. Educational Institutions and Nonprofits:

The accessible and versatile spaces within the Meeting House are ideal for educational events and activities, allowing institutions to conduct seminars, workshops, and other instructional sessions in a setting that resonates with historical significance.

9. Historical Preservation Advocates:

Individuals and groups passionate about preserving historical spaces will find alignment with our mission, potentially fostering partnerships, sponsorships, and collaborations to further the preservation of other historical landmarks in the area.

10. Dance Studios and Practitioners:

The specialized sprung floor offers an optimal dancing environment, drawing dance enthusiasts and studios looking for space that meets their unique needs.

By catering to this extensive and diverse target market, the Historic Meeting House will not only sustain its operational viability but also will enrich the community, revitalize downtown Westminster, and preserve an invaluable piece of history for future generations.

## Organization Structure and Management

## Organizational Structure

The organizational structure for the redevelopment of the Historic Meeting House is streamlined yet dynamic, with a Project Management Team at the core, driving the vision and execution of the project, and an Advisory Board providing strategic counsel, insights, and governance.

### Project Management Team

The Project Management Team is responsible for the overall direction, coordination, implementation, execution, control, and completion of the Community Arts Center project, ensuring consistency with the organizational strategy, commitments, and goals.

**Joseph Serio:** As the former owner of Westminster Pharmacy for 34 years and chair of the Economic Development Committee since 2012, Joseph led the team with his extensive experience in community development and revitalization projects. Joseph is accountable for overseeing the entire project, ensuring alignment with the project's goals, and securing critical funding. His commitment to restoring and preserving historic structures in Westminster will be pivotal in the revitalization of the Historic Meeting House.

**Thomas Arsenault:** Thomas brings invaluable insights and expertise to the team. He is responsible for project strategy, risk management, and legal compliance, providing counsel on aspects pertinent to project execution and ensuring all statutory and regulatory requirements are met.

**Von Salmi:** With a strong background in construction and redevelopment, Von is in charge of the architectural integrity and construction management of the project. He will ensure that the renovation aligns with historical preservation standards, optimizing the blend of authenticity and modernity.

### Advisory Board

The Advisory Board acts as the strategic sounding board for the Project Management Team, providing guidance, expertise, and connections to ensure the success of the project. Their role is to offer insights and advice on the project's strategic direction, fundraising efforts, community relations, and historic preservation.

**Bill Aubuchon:** A prominent figure in the community and an owner of Aubuchon, Bill's role on the Advisory Board is critical for fostering community relations and engagement. His close relationship with Marcus Moran and his profound understanding of the local business landscape make him a pivotal asset in fundraising and community outreach.

**David McKeehan:** With his rich experience as the 31-year president of the North Central Chamber and an eight-year veteran of heading up the Detroit Historic District

Commission, David is instrumental in providing insights into community development, historic preservation, and local governance. His network and understanding of the region's dynamics aid in navigating the regional landscape and fostering collaborative relationships.

David Turcotte: An advisor specializing in architecture, wherein his expertise in architectural design and historic preservation is immensely treasured. Serving in the architectural sector with the Mt. Vernon Group since 2001, David has formulated a unique approach that skillfully marries the integrity of historical authenticity with the functionality of modern adaptations.

## Responsibilities

- **Strategic Decision Making:** The Project Management Team and Advisory Board collaborate to make strategic decisions that align with the mission and vision of the Historic Meeting House redevelopment.
- **Fundraising and Financial Oversight:** The Advisory Board, with its network and experience, supports the Project Management Team in fundraising efforts, exploring various avenues of capital, and ensuring financial prudence and accountability throughout the project's lifecycle.
- **Community Engagement and Relations:** Both entities work hand-in-hand to build and maintain strong relationships with the community, stakeholders, and partners, ensuring the project aligns with the community's values and aspirations.
- **Historical Preservation and Compliance:** The Advisory Board advises on preserving the historical significance of the building while complying with modern standards, ensuring the project balances heritage with functionality.

## Board of Trustees

Upon the successful redevelopment and operational commencement of the Historic Meeting House, a sustainable, long-term governance structure will be essential to ensure its enduring success and preservation. A permanent Board of Trustees will be established to provide overall governance, guaranteeing the continuation and enhancement of products and services, executing marketing and sales strategies, ensuring operational efficiency, and overseeing the capital structure.

## Composition

The Board will be composed of individuals with diverse expertise across areas vital to the sustained operation and growth of the Meeting House, such as:

- Historical Preservation & Cultural Management
- Financial Management & Fundraising
- Operations & Facility Management
- Marketing, Sales, and Community Engagement
- Legal & Compliance Management

## Key Responsibilities

1. Oversight of Operations:
  - Ensure the operational efficiency of the Meeting House.
  - Preserve the architectural and historical integrity of the facility.
2. Financial Management:
  - Oversee the financial health and capital structure of the entity.
  - Ensure sustainable funding through donations, grants, and income-generating activities.
3. Products and Services Management:
  - Supervise the planning, development, and execution of products and services.
  - Ascertain that the offerings align with the mission and historical significance of the Meeting House.
4. Marketing and Sales Strategy:
  - Develop and implement strategies to promote the Meeting House, attracting visitors, and enhancing its profile.
  - Ensure that the sales strategies are effective and align with the overall mission and values.
5. Legal Compliance and Risk Management:
  - Ensure adherence to legal, ethical, and regulatory requirements.
  - Identify and manage risks related to operations, finance, and reputation.
6. Community Engagement and Stakeholder Management:
  - Build and maintain robust relationships with the community and other stakeholders.
  - Engage in continuous dialogue with the community, ensuring that the Meeting House meets their expectations and maintains its relevance and impact.
7. Preservation and Enhancement of Heritage and Culture:
  - Uphold the historical essence of the Meeting House while integrating contemporary elements to enhance its appeal and functionality.

## Governance Framework

### Periodic Review and Strategic Planning

- The Board will conduct regular reviews of the Meeting House's strategies, operations, and financial performance.
- Engage in periodic strategic planning to align the Meeting House with evolving societal, cultural, and economic landscapes.

### Committees

- Various committees may be established under the Board, each focused on specific aspects like finance, operations, marketing, and historic preservation, for more focused and specialized oversight.

## Accountability and Transparency

- Establish policies ensuring transparency and accountability in the Board’s decision-making processes and the operational aspects of the Meeting House.
- Regularly communicate activities, decisions, and performance to the community and stakeholders through annual reports, meetings, and digital platforms.

## Succession Planning

- The Board will ensure continuity by engaging in proactive succession planning, identifying, and nurturing talent to fill positions as needed.

The establishment of a Permanent Board of Trustees signifies a commitment to the enduring success and preservation of the Historic Meeting House. By systematically overseeing the multifaceted aspects of management, from operations to community engagement, the Board will ensure that the Meeting House continues to serve as a vibrant, culturally rich, and community-centered venue in Westminister, Massachusetts, securing its legacy for generations to come.

## Conclusion

The combined strength of the Project Management Team, Advisory Board and future Board of Trustees creates a synergistic environment aimed at the holistic development and success of the Historic Meeting House project. The diverse array of expertise and experience within the team forms a robust foundation to navigate the multifaceted aspects of redevelopment, from conception to completion and continuing operations, ensuring the Historic Meeting House once again becomes the focal point of the community in Westminister, Massachusetts.

## Products and Services

### Description

Our venture aims to revitalize and restore the Historic Meeting House in Westminister, Massachusetts, transforming it into a multipurpose hub, weaving together historic preservation, community interaction, and diverse functional utility. This endeavor will provide the following suite of services and offerings:

1. Community Arts Center: A Convergence of Culture and Community

With the introduction of a 150-seat meeting room, the center will host live performances, town functions, and various other gatherings, creating a vibrant space for community interaction and cultural enrichment. The preservation and utilization of this space align with the citizens' intentions, fostering community bonding and reinforcing the town’s cultural heritage.

2. Mixed-Use Space: Residential and Office Units

**Residential Units:** The top floor will house two residential units, providing modern, comfortable living spaces that integrate seamlessly with the historic ambiance of the building, adding a significant revenue stream to support the project's sustainability.

**Office Rental Units:** The basement floor will feature two office rental units, promoting local entrepreneurship and offering nonprofits access to space at nominal or no charge. High casement windows will ensure ample light, creating a conducive working environment.

### 3. Dance Studio: Nurturing Talent and Creativity

The building will accommodate a dance studio, fostering artistic expression and talent development among the youth of Westminster. The historically significant sprung floor will provide an optimum surface for dance, accommodating the needs of a local dance studio and serving as a versatile space for other events and social gatherings.

### 4. Performance and Gathering Space: Strengthening Community Bonds

This project ensures the integration of Westminster groups with the Historic Meeting House. The interconnection and shared utilization of these spaces will reinforce the sense of community and create a thriving center for Westminster, reviving long-standing traditions and everyday communal activities.

### 5. Catering Services: Enhancing Social Gatherings

A collaboration with local restaurants, will allow the organization of catering services for events and social gatherings. This partnership will not only support local businesses but also enhance the community experience within our spaces.

### 6. Tourism and Educational Outreach: Promoting Historical Significance

The building's rich history will serve as an attraction and educational resource, highlighting the ongoing discussions on social justice and equality. This feature will strengthen the town's position as a historical New England Town and invite visitors to delve into a critical part of our history, contributing to the town's tourism.

### 7. Green Space Utilization: Encouraging Outdoor Community Interaction

The green space behind the Historic Meeting House will be conscientiously utilized to encourage outdoor activities and community interactions, offering a balanced mix of indoor and outdoor communal spaces to the citizens and visitors of Westminster.

## Marketing and Sales Strategy

## Branding and Positioning

Our objective is to reposition the Historic Meeting House not just as a building, but as a living symbol of the community's rich cultural, social, and historical heritage. By tapping into its historical significance and the remarkable figures like Fredrick Douglass, who once graced the building, we seek to make it a focal point for tourism, attracting visitors eager to explore and understand a critical part of our history.

### Marketing Objectives:

1. Historical Significance:
  - Leverage the historical significance of the Meeting House to drive local and tourist traffic.
  - Create engaging exhibits that underline the building's role in promoting social justice and community assembly.
2. Community Engagement:
  - Collaborate with the abutting organizations of the property for joint community events and activities, enhancing the communal spirit.
  - Foster partnerships with local schools and organizations for educational programs and workshops centered around history, social justice, and community development.
3. Cultural and Performance Hub:
  - Develop a robust program of live performances, town functions, and other gatherings that utilize the 150-seat meeting room, reviving it as a center for community gathering and cultural enrichment.
  - Establish partnerships with local restaurants for catering social gatherings, allowing the integration of local culinary experiences with cultural events.
4. Digital Presence:
  - Develop a comprehensive website and utilize social media to keep the community informed about upcoming events, historical exhibits, and community activities at the Meeting House.
  - Use online platforms for fundraising and community engagement, allowing people worldwide to contribute and participate in the preservation of this historic landmark.
5. Revenue Generation:
  - Actively seek donations, grants, and partnerships to ensure the long-term financial sustainability of the Meeting House.
  - Optimize the mixed-use space for revenue generation, offering rentals for dance studios, offices, and other community-oriented services, contributing to the yearly income and operational sustainability of the building.

## Sales & Promotion Strategy

In order to successfully market the Historic Meeting House and secure a steady revenue stream, it is pivotal to build comprehensive and diversified strategies focusing

on unique selling proposals, partnerships, community engagements, and versatile usage of the property.

#### 1. Unique Selling Proposition:

- **Historical Significance:**
  - Leverage the rich history of the venue, including the fact that renowned figures who have spoken there, to attract heritage tourism and history enthusiasts.
- **Versatile Space:**
  - Promote the adaptability of the auditorium for a mix of events, accommodating diverse community needs, including performances, town functions, social gatherings, and business meetings.

#### 2. Rental Income:

- **Develop competitive pricing strategies for renting the diverse spaces available within the building, ensuring steady income from the dance studio, residential units, and office spaces.**
  - Implement dynamic pricing models for event spaces, catering to different community needs and market demands.

#### 3. Partnerships and Collaborations:

- **Local Businesses:**
  - Actively engage and form partnerships with local entities, maximizing mutual benefits and community cohesion.
  - Develop symbiotic relationships with local restaurants for catering services at social gatherings, fostering community bonds and local business prosperity.
- **Historical and Cultural Entities:**
  - Collaborate with organizations focused on historic preservation to foster a supportive network, driving the project's sustainability and recognition.
- **Community Leaders:**
  - Leverage the influence and connections of community leaders like Joseph Serio, Bill Aubuchon, David McKeegan, and others to promote the project and secure financial support.

#### 4. Community Contributions and Fundraising:

- **Capital Campaigns:**
  - Conduct robust capital campaigns, targeting local and regional donors, utilizing the reputation and connections of the involved community leaders and influencers.



- Develop donor recognition programs to encourage contributions and maintain long-term relationships with the benefactors.
- Grants:
  - Proactively apply for grants, such as the Cultural Facilities Fund Grant, ensuring that all requirements are meticulously met and that the application stands out in the competitive process.
- Crowdfunding and Community Engagement:
  - Launch community-centric crowdfunding campaigns, emphasizing the communal and historical value of the project, encouraging small-scale donations and widespread support.
- Events and Programs:
  - Organize fundraising events and community programs, harnessing the restored space to raise funds and increase community engagement and awareness about the project.

## 5. Marketing and Promotion:

- Tourism:
  - Develop comprehensive marketing strategies targeting tourists interested in historical venues, utilizing digital platforms, local tourism boards, and heritage tourism networks.
- Brand Development:
  - Establish a strong and coherent brand identity for the Historic Meeting House, integrating its historical significance and communal values, and employ effective promotional activities.
- Community Outreach:
  - Engage the local community through outreach programs, social media campaigns, and community meetings, ensuring that the communal value and the versatile usage of the building are well-communicated.

By implementing a multifaceted sales strategy that leverages the unique selling propositions of the Historic Meeting House and by establishing diverse revenue streams, robust partnerships, and community engagement, we aim to ensure the sustainable financial success and the continued historic preservation and community significance of this venerable property.

## Operations Plan

### Operations Strategy

Our operational strategy is entrenched in our commitment to reviving the Historic Meeting House in Westminister, Massachusetts, as a community, cultural, and historic epicenter. We intend to meticulously plan our scheduling, maintenance, staffing, and every operational facet to ensure the seamless functioning of our community center.

## Operational Location

Our operation will primarily be situated in the renovated Historic Meeting House. Here, we will host performances, community gatherings, and a range of cultural and historical activities, thus fostering an environment that reinforces the community spirit and enriches the town's cultural fabric.

## Personnel and Roles

The dynamic nature of the center's activities necessitates a versatile team comprising administrative, maintenance, and support staff. A professional property manager will be contracted to oversee the administration of apartment and office space rentals and scheduling of the performance space. This role will also encompass marketing and advertising the building to optimize community engagement and attendance. Maintenance and janitorial services will be contracted out to ensure the upkeep of the building's aesthetics and functionality, with a network of experienced contractors on standby for any repair needs.

Additionally, our operational strategy involves engaging staff to handle day-to-day activities and facilitating various events. Our personnel strategy is to hire dedicated individuals committed to contributing to the center's vision of being a pivotal community space.

## Service Management

The contracted property manager will be responsible for ensuring tenant satisfaction in both the apartment and office space rentals while ensuring optimal utilization of the performance space. A service management strategy will be in place to handle any disruptions and guarantee the continuity of services provided.

## Operational Processes

1. **Scheduling:** The property manager will coordinate the scheduling of events, ensuring optimal utilization of the meeting and performance space and avoiding any scheduling conflicts.
2. **Maintenance and Upkeep:** Regular maintenance schedules will be established with external agencies for the upkeep of the building. Additionally, janitorial services will maintain cleanliness and hygiene.
3. **Marketing and Outreach:** The property manager will lead strategic marketing initiatives to enhance the visibility of the center and its offerings, targeting local communities and, potentially, tourists interested in historical venues.
4. **Snow Removal:** Given the local climatic conditions, contracted services will be employed for snow removal to ensure unhindered access to the facility throughout the winter season.
5. **Event Coordination:** The property manager will be responsible for coordinating events, ensuring the smooth execution of activities, and addressing any arising needs.

## Sustainability and Community Impact

Our operational processes are designed to minimize our environmental footprint and contribute to the town's socio-cultural development. The center's activities will emphasize community engagement, cultural enrichment, and historical awareness. We aim to make the center a space where the community can gather, learn, and collaborate, reinforcing Westminister's identity and promoting community wellbeing.

## Conclusion

This Operations Plan is formulated to uphold the integrity and historical significance of the Historic Meeting House while ensuring it continues to serve as a vibrant community hub. By integrating sound operational practices, dedicated personnel, and a strategic approach to service management, we strive to provide a sustainable, inclusive, and enriching space for the community and visitors alike.

## Financial Plan

Our revitalization of The Historic Meeting House in Westminister, Massachusetts, centers around a comprehensive and sustainable financial strategy. We aim to bring this structure back to life as a Community Center, integrating residential, commercial, and communal spaces that synergize to maintain this historic entity's longevity. This strategy outlines the various revenue streams, capital partnerships, and financial contributions.

### Financial Strategy Objectives

1. **Diversified Revenue Streams:** Ensuring multiple income sources, including rentals, performances, and events.
2. **Sustainable Funding:** Leverage grants, community contributions, and partnerships.
3. **Historical Preservation:** Maintain the historical integrity while modernizing the functionality.
4. **Community Engagement:** Encourage community and regional involvement through use and financial support.

### Revenue Streams

1. **Rental Income:**
  - Residential Units: \$55,200 per annum
  - Dance Studio: \$30,000 per annum
  - Basement Office Spaces: \$28,800 per annum
2. **Event & Performance Income:**
  - Estimated at \$40,000 per annum from catering for social gatherings.
3. **Community Contributions and Grants:**

- Targeting local donations, regional capital campaigns, and foundation contributions.

Projected Total Annual Income: \$158,800+ per annum

## Capital Structure & Funding

### Phase 1: Initial Restoration

- Total Contributions: \$428,402

#### Key Partners & Contributions:

- Aubuchon Foundation: \$20,000
- Bill Aubuchon: \$20,000
- Joseph Serio: \$50,000
- Regional Capital Campaign/Joseph Serio\*: \$338,402

\*Guarantee of up to \$250,000 of any deficiencies of the Regional Capital Campaign.

### Phase 2: Operational Building Enhancement

- Total Contributions: \$470,000
- Shared Equity Mortgage: \$500,000

#### Key Partners & Contributions:

- Regional Capital Campaign: \$250,000
- Cultural Facilities Fund: \$100,000
- Local Donations: \$100,000
- Aubuchon Foundation: \$20,000

### Phase 3: Full Operational Enhancement

- Total Contributions: \$200,000

#### Key Partners & Contributions:

- Regional Capital Campaign: \$100,000
- Local Donations: \$100,000

## Grants and Community Engagement

1. Cultural Facilities Fund Grant:
  - Application for a 1:1 cash matching grant of up to \$200,000.
  - Engage the community to demonstrate the required need and acquire state eligibility.

2. Organizations such as the Architectural Heritage Foundation:
  - Consultation for strategic approaches in historic preservation projects and potential public funding via grants.
3. Community Survey:
  - Execute surveys within Westminister to assert the communal need and support for the project.
4. Community Arts Foundation:
  - Implementation of projects that enhance community relations and promote cultural integrity.
5. Local Donations:
  - Launching campaigns to involve local citizens and businesses in contributing to the preservation of the town's heritage. Rental income from residential and office units.

## Risk Management

To establish a framework of comprehensive vigilance and proactive strategy, our Risk Management section delineates the possible risks and corresponding mitigation strategies associated with the restoration, redevelopment, and operation of the Historic Meeting House in Westminister, Massachusetts. The Meeting House, with its rich historical background and significance, stands as a monumental project aiming to revive a communal space that aligns with the values and historical essence of the community.

In transforming this structure into a functional Community Arts Center, we are conscious of various potential risks, including fundraising challenges, restoration complications, and operational inefficiencies that may arise. These are inherent in dealing with properties steeped in history and communal value, coupled with the multifaceted nature of restoration and redevelopment projects.

Understanding the multiplicity and interconnection of these risks is imperative in formulating effective, adaptive, and resilient strategies to mitigate them. This section will further delve into the aspects of each identified risk and provide an approach to mitigate them, ensuring the sustained success and longevity of the project while preserving the invaluable heritage and promoting the communal and cultural essence of the Historic Meeting House.

## Potential Risks

1. Fundraising Challenges:

While significant support from community leaders and stakeholders is anticipated, achieving the desired fundraising goals can be impacted by unforeseen economic conditions, competing philanthropic priorities, and donor fatigue.

2. Restoration Complications:

Given the historic nature of the Meeting House, unforeseen structural, regulatory, or preservation-related obstacles may arise, potentially leading to increased costs and delays.

3. Operational Inefficiencies:

Balancing the varied needs of multiple tenants and community stakeholders may pose challenges in optimizing operational effectiveness and tenant satisfaction.

4. Market Risks:

Fluctuations in the local real estate and rental market can affect the expected income from residential and commercial rentals.

5. Regulatory and Compliance Risks:

Ensuring compliance with local, state, and federal historic preservation and building standards may entail unanticipated complexities and financial obligations.

6. Reputational Risks:

Any negative perceptions or dissatisfaction among community members or tenants can impact the Center's image and overall success.

## Mitigation Strategies

1. Diversified Fundraising Strategies:

Leveraging the strong networks and reputations of Joseph Serio, Bill Aubuchon, David McKeegan, and others, we will implement a multifaceted fundraising approach, including capital campaigns, grant applications, local donations, and partnerships to mitigate fundraising challenges.

2. Expert Consultations for Restoration:

Engaging subject matter experts will ensure sound restoration practices, addressing potential complications and ensuring compliance with preservation standards.

3. Effective Operational Planning:

Establishing clear operational guidelines, tenant agreements, and proactive communication strategies will address operational inefficiencies and balance the diverse needs of stakeholders.

4. Market Research and Analysis:

Continuous monitoring of market conditions and trends will help in adapting rental strategies, pricing, and tenant acquisition to mitigate market-related risks.

5. Community Engagement and Brand Building:

Engaging with the community through open dialogues, surveys, and regular updates will foster positive relationships and mitigate reputational risks. Additionally, leveraging the historic significance of Fredrick Douglas and the commitment to social justice discussions will enhance the Center's image and appeal.

6. Financial Management:

Adopting prudent financial management practices, maintaining adequate reserves, and securing guarantee arrangements will safeguard against financial shortfalls and market volatility.

## Financial Risk Strategy

Our financial strategy is grounded in sound financial management, diversified income streams, and community engagement. The phased approach to fundraising and development, outlined above, ensures that adequate funds are secured before embarking on each phase of restoration and development.

1. Diversified Income Streams:

The combination of residential rentals, dance studio rent, office space rent, and catering provides a balanced and steady source of income, mitigating dependency on a single income stream.

2. Community Partnerships:

Strengthening partnerships with local entities will foster community integration and mutual support.

3. Strategic Marketing:

Highlighting the historical significance of the Meeting House and promoting its role as a hub for progressive discussions will drive tourism and community participation, supporting the overall financial health of the project.

4. Cost Management:

Prudent cost management and continuous monitoring of expenses will optimize the financial performance and ensure the long-term viability of the Center.

## Conclusion

Dear Old Town Hall Review Committee Members and Westminster Select Board,

As we draw this proposal to a close, the Community Arts Foundation wishes to express our sincere gratitude for considering our vision for the Community Arts – a vision deeply rooted in honoring the past while actively engaging with the future.

The whispers of history within the walls of the Meeting House speak not just to a bygone era but stand as a testament to the enduring spirit of Westminster's community. Lincoln and Douglass's timeless ideals of unity, liberty, and the pursuit of progress are echoes from the past that can still infuse our actions and decisions today.

Our proposal is not merely a renovation plan; it's a commitment to perpetuating Westminster's legacy through a vibrant, active, and inclusive community space. We are not only preserving bricks and mortar but safeguarding a vessel that carries our history, culture, and collective memories, ensuring they are passed down to subsequent generations.

This cherished edifice will be a beacon of community spirit, creativity, and collaboration, continuing its tradition of bringing people together in the heart of Westminster's Village Center District. By championing a future where the Meeting House serves as a multi-functional community space - from performances to civic events - we are perpetuating its role as a hub of cultural and social activity that is accessible and beneficial to all.

Community Arts Foundation, with its experienced team and genuine dedication to the local community, envisions the Meeting House not just as a building but as a living, breathing entity that grows, adapts, and contributes dynamically to Westminster's flourishing future.

We respectfully submit our proposal with a spirit of collaboration and openness. Our team is poised to discuss our plans with the town to ensure the prosperity and continued significance of the Historic Meeting House. Let us together forge a path that honors our rich history, celebrates our present community, and seeds a vibrant, future for generations to come.

Thank you for your time and consideration.

With respectful regards,

Joseph P. Serio, President, Community Arts Foundation, Inc.

Thomas J. Arsenault, Director, Community Arts Foundation, Inc.



# Required Forms

(Cover Page)  
**PROPOSAL FOR REDEVELOPMENT  
OF THE  
HISTORIC MEETINGHOUSE**  
3 Bacon Street  
Westminster, Massachusetts



Submitted by:

Community Arts Foundation, Inc

89 North Commers Rd

Westminster, MA 01473

978 870 2361

JosephSerio@yahoo.com

(Name, Address, Telephone Number and E-Mail Address of Proposer)

Date Submitted: 10/4/23

**PURCHASE PRICE PROPOSAL FORM**  
**FOR THE PURCHASE OF THE HISTORIC MEETINGHOUSE**  
**WESTMINSTER, MASSACHUSETTS**

Seller: Town of Westminster, acting by its Select Board  
Westminster Town Hall  
11 South Street,  
Westminster, MA 01473

Buyer: Community Arts Foundation, Inc  
89 North Common Rd  
Westminster, MA 01473  
978 870 2361

Premises: Historic Meetinghouse  
3 Bacon Street  
Westminster, MA 01473

Proposed Purchase Price: \$ 1.00

Proposed Purchase Price (in words): one dollar

Proposed Closing Date: February 1, 2024

Signature	<u>Joseph P. Serio</u>	Title	<u>President</u>
Print name	<u>Joseph P. Serio</u>	Date Signed	<u>9/29/23</u>

**AFFIDAVIT OF NON-COLLUSION**

The undersigned certifies under the penalties of perjury that this bid or proposal is in all respects bona fide and fair and has been made and submitted in good faith without collusion or fraud with any other person. As used in this affidavit, the word "person" shall mean any natural person, joint venture, business, partnership, corporation, union, committee, club, organization, group of individuals, municipal official or other business or legal entity.

Signature: Joseph P. Seno  
Date: 9/29/23

Name [Printed]: Joseph P. Seno  
Title: President

Company: Community Arts Foundation, Inc

**TOWN OF WESTMINSTER – REQUEST FOR PROPOSALS**  
**SALE OF HISTORIC MEETINGHOUSE**  
**CERTIFICATE OF TAX COMPLIANCE**

Pursuant to M.G.L., Ch. 62C, s. 49A, the undersigned certifies, under the penalties of perjury, that the below named individual or company has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

*Joseph P. Spin*

\_\_\_\_\_  
Signature of Individual or Corporate Officer

*Community Arts Foundation, Inc*

\_\_\_\_\_  
Company Name

~~XXXXXXXXXXXX~~

\_\_\_\_\_  
Social Security Number or Federal  
Identification Number\*

*9/29/23*

\_\_\_\_\_  
Date

**TOWN OF WESTMINSTER – REQUEST FOR PROPOSALS  
SALE OF HISTORIC MEETINGHOUSE**

CERTIFICATE OF AUTHORITY

Give full names and residences of all persons and parties interested in the foregoing proposal:

(Notice: Give first and last name in full; in case of a corporation, give names of President and Treasurer; in case of a limited liability company, give names of the individual members, and, if applicable, the names of all managers; in case of a partnership or a limited partnership, all partners, general and limited and; in case of a trust, all the trustees)

	NAME	ADDRESS	ZIP CODE
President	Joseph P. Scavo	XXXXXXXXXXXXXXXXXXXX Westminster, MA	01473
Treasurer	Gary McDermott	XXXXXXXXXXXXXXXXXXXX Westminster, MA	01473
Clerk	Thomas A. Scavo	XXXXXXXXXXXXXXXXXXXX 14th St Washington, DC	20003

Kindly furnish the following information regarding the Proposer:

1) **IF A PROPRIETORSHIP**

Name of Owner: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Name of Business: \_\_\_\_\_  
 Home: \_\_\_\_\_

2) **IF A PARTNERSHIP**

Business Name: \_\_\_\_\_  
 Business Address: \_\_\_\_\_  
 Names and Addresses of Partners

PARTNER NAME	ADDRESS	ZIP CODE
_____	_____	_____
_____	_____	_____
_____	_____	_____

3) **IF A CORPORATION OR A LIMITED LIABILITY COMPANY**

Full Legal Name: Community Arts Foundation, Inc  
State of Incorporation: Massachusetts  
Principal Place of Business: 89 North Commers Rd Westhampton, MA 01472  
Qualified in Massachusetts: Yes  No   
Place of Business in Massachusetts: 89 North Commers Rd Westhampton, MA 01472

4) **IF A TRUST**

Full Legal Name: \_\_\_\_\_

Recording Information: \_\_\_\_\_

Full names and address of all trustees:

NAME	ADDRESS	ZIP CODE
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signature: Joseph P. Seaw Attest: Thomas J. Arsenault  
Printed name: Joseph P. Seaw Clerk of Community Arts Foundation, Inc.  
Title: President  
Name of Business: Community Arts Foundation, Inc  
Date: 9/25/23

**TOWN OF WESTMINSTER – REQUEST FOR PROPOSALS  
SALE OF HISTORIC MEETINGHOUSE**

**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: The parcel of land with the building and other improvements thereon located at 3 Bacon Street, Westminster.

(2) Type of Transaction, Agreement, or Document:

Sale of Town Property

(3) Public Agency Participating in Transaction:

Town of Westminster

(4) Disclosing Party's Name and Type of Entity (if not an individual):

Josef L.P. Seris

(5) Role of Disclosing Party (Check appropriate role):

Lessor/Landlord  Lessee/Tenant

Seller/Grantor  Buyer/Grantee

Other (Please describe): \_\_\_\_\_

**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)**

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

<u>NAME</u>	<u>RESIDENCE</u>
<u>Joseph P. Seno</u>	<u>89 North Common Rd Westminister, MA</u>
_____	_____
_____	_____

01473

(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):

(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.

Joseph P. Senio  
Print Name of Disclosing Party (from Section 4, above)

Joseph P. Senio 9/29/23  
Authorized Signature of Disclosing Party Date (mm / dd / yyyy)

Joseph P. Senio President  
Print Name & Title of Authorized Signer

## Appendices

## Appendix A

# Aubuchon Foundation Community Arts Foundation Contribution Pledge

### Community Arts Foundation Charitable Contribution Pledge

In order to support the Community Arts Foundation for the purpose of preserving and restoring the Historic Meeting House in Westminster, I pledge the sum of \$60,000.

This contribution will be paid over three years with the first \$20,000 being paid on demand. The Community Arts Foundation can use this donation for general needs, including capital construction, endowment and/or operating expenses.

Aubuchon Foundation  
William E. Aubuchon, IV  
95 Aubuchon Drive Unit #1  
Westminster, MA 01473  
(508) 331-4423  
[will@aubuchon.com](mailto:will@aubuchon.com)



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October 2, 2023

## Appendix B

### Bill Aubuchon Community Arts Foundation Contribution Pledge

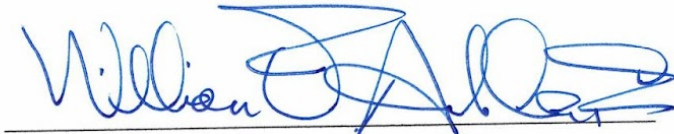
#### COMMUNITY ARTS FOUNDATION CHARITABLE CONTRIBUTION PLEDGE

In order to support the Community Arts Foundation for the purpose of preserving and restoring the Historic Meeting House in Westminster, MA, I pledge the sum of \$20,000.

This contribution will be paid on demand.

The Community Arts Foundation can use this donation for general needs, including capital construction, endowment and/or operating expenses.

William E. Aubuchon, III  
P.O. Box 27  
18 Bayridge Ln.  
Rockport, MA 01966  
(978) 302-5714  
[bill@aubuchon.com](mailto:bill@aubuchon.com)



Sep 28, 2023

## Appendix C

### Joseph Serio Community Arts Foundation Contribution Pledge

#### **Community Arts Foundation Charitable Contribution Pledge**

In order to support the Community Arts Foundation for the purpose of preserving and restoring the Historic Meeting House in Westminster, MA, I pledge the sum of \$50,000.00. This pledge consists of a \$25,000.00 contribution from Joseph Serio and a matching anonymous donation of \$25,000.00 for a grand total of \$50,000.00. The anonymous pledge is guaranteed by Joseph Serio.

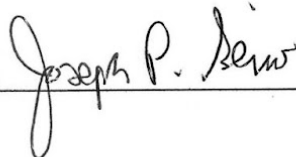
This contribution will be paid on demand. The Community Arts Foundation can use this donation for general needs, including capital construction, endowment and/or operating expenses.

Joseph P. Serio

89 North Common Rd

Westminster, Ma 01473

Signature

A handwritten signature in black ink that reads "Joseph P. Serio". The signature is written in a cursive style and is positioned above a horizontal line.

Date September 28, 2023

Appendix D  
Joseph Serio Community Arts Foundation Capital Campaign  
Contribution Pledge

**Community Arts Foundation Charitable Contribution Pledge**

In order to support the Community Arts Foundation for the purpose of preserving and restoring the Historic Meeting House in Westminster I pledge to guarantee up to \$250,000 of deficiencies of the Phase 1 Capital Campaign's goal of \$338,402.

This contribution will be paid on demand at the end of the Phase 1 campaign for deficiencies up to \$250,000. The Community Arts Foundation can use this donation for general needs including capital construction endowment and/or operating expenses.

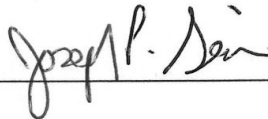
Joseph P. Serio

89 North Common Rd.

Westminster, Ma 01473

(978)870-2361

Signature \_\_\_\_\_



Date September 28, 2023

# Appendix E

## Bank Credit Qualified Buyer Letter for Mortgage



### CREDIT QUALIFIED BUYER LETTER

9/29/2023

**Joseph Serio**  
**89 North Common Rd.**  
**Westminster, MA 01473**

**Re: 3 Bacon Street Westminster, MA**

Dear Joseph;

Congratulations! Based on our preliminary review of your credit, we are pleased to inform you that you have been **Credit Qualified** for a mortgage with TD Bank, America's Most Convenient Bank!

We've completed a preliminary review of your credit and we're happy to share that you are credit qualified for a mortgage with us. Below is an estimate of the sale price, loan amount and mortgage product type for which you may qualify:

**Loan Amount:** \$500,000  
**Product Type:** 30 Year Fixed Rate Mortgage

Use this letter to start home shopping today! With it, you'll know the price range of homes you can consider and have the confidence that your credit meets our mortgage requirements.

**Remember, you'll still need official approval to borrow.**

This credit qualification is not our final commitment to lend. In order to receive a final loan decision, you must provide a fully executed contract of sale and complete a mortgage application. Approval will be based upon you providing all required documentation needed to verify the information on your loan application, a satisfactory appraisal and satisfying other underwriting requirements. However, this letter demonstrates that you are serious about buying a home and are ready to be a homebuyer!

Share a copy of this letter with sellers and/or real estate professionals to express your intent to purchase a home. Then, once you find your ideal home and sign a Purchase & Sales Agreement, just let us know. We'll update your mortgage profile with information specific to the property and begin the application process right away.

**Get going today - your Credit Qualification letter is good for 90 days.**

This Credit Qualification letter expires 90 days from the date of this letter. If you can't find a home and submit a Purchase & Sales Agreement within this timeframe, and wish to continue searching for a home, you'll need to renew your Credit Qualification. But, we hope this is enough time to find the home of your dreams.

Thank you again for choosing TD Bank, America's Most Convenient Bank, for your home financing needs!

As a reminder, Sean is your resource for all information regarding your Credit Qualification, and to answer your questions.

Please do not hesitate to contact us at any time.

Sincerely,

Sean Perkins | Wealth Mortgage Officer | Physician Loan Specialist

**TD Bank, America's Most Convenient Bank**

Mailstop: MA2-187-020 | One Union Street, Boston, MA 02108

M: 774-502-6619

Email: [sean.perkins@td.com](mailto:sean.perkins@td.com)

This Credit Qualification is based on our preliminary review of your credit history as well as stated income and financial information you have provided. Any substantial change in your financial condition or credit standing may negatively impact your ability to get a mortgage. You are responsible for keeping all financial obligations current. It is also recommended you not apply for other types of credit or increase debt, if possible. In addition, the estimated monthly mortgage payment referenced during the Credit Qualification process is calculated by utilizing TD's current mortgage rates and loan programs. Mortgage rates and loan program availability are subject to change without notice. This Credit Qualification does not obligate you to borrow from TD Bank.

Member FDIC TD Bank, N.A.

Equal Housing Lender



# Appendix G

## Joseph Serio Property Asset Report



**Property Asset Report for Joseph Serio**  
2023

October 2,

This report is based on statistical information of the current real estate market and information was gathered through Realtor Property Resources for MA and NH. This information reflects the current market value of the real property only.

Property Address	Estimated Value	Amount Owed	Net Value
43 Slalom Lane Franconia NH 03580	\$451,000.00	\$105,000.00	\$346,000.00
89 N Common Rd Westminster MA 01473	\$449,000.00	\$122,000.00	\$327,000.00
4 Pleasant St Westminster MA 01473	\$395,000.00	\$102,000.00	\$293,000.00
134 Main St Westminster MA 01473	\$625,000.00	\$232,000.00	\$393,000.00
128 Main St Westminster MA 01473	\$635,000.00	0	\$635,000.00
<b>Totals:</b>	<b>\$2,555,000.00</b>	<b>\$561,000.00</b>	<b>\$1,994,000.00</b>

This report was completed by:

Judy Scotland, The Scotland Team at Keller Williams Realty North Central



## Appendix H Von Salmi Curriculum Vitae

### CURRICULUM VITAE

#### Von Salmi Senior, ASLA

##### PROFESSIONAL EXPERIENCE

- 2008 – Present**      **Von Salmi and Associates, Inc., Westminster, MA**  
**President/ CEO**  
Providing Services to clients including the legal profession, consisting of owner's representation, project management, construction consulting, construction forensic services and expert witness testimony. Performing construction forensic services and expert witness testimony services from 1996 to 2008 DBA Von Salmi Sr.
- 2004 – 2008**      **The Classic Group, Lexington, MA**  
**Senior Project Manager**  
Responsible for overseeing the construction of high-end homes from 5,000 sq. ft. to 35,000. Responsible for estimates, bidding, specifications, contracts, payments and client relationships.
- 2000 – 2004**      **Thoughtforms Corporation, Acton, MA**  
**Project Manager/Site Superintendent**  
Responsible for the construction of multi-million-dollar homes and their site construction.
- 1996 – 2000**      **Kepa Homes Corp., Southborough, MA**  
**General Manager and Superintendent**  
Responsible for the day-to-day operations of a custom home and spec. home building operation. Designed and constructed approximately 60 homes in and around the Southborough area ranging from \$350,000 - \$950,000.
- 1994 – 1996**      **Von Salmi Masonry, Westminster, MA**  
**Owner**  
Masonry and landscape business working in the Metro West area on high end residential homes and sites.
- 1991 -1994**      **Cherry Valley Lumber Company, Cherry Valley, MA**  
**VP of Sales and Operations**  
Responsible the operations and sales for a multi-location retail/contractor lumber company.
- 1980 – 1991**      **Yankee Lumber and Specialty Products, Inc., Westminster, MA**  
**Ceo/ President**  
Owned and operated a retail lumber company, millwork and building company. Built custom homes and landscapes in in New England.
- 1978 – 1980**      **Webber Lumber Company, Fitchburg, MA**  
**Contractor Outside Salesman**  
Selling lumber and associated products to residential contractors in Central MA and Southern, NH
- 1976 – 1978**      **Halla Nursery, Chanhassen, MN**  
**General Manager**  
Responsible for the day-to-day operations of an 800-acre national award-winning nursery, landscape contracting and design company. Worked on corporate, industrial, public, institutional and private properties.

- 1975 – 1976**      **Buckeye State Landscapes, Toledo, OH**  
**General Manager and Landscape Designer**  
 Responsible for a residential landscape company providing residential landscape design and contracting services.
- 1974 – 1975**      **Dean Johnson, Landscape Architects, Barnstable, MA**  
**Landscape Designer**  
 Worked on public, institutional and private projects providing landscape architectural services.
- 1966 – 1974**      Worked various jobs as an apprentice plumber, roofer, painter, construction laborer, carpenter, carpentry foreman, heavy equipment operator, truck driver, mason, landscape laborer in the residential industry.

**PROFESSIONAL CREDENTIALS**

- **Massachusetts Licensed Construction Supervisor**
- **Massachusetts Licensed Home Improvement Contractor**
- **Massachusetts Licensed CDL Driver**
- **Massachusetts Licensed Environmental Protection Agency Renovate Repair and Paint Lead Safe Renovator**
- **Minnesota, Certified Nurseryman**

**EDUCATION**

**1968 - 1974**      **Kansas State University in Manhattan, Kansas**  
 Professional 5 year Bachelors of Landscape Architecture, Minor in Architectural History

**CERTIFICATIONS AND TRAINING COURSES COMPLETED**

- Occupational Safety and Health Administration (OSHA) 10-hour Construction Safety & Health
- Massachusetts Environmental Protection Agency Renovate Repair and Paint Lead Safe Renovators Certification
- Certificates in Marvin Doors and Windows and Andersen Doors and Windows
- Certificate in EFIS Application and Coatings
- Certificate in Stress Skin Panel Construction and Timber Frames
- Certificate HVAC Design and Performance Standards
- Certificate in Fenestration Testing and Performance
- Certificate in Wood Flooring and Applications Over Radiant Heat
- Masonry Waterproofing and Flashing Systems, Horizontal Masonry Applications for Dry and Wet Set, & Vertical Masonry Flashings Details
- Contracting and Liability Insurance
- Roofing and Flashing Details for Natural and Manmade Roofing Products
- Landscape Lighting Systems, Low Voltage Lighting Systems, and Electrical Lighting and Mechanical Systems

**PROFESSIONAL MEMBERSHIPS**

- American Institute of Architects (AIA)
- American Society of Landscape Architects (ASLA)
- Boston Society of Landscape Architects (BSLA)
- Builders and Remodelers Association of Greater Boston (BRAGB), Board of Directors
- Professional Remodelers Organization of New England (PRONE), Board of Directors
- Massachusetts Home Builders Association (MHBA)

- 1975 – 1976**      **Buckeye State Landscapes, Toledo, OH**  
**General Manager and Landscape Designer**  
 Responsible for a residential landscape company providing residential landscape design and contracting services.
- 1974 – 1975**      **Dean Johnson, Landscape Architects, Barnstable, MA**  
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**PROFESSIONAL MEMBERSHIPS**

- American Institute of Architects (AIA)
- American Society of Landscape Architects (ASLA)
- Boston Society of Landscape Architects (BSLA)
- Builders and Remodelers Association of Greater Boston (BRAGB), Board of Directors
- Professional Remodelers Organization of New England (PRONE), Board of Directors
- Massachusetts Home Builders Association (MHBA)

- National Association of Home Builders (NAHB)
- National Wood Flooring Association (NWFA)
- International Code Council (ICC)

#### **AREAS OF EXPERTISE**

- Building codes for single and two-family structures
- Specification and cost reviews & compliance standards
- Provide quantitative analysis of cost of completed work to date and cost for project completion
- Site design and construction for stairs, guards and rails, walls, driveways and walkways
- Building envelope design and successful waterproofing techniques
- Water penetration, foundation failures and repairs
- Siding failures
- Roofing failure to perform
- Window and door installations and fenestration details
- Masonry detailing and water control practices
- Radiant heat installations both interior and exterior
- Quality control/performance on HVAC
- Plumbing and electrical installations
- Landscaping and site issues for residential sites, walks, drives and parking areas
- Construction safety and practices on site and any other issues related to building construction
- Providing owner's representative services

#### **PAST EXPERT WITNESS CASE HISTORY (PARTIAL)**

- Reviewed contractors' failure to perform
- Analyzed the costs of services provided and construction completed to date
- Examined wrongful discharge by owners
- Investigated defective workmanship for interior and exterior finishes
- Reviewed professional failures to perform, the proper standards of care, the design, the specifications, and the installation
- Analyzed and diagnosed water piping failures in a pex water distribution system in a multi-million-dollar home
- Inspected and diagnosed major failures of defective water proofing and drainage systems, plumbing systems, and mechanical systems
- Reviewed the work by a nationally noted landscape architect and their failure to provide proper supervision, which resulted in catastrophic loss and damages in a multi-million-dollar landscape
- Inspected water intrusion and resultant damages
- Investigated and diagnosed foundation failures
- Analyzed and diagnosed causation factors leading to flooring materials and workmanship defects
- Interpreted the building code from inception to present day for a major insurer/reinsurer case
- Reviewed interior finishes (plaster, paint, standing and running trim, case goods, cabinetry, stone work, tile.. etc.) to confirm with manufacturer's instructions, industry standards, code requirements, and diagnosed compliance for standards of care and remediation methodologies
- Testified before an international panel of arbitrators regarding multi-million-dollar insurance loss regarding code applications of roofing
- Accepted as an expert in federal, state, and local courts and in dozens of arbitration and mediation hearings.



# Appendix I

## David Turcotte Biography and Resume

### **David Turcotte Bio**

David Turcotte, Associate, has been directly involved with many of Mt. Vernon Group's public school projects for over 20 years. Projects include Elementary through High School and in three states, Massachusetts, New York (New York City) and New Jersey. His experience has spanned from drafter to Job Captain to Project Manager and his degree in Historic Preservation from Roger Williams University, B.A. 1992, he aids the Committee firm with its historically sensitive projects.

David is currently acting as **Project Manager and Assistant Construction Manager** on the Washington Irving School PFD project in Roslindale. He was also involved with the 12 Channel Street 9<sup>th</sup> Floor DND Temp Fit Out project from its inception when MVG was asked to produce a number of schematic plans at various locations throughout the City. He was also involved with the Project Management, Construction Documents and Administration phases for the 41 New Chardon Street COVID Emergency Renovations PFD project, as well as aiding with the Contract Documents for the BCEC COVID Emergency Renovations project for the City. Additionally, David worked as Job Captain and drafter on the Boston City Hall HVAC project and performed Construction Administration tasks throughout its duration.



### **David M. Turcotte, Associate**

Historic Preservation/Job Captain

Mr. Turcotte is a Senior Associate and Project Manager with over 20 years of experience in the preparation and management of construction documents for public facilities. He was the On-Site Construction Administrator leading into the opening of the Dock Street SCA projects where he coordinated design and consultant teams along with interacting with engineers and clients. He coordinates projects from schematic design through addendum phases. Mr. Turcotte has participated in the design of many new construction and renovation educational projects for MVG. Mr. Turcotte is our in-house preservationist; he holds a Bachelor of Science degree in Historic Preservation from Roger Williams University. He is currently restoring his own property in Western MA, highlighting its' historical detail and past significance in the community.

### **Relevant Project Experience**

- IS Dock Street K611 Brooklyn, NY
- Dock Street Pre-K, Brooklyn, NY
- PS/IS 30 Mary White Ovington, Brooklyn, NY
- Sara M. Gilmore Academy, Union City, NJ
- Hudson School, Union City, NJ
- Gilmore Academy, Union City, NJ
- Washington Irving School, Boston, MA
- Goodnow Brothers Elementary School, Marlborough, MA
- Dracut High School, Dracut, MA
- City of Boston Public Facilities Department – Various House Doctor Renovation Projects
- Massachusetts School Building Authority – Accelerated Repair Program – Reroofs, Multiple Locations
- Pole Elementary School, Taunton, MA
- Amesbury High School, Amesbury, MA
- Clough Elementary School, Mendon, MA
- Collins Hall, Bentley University, Waltham, MA
- Washington and Lee University, Wilson Field, Lexington, VA
- Lafayette College, McCracken Field House, Easton, PA
- Tibbetts Brook Park, Pool Modernization, Yonkers, NY

### **Education**

Bachelor of Science, Historic Preservation, Roger Williams University, Bristol, Rhode Island, 1992  
Architectural Degree Program, Boston Architectural College, Boston, Massachusetts, 1998

### **Memberships**

West Minster, Massachusetts Historical Society Building Committee Member

# Appendix J

## Thomas J. Arsenault Resume

**Thomas Joseph Arsenault**

451 S St NW, Washington, D.C. 20001

(978) 906-1115

arsenault.j.tom@gmail.com

linkedin.com/in/thomas-arsenault

A service-driven leader with a passion for solving meaningful problems. Track record of driving results in the public and private sectors. Master’s graduate who seeks to utilize public policy, government affairs, and consulting experience to effect positive change in society through civil service.

**EDUCATION**

**Arizona State University**, Tempe, AZ

August 2018 – May 2020

Master of Business Administration

Awards: Forward Focus Full Merit Scholarship Recipient

**University of Massachusetts**, Amherst, MA

September 2010 – May 2014

Bachelor of Business Administration, Accountancy and Information Systems, Minor in Information Technology

Awards: John and Abigail Adams Scholarship Recipient, Sullivan Bille PC Scholarship Recipient

**QUALIFICATIONS**

Public Policy Analysis	Public Administration	Research	Negotiations
Government Relations	Project Management	Advocacy	Risk Analysis
Political Analysis	Presentation Skills	Detail-Oriented	Decision Modeling
Program Evaluation	Cross-Cultural Collaboration	Team Management	Problem Solving
Strategic Planning & Execution	Cross-Functional Teams	Talent Development	Mentoring
Business Continuity Planning	Microsoft Excel	Communications	Leadership
Diversity & Inclusion	Adaptability	Interpersonal Skills	Public Speaking

**PROFESSIONAL EXPERIENCE**

**United States Postal Service**, Washington, D.C.

**Government Relations Representative, Government Relations and Public Policy**

September 2020 – Present

- Designed proactive strategies to engage Members of Congress and their staff and communicated the Postal Service’s mission, programs, policies, and activities, resulting in increased awareness and support of the organization's legislative priorities including the successful passage of the landmark Postal Service Reform Act of 2022, the first significant postal reform legislation since 2006.
- Managed responses to written and verbal congressional inquiries and requests for information in a professional and efficient manner, coordinating responses from internal Postal Service stakeholders to provide accurate and timely information on complex issues.
- Supported the preparation of Postal Service witnesses for congressional hearings by conducting thorough research, analyzing complex issues, and communicating findings in a clear and concise manner, resulting in effective messaging that accurately reflected the agency's priorities.
- Developed and maintained positive relationships with Members of Congress and their staff through regular communication and engagement, resulting in increased awareness and support of the agency's mission, program, policies, and procedures.
- Monitored and tracked relevant congressional activity, staying abreast of legislative developments and their potential impact on the agency.
- Researched complex agency issues with congressional attention, synthesizing findings into briefings for senior officials, informing strategy for the agency’s approach to handling issues.
- Contributed as a trusted advisor in meetings with Members of Congress and their staff, offering valuable insights and recommendations on legislation related to the agency.
- Provided guidance and support to internal stakeholders on legislative and policy matters, ensuring a cohesive and coordinated approach to engaging with Members of Congress and their staffs and effectively communicating the organization's mission and priorities.
- Preparing senior Post Service leadership for meetings with Members of Congress allowing for productive discussions and strengthened relations between the agency and Members.
- Proactively identified and resolved significant local issues in congressional districts by obtaining information from



- Postal Service district and area leaders, ensuring accuracy, and communicating it effectively on tight deadlines.
- Developed working knowledge of the day-to-day activities of the United States Postal Service Inspector General's Office, reviewing and evaluating congressional inquiries related to audits, evaluations, and investigations involving waste, fraud, and abuse and appropriately referring these inquiries to the OIG's office.
- Fostered strong, positive relationships with lawmakers and congressional staff through frequent communication, reliable information on activities and priorities, and timely and professional responses to inquiries and concerns.
- Conducted business in a nonpartisan manner, utilizing tact and diplomacy to explain various viewpoints while demonstrating an understanding of the audience's position, reinforcing trust and respect with lawmakers and congressional staff.

**Arizona Department of Child Safety, Phoenix, Arizona**

**Strategy Consultant**

January 2020 – April 2020

- Developed and executed a comprehensive strategy to comply with the Family First Prevention Services Act (FFPSA) and operationalize the prevention services array for Arizona's childcare services.
- Led a diverse team of 7 consultants with cross-functional expertise and cultural awareness to deliver recommendations that were approved and implemented by the Director of Arizona's Department of Child Safety.
- Coauthored a detailed 32-page report outlining three major recommendations with clear implementation plans and roadmaps to increase the provision of preventative childcare services in Arizona.
- Designed and implemented innovative mechanisms for delivering childcare services that addressed the longstanding gap between demand and capacity, benefiting families throughout the state.
- Collaborated with various stakeholders, including governmental agencies, private sector industry leaders, policy advisors, and academic experts, to incorporate best practices in childcare services into our recommendations.
- Conducted extensive research on how each state was planning to comply with the FFPSA and used the findings to inform our analysis and recommendations for Arizona's compliance.

**Unnamed Technology Company, California**

**Strategy Consultant**

November 2019 – April 2020

- Conducted extensive market research and analysis of the Radio Access Network (RAN) global market to inform Facebook's strategy for providing internet access to underserved populations worldwide.
- Led and managed a team of 5 consultants, overseeing project milestones and deliverables, to present final recommendations to the client's senior leadership team, resulting in a successful outcome.
- Developed a detailed Tableau dashboard to visualize the global vendor ecosystem for RAN and its subcomponents, analyzing market share, competitive landscape, and total available market.
- Evaluated the impact of new technology and telecommunications regulatory standards on company's future strategy in the RAN space.
- Conducted in-depth research and analysis on the complex implications of congressional legislation affecting telecommunications, providing key insights and recommendations to inform the company's decision-making.
- Performed financial modeling to evaluate the potential impact of mergers and acquisitions in the telecommunications industry on the company's path forward in the RAN market.

**United States Senate, Washington, D.C.**

**Policy Advisor, Senate Committee on Homeland Security and Governmental Affairs**

May 2019 – August 2019

- Conducted thorough research and authored policy memos on a range of complex policy areas, including immigration, labor/employment, postal affairs, government reform, and border security strategies employed by DHS and other government agencies to inform Senator Kyrsten Sinema's voting decisions on bills.
- Provided expert staffing support to Senator Kyrsten Sinema at Homeland Security and Governmental Affairs Committee hearings, crafting her statements and questions for witnesses and ensuring her participation was effective and impactful.
- Analyzed pending legislation within the committee and recommended clear voting strategies for Senator Kyrsten Sinema based on the synthesis of complex policy areas to ensure her positions aligned with her constituents' interests.
- Reviewed research papers on political strategy for the committee to use when developing policy-based solutions that serve the interests of Senator Kyrsten Sinema's constituents.
- Attended policy briefings, wrote reports, and delivered briefings to the committee on current affairs and potential legislation, ensuring all members were informed and aware of important developments.
- Analyzed the economic impact of each regulatory and deregulatory action on the 2019 Unified Agenda, providing

key insights to inform regulatory reform legislation.

- Vetted and questioned presidential nominees for senior Department of Homeland Security, United States Postal Service, and other federal government agency Senate-confirmed positions for full committee hearings, including vetting and questioning, and wrote reports with political recommendations for Senator Kyrsten Sinema on the nominees.
- Drafted effective questions for the record to investigative subjects, Committee witnesses, and industry stakeholders, ensuring they provided valuable insights and information.
- Authored clear and concise section-by-section memos summarizing key legislation the committee was developing, providing essential information to committee members, and ensuring their complete understanding of the legislation.

**PricewaterhouseCoopers**, Boston, MA

**Senior Associate, Risk Assurance**

August 2014 – July 2018

- Led and supervised high-profile global engagements with 32+ domestic and 100+ international staff, delivering quality results and achieving client satisfaction.
- Managed multi-million-dollar projects as the primary client liaison, overseeing project management duties such as budgeting, forecasting, reporting, and communication, resulting in on-time and on-budget delivery of projects.
- Proactively identified client needs and crafted compelling business proposals/presentations, resulting in over \$3 million in revenue generation for the firm.
- Provided expert consultation in diverse areas, including business continuity management, cybersecurity attestation, business process attestation, financial statement audit, IT audit, internal audit, and attestation reporting, helping clients improve their risk management and operational efficiency.
- Designed, implemented, and managed multiple ongoing projects, ensuring effective utilization of resources, timely delivery, and client satisfaction.
- Served clients in a dozen industries, including private equity, investment banking, technology, insurance, healthcare, and retail/consumer products, delivering tailored solutions to meet their unique needs.
- Fostered collaborative relationships with stakeholders inside and outside the organization, facilitating information sharing and achieving common goals.
- Recognized with the Risk Assurance Northeast Star of the Quarter Award for executing an IT process evaluation project supporting a complex multi-million dollar first-year client, resulting in the continued business pipeline and client satisfaction.
- Mentored early-career consultants, providing guidance, feedback, and coaching to foster their personal and professional growth, while promoting a culture of collaboration and excellence.
- Organized and led social events, including the annual Thanksgiving flag football game for over ten years, building a strong sense of community within the organizations served.

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## **PUBLIC SERVICE**

**Harvard Business Review**, Boston, MA

**Author**

November 2019 - February 2021

- Co-authored 'Synergies: Artificial Intelligence and Mental Health, a future case study that examines the landscape of mental healthcare services in the country and assesses future technology-based solutions to meet the unmet demand for services that currently exists
- Conducted research and analysis on regulations from the Department of Health and Human Services on the applications of technology to treat mental health disorders
- Collaborated with Dr. Regina Hertzingler of Harvard University and Dr. Eugene Schneller of Arizona State University to inform research conducted
- Interviewed healthcare industry stakeholders to gain perspective on the mental healthcare industry.

**Arizona State University Graduate and Professional Student Association**, Tempe, AZ

**Director of Federal Government Affairs**

June 2019 – May 2020

- Served as appointed to a director-level position after achieving goals and adding value to the graduate student population during time as an Assembly Member
- Authored the student government advocacy agenda, which provides a narrative on policy areas intersecting higher education and the official stance of the student government, representing more than 15,000 students.
- Developed ASU's student body policy agenda and communicated it with federal legislators in Washington, D.C.
- Led the planning and execution between 3 universities for Washington D.C. meetings with all 11 members of the

Arizona congressional delegation educating legislators on graduate students in Arizona and how to best support them.

- Tracked pending federal legislation relevant to student interests and prepared ASU responses when necessary.
- Monitored Congressional Record for activities relevant to higher education, authoring position papers detailed policy considerations associated with the activity.
- Drafted proposed legislation advocating for the best interests of college students with federal government agencies and the university administration.
- Performed research to answer questions on legislative matters posed by various stakeholders of ASU.
- Coordinated policy efforts with ASU's Office of Government Relations, fostering new relationships with the university.

**Assembly Member, Graduate and Professional Student Association** October 2018 – May 2019

- Elected official of the graduate school senate, representing the 1500 graduate students of the W.P. Carey School of Business.
- Led the Advocacy and Professional Development subcommittee of the International Student Affairs committee.
- Organized events around personal, academic, and professional development for the international student population, which resulted in over one hundred attendees building cross-cultural relationships.
- Orchestrated international graduate student orientation lunch, which included culture immersion table exercises.
- Graduate Student Bill of Rights Task Force team member crafting a first-of-its-kind bill of rights for the graduate student body.
- Met with members of the federal and state legislatures representing Arizona, educating their offices on higher education policy areas at the federal and state levels and advising them on policy-based solutions to address issues in higher education.
- Advised the graduate student senate regarding the ASU international student and LGTBQ communities through service on the Diversity & Inclusion committee driving advocacy initiatives.
- Awarded External Affairs Committee member of the year based service in external affairs committee drafting bills that advocated for graduate student interests.

**Arizona State University W.P. Carey School of Business, Tempe, AZ**

**Special Advisor, MBA Healthcare Club** May 2019 – Present

- Developed strategies for the healthcare club vision, which helped double club participation from the previous academic year.
- Consulted in club programming, which yielded 3 healthcare organization CEOs coming to campus for events.

**Peer Coach, Career Management Center** August 2018 - Present

- Delivered life coaching and career coaching services to undergraduate and graduate students at Arizona State.
- Built relationships with over 35 students through one one-on-one appointments to develop strategies for life and career planning.
- Coached students to successful post-graduation outcomes that resulted in the highest student retention rate among coaches.

**PricewaterhouseCoopers, Boston, MA** August 2014 – July 2018

**Member, Responsible Business Leadership Team**

- Taught financial literacy and technology to over 50 Boston area students through a partnership with local schools.
- Mentored Boston area high school students through relationship building and reviewing college application materials.
- Cleaned up public recreation areas and volunteered at local food and clothing banks.