

# Proposal for Marcella and Highland Streets Package 4 Highland Yard Mixed-Income Housing



Submitted February 14, 2018

City of Boston  
Department of  
Neighborhood Development  
Bid Counter  
26 Court Street, 10th Floor  
Boston, MA 02108  
Attn: John Feuerbach, Senior  
Development Officer



**utile**





February 14, 2018

John Feuerbach  
Senior Development Officer  
Dept. of Neighborhood Development  
26 Court Street  
Boston, MA 02108

RE: Highland Yard – Mixed Income Housing Proposal  
Marcella Highland RFP (Package 4)

Dear John:

It is with great pleasure that we submit the following proposal to construct 18 mixed-income residential units on the Package 4 Parcels identified in DND's Request for Proposals – Marcella and Highland Streets. The proposed project, which we are calling Highland Yard, includes 18 two-bedroom condominium units, 6 of which will be for households earning below 80% AMI, 6 for households below 100% of AMI, and 6 at market rate.

Our primary goals for the project are to 1) create affordable units **in perpetuity** in a neighborhood that is rapidly improving; 2) design an attractive building that adds to the character of the neighborhood and 3) meet the goals under the Boston E+ Green Building Program. In order to achieve these goals, we have assembled an experienced and talented group of professionals, including Utile, Inc. as the project architect, NEI General Contracting as the general contractor, and Advanced Building Analysis LLC as the sustainability/LEED consultant.

New Atlantic Development is committed to fairness and equity. These concepts are applied to our relationships with the City of Boston, our partners, our neighbors, and the individuals and families we serve. For us, the bottom line is less important than building and maintaining the trust and respect of these stakeholders. We very much look forward to working with DND to bring this project to fruition.

Sincerely,

A blue ink signature of William Madsen Hardy, consisting of a stylized 'W' followed by a long horizontal line.

William Madsen Hardy  
Owner

A blue ink signature of Brian Goldson, featuring a stylized 'B' and 'G'.

Brian Goldson  
Owner

236 Huntington Avenue • Suite 314 • Boston, MA 02115



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# PART 1: INTRODUCTORY DOCUMENTS

## 1.1 Introductory Documents

### 1.1.1 Cover Sheet Form

#### Appendix 1 – Cover Sheet Form

<b>SOLICITATION, OFFER AND AWARD</b>				
1. PROJECT NAME		2. TYPE OF SOLICITATION		3. Date Issued
Marcella and Highland Streets		Invitation for Bids Negotiated (RFP)		November 13, 2017
4. ISSUED BY: City of Boston, Department of Neighborhood Development 26 Court Street, 10 <sup>th</sup> Floor Boston, MA 02180				5. ADDRESS OFFER TO: (If other than item 4)
<b>NOTE:</b> In sealed bid solicitations "offer" and "offeror" mean "bid" and "bidder"				
<b>SOLICITATION</b>				
6. Sealed offers (original and 3 copies) will be received at the place specified in item 4 until <b>4:00 p.m. (EST) February 14, 2018.</b> <b>CAUTION:</b> Late submissions, Modifications, and Withdrawals: See Section 10. All offers are subject to all terms and conditions contained in this solicitation.				
7. For Information Contact:	7a. Name	7b. Telephone	7c. Fax	7d. E-mail
	John Feuerbach	(617) 635-0353	(617) 635-0383	<a href="mailto:John.feuerbach@boston.gov">John.feuerbach@boston.gov</a>
<b>OFFER</b>				
8. In accordance with the terms of this RFP, the undersigned agrees, if this offer is accepted, to furnish any and all supporting documentation upon request by DND.				
<b>OFFER PRICE:</b>	\$1,000.00			
<b>9. SUBMISSION CHECKLIST</b>				
<input checked="" type="checkbox"/>	Appendix 1: COVER SHEET FORM	<input checked="" type="checkbox"/>	Appendix 6: AFFIDAVIT OF ELIGIBILITY	
<input checked="" type="checkbox"/>	Appendix 2: PROPOSAL CHECKLIST	<input checked="" type="checkbox"/>	Appendix 6: CHAPTER 803 DISCLOSURE STATEMENT	
<input checked="" type="checkbox"/>	Appendix 3: STATEMENT OF APPLICANT'S QUALIFICATIONS	<input checked="" type="checkbox"/>	Appendix 6: DISCLOSURE/BENEFICIAL INTEREST STATEMENT	
<input checked="" type="checkbox"/>	Appendix 4: DEVELOPMENT TIMETABLE FORM	<input checked="" type="checkbox"/>	Appendix 6: PROJECT SUMMARY	
<input checked="" type="checkbox"/>	Appendix 5: CONSTRUCTION EMPLOYMENT STATEMENT	<input checked="" type="checkbox"/>	Appendix 6: PROPOSAL FORM-PRICE	
<input checked="" type="checkbox"/>	Appendix 6: PROPERTY AFFIDAVIT			
10. ADDRESS OF OFFEROR			11. Name and Title of Authorized Signatory (Print)	
236 Huntington Ave, Suite 314 Boston, MA 02115			William Madsen Hardy, Owner	
14. Phone Number			12. Signature	13. Offer Date
617-335-8821				2/14/18

## 1.1.2 Proposal Checklist

### Appendix 2 – Proposal Checklist

#### General Submission Requirements:

- 1 original and 4 application copies submitted
- Appendix 1: Cover Sheet Form
- Appendix 2: Proposal Checklist
- Proposal Summary and Narrative
- Appendix 3: Statement of Applicant’s Qualifications Form
- Appendix 4: Development Timetable Form
- Appendix 5: Construction Employment Statement Form
- Appendix 6: DND Form Links- Property Affidavit Form
- Appendix 6: DND Form Links- Affidavit of Eligibility Form
- Appendix 6: DND Form Links- Chapter 803 Disclosure Statement Form
- Appendix 6: DND Form Links- Disclosure/Beneficial Interest Statement Form
- Appendix 6: DND Form Links- Project Summary
- Appendix 6: DND Form Links- Proposal Form- Price
- Certificate of Good Standing relating to the entity from the Massachusetts Secretary of State
- Pre-Development Sources and Uses Budget (w/ proof of cash availability)
- One Stop Application for Development Budget- Use Sections 1-7, including “Project Summary Information”, “Rent Profile Analysis”, “21-Year Operating Proforma” and “Operating Expense Analysis” and Development Cost Analysis”
- Evidence of Financing- Letter of Interest or Commitment Letter from an established Financial Institution
- Evidence of Acquisition of Privately-owned Land, if applicable
- Audited Financial Statement (most recent)
- Resumes of Development Team
- Design Submittal as outlined in Design Standards in DND website link
- LEED Checklist demonstrating LEED compliance strategy
- Green Narrative that addresses, at a minimum, Integrated Design Process, Green and LEED strategy and sources of green funding.
- Stable Occupancy- Narrative addressing “Stable Tenancy” requirement (see “General Guidelines”)
- Narrative and response to “Diversity and Inclusion” requirement (see “General Guidelines”)

## 1.1.3 Certificate of Good Standing



William Francis Galvin  
Secretary of the  
Commonwealth

*The Commonwealth of Massachusetts*  
*Secretary of the Commonwealth*  
*State House, Boston, Massachusetts 02133*

February 6, 2018

TO WHOM IT MAY CONCERN:

I hereby certify that a certificate of organization of a Limited Liability Company was filed in this office by

**NEW ATLANTIC DEVELOPMENT LLC**

in accordance with the provisions of Massachusetts General Laws Chapter 156C on **May 10, 2002.**

I further certify that said Limited Liability Company has filed all annual reports due and paid all fees with respect to such reports; that said Limited Liability Company has not filed a certificate of cancellation or withdrawal; and that said Limited Liability Company is in good standing with this office.

I also certify that the names of all managers listed in the most recent filing are:  
**WILLIAM MADSEN HARDY, BRIAN GOLDSON**

I further certify, the names of all persons authorized to execute documents filed with this office and listed in the most recent filing are: **WILLIAM MADSEN HARDY, BRIAN GOLDSON**

The names of all persons authorized to act with respect to real property listed in the most recent filing are: **WILLIAM MADSEN HARDY, BRIAN GOLDSON**



Processed By:nem

In testimony of which,  
I have hereunto affixed the  
Great Seal of the Commonwealth  
on the date first above written.

A handwritten signature in cursive script, reading "William Francis Galvin".

Secretary of the Commonwealth

# 1.2 General Evaluation Criteria Documents

## 1.2.1 Statement of Applicant's Qualifications Form


### Appendix 3 – Statement of Applicant's Qualifications

All questions must be answered. All information must be clear and complete. Attach additional pages, if needed.

1. Name of Applicant: New Atlantic Development LLC
2. Names and titles of principals: \_\_\_\_\_  
William Madsen Hardy - Owner  
\_\_\_\_\_  
Brian Goldson - Owner  
\_\_\_\_\_
3. Names of authorized signatories: \_\_\_\_\_  
William Madsen Hardy and Brian Goldson  
\_\_\_\_\_
4. Permanent main office address: \_\_\_\_\_  
236 Huntington Avenue, Suite 314, Boston, MA 02115  
\_\_\_\_\_  
Phone: 617.335.8821 Fax: \_\_\_\_\_ Email: bill@newatlantic.net
5. Date organized: May 10, 2002
6. Location of incorporation: Massachusetts  
\_\_\_\_\_
7. Number of years engaged in business under your present name: 15
8. List at least three private or public agencies that you have supplied/provided with similar services to that in this solicitation:
  - a. Boston Planning and Development Agency
  - b. Town of Brookline
  - c. Boston Community Capital

Has organization ever failed to perform any contract?  YES  NO  
If YES, attach a written declaration explaining the circumstances.

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

  
\_\_\_\_\_  
Signature of individual submitting application  
Owner  
\_\_\_\_\_  
Title  
New Atlantic Development LLC  
\_\_\_\_\_  
Legal Name of Organization  
2/14/18  
\_\_\_\_\_  
Date

## 1.2.2 Development Timetable Form

### Appendix 4 – Development Timetable

**APPLICANT'S NAME:** New Atlantic Development LLC

Assuming that you are designated in May 2018, indicate below your target dates for achieving these key development milestones.

MILESTONE	DATE
Designs Complete	6/18 initial design 11/18 final design
Apply for Permit(s)	6/18 (rejection) 12/18 Re-submit
Zoning Relief Anticipated?	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
All Development Financing Committed	1/19
Permit(s) Issued	1/19
Financing Closed	1/19
Construction Begins	2/19
Construction Complete	2/20

### 1.2.3 Construction Employment Statement Form

## Appendix 5 – Construction Employment Statement

**APPLICANT’S NAME:**           New Atlantic Development LLC          

How many full time employees does your firm currently have?

Under 25                       25 -99                       100 or more

Are you a Boston-based business?  YES       NO

*“Boston Based”:* where the principal place of business and/or the primary residence of the Applicant is in the City of Boston.

Are you a Minority-owned Business Enterprise?      YES       NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)?      YES       NO

Are you a Woman-owned Business Enterprise?      YES       NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)?      YES       NO

### **RESIDENT, MINORITY AND FEMALE CONSTRUCTION EMPLOYMENT**

The Boston Residents Jobs Policy requires developers to seek to achieve the following construction employment goals:

**Boston Residents    51% of project hours**  
**People of Color      40% of project hours**  
**Female                    12% of project hours**

Applications that provide evidence of their ability to achieve these targets will be more highly ranked. Explain what steps you will take to promote employment of these groups:

The proposed contractor for the project is Crosswinds Enterprises, which is a boston-based MBE general contractor with significant experience and success with resident, minority and female construction employment. The owner/developer will work closely with the contractor through the bidding, awarding and hiring process to ensure maximum effort is given to reach the stated goals.

If you have additional information demonstrating your capacity to achieve these employment targets, you may provide this information on a separate sheet clearly labeled at the top with “Supplementary Construction Employment Statement” and the Applicant’s name.

*Note: if you are, according the US Dept. of Housing & Urban Development, a Section 3 certified vendor, this will be considered strong evidence of capacity to achieve DND’s employment goals.*

If you have completed any development projects in the last five years that have required employment reporting through the City’s Office of Jobs & Community Services, please list the most recent here:

## 1.3 Compliance Review Documents

### 1.3.1 Property Affidavit Form

#### City of Boston (COB) – Property Affidavit Form

**Instructions:** List all City of Boston properties currently owned, or previously foreclosed upon for failure to pay real estate taxes or other indebtedness, by the applicant or by any other legal entity in which the applicant has had or now has an ownership or beneficial interest. If there are any past due amounts owed to the Department of Neighborhood Development, the Inspectional Services Department, the Treasury Department and/or the Boston Water and Sewer Commission, such **must be paid in full** before: (1) a vote request can be presented to the City of Boston Public Facilities Commission concerning the sale of property to the applicant or any other business entity in which the applicant has an ownership or beneficial interest; OR (2) the commitment of funding to the applicant or any other business entity in which the applicant has an ownership or beneficial interest. Public Facilities Commission votes are not to be requested until the Property Affidavit has been approved and the Legal Unit has signed the Property Clearance Form.

Upon approval, the Property Affidavit will be valid for ninety (90) calendar days from the date it is signed by the Applicant.

For any additional properties that do not fit on this form, attach a spreadsheet. Do not use another property affidavit form. Only one signature page is to be submitted. All entries made on this form must be typed in the form fields provided below.

**Applicant:** New Atlantic Development LLC

List Addresses of Boston Properties Owned:	PARCEL ID NUMBER
612-618 Columbia Road Unit R	0703892012
Boston Properties Previously Foreclosed Upon by COB:	PARCEL ID NUMBER

I declare under pains and penalties of perjury that the foregoing representations are true, accurate, complete and correct in all respects.

William Madsen Hardy



2/14/18

Print Name and Title

Authorized Representative's Signature

Date

Applicant Contact (If different from above)

Telephone Number

**OFFICIAL USE ONLY** (Fax the completed form to DND at 635-0262. Delinquency Reported: (If Yes (Y) state the amount owed):

**Boston Water & Sewer Commission**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes:

**Department of Neighborhood Development**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes:

**Public Works Department**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes:

**Treasury Department**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes:

DND Contact

Division

Program

Phone: ext.

Approved by a vote of the Public Facilities Commission on August 23, 2012.

### 1.3.2 Affidavit of Eligibility Form

#### AFFIDAVIT OF ELIGIBILITY FORM

Developer's Name: New Atlantic Development LLC

Any person submitting an application for under this RFP must truthfully complete this Affidavit and submit it with their application.

1. Do any of the principals owe the City of Boston any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?

NO

2. Are any of the principals employed by the City of Boston? If so, in what capacity? (Please include name of principal, name of agency or department, and position held in that agency or department).

NO

3. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?

NO

5. Have any of the principals ever been convicted of any arson-related crimes, or currently under indictment for any such crime?

NO

6. Have any of the principals been convicted of violating any law, code, statute or ordinance regarding conditions of human habitation within the last three (3) years?

NO

Signed under the pains and penalties of perjury this

14th day of February, 20 18

SIGNATURE: 

TITLE: William Madsen Hardy - Owner/Manager

ORGANIZATION: New Atlantic Development LLC

ADDRESS: 236 Huntington Ave, Suite 314, Boston 02115

### 1.3.3 Chapter 803 Disclosure Statement Form

#### CHAPTER 803 DISCLOSURE STATEMENT FORM

In compliance with Chapter 60, Section 77B of the Massachusetts General Laws as amended by Chapter 803 of the Acts of 1985, I hereby certify that I have never been convicted of a crime involving the willful and malicious setting of a fire or of a crime involving the fraudulent filing of a claim for fire insurance; nor am I delinquent in the payment of real estate taxes in the City of Boston, or being delinquent, an application for the abatement of such tax is pending or a pending petition before the appellate tax board has been filed in good faith.

This statement is made under the pains and penalties of perjury this 14<sup>th</sup> day  
of February, 2018  
Month Year



Proposer Signature

Co-Proposer Signature (If Applicable)

### 1.3.4 Beneficial Interest Statement Form

(Form B-1)  
(3/14)



## CITY OF BOSTON JOBS AND LIVING WAGE ORDINANCE

THE LIVING WAGE DIVISION ● (617) 918-5259

### BENEFICIARY AFFIDAVIT

Any for-profit Beneficiary who employs at least 25 full-time equivalents (FTE) or any not-for-profit Beneficiary who employs at least 100 FTEs who has been awarded Assistance of \$100,000 or more from the City of Boston must comply with the **First Source Hiring Agreement** provisions of the Boston Jobs And Living Wage Ordinance.

*If you are submitting a Request for Proposal, Request for Qualification, or Invitation for Bid, or negotiating a loan, grant, or other financial Assistance that meets the above criteria, you must submit this Affidavit along with your proposal. If you believe that you are exempt from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance, complete Section 4: Exemption: First Source Hiring Agreement provisions, or if you are requesting a General Waiver, please complete Section 5: General Waiver Reason(s).*

**IMPORTANT:** Please print in ink or type all required information. Assistance in completing this Form may be obtained by calling The Living Wage Administrator, The Living Wage Division of the Office Of Jobs And Community Services, telephone: (617) 918-5259, facsimile: (617) 918-5299.

#### Part 1: BENEFICIARY OF ASSISTANCE INFORMATION:

Name of Beneficiary: New Atlantic Development LLC (or its wholly-owned affiliate)

Contact Person: William Madsen Hardy

Address: 236 Huntington Ave, Suite 314, Boston, MA 02115  
Street City Zip

Telephone #: 617-35-8821 Fax #: \_\_\_\_\_

E-Mail: bill@newatlantic.net

#### Part 2: ASSISTANCE INFORMATION:

Name of the program or project under which the Assistance is being awarded:  
Highland Marcella RFP

Awarding Department: Department of Neighborhood Development

Bid or Proposal Amount: \$1,000

Date Assistance Documents Executed: 2/14/18 Award End Date: \_\_\_\_\_

JOBS & COMMUNITY SERVICES ● 43 HAWKINS STREET ● BOSTON, MA 02114

Duration of Award:  1 year  2 years  3 years  Other: \_\_\_\_\_ (years)

**PART 3: ADDITIONAL INFORMATION**

Please answer the following questions regarding your company or organization:

1. Your company or organization is: *check one*:

For Profit  Not For Profit

2. Total number of employees whom you employ: \_\_\_\_\_

3. Total number of employees who will be assigned to work on the above-stated Award: \_\_\_\_\_

4. Do you anticipate hiring any additional employees?

Yes  No

*If yes*, how many additional F.T.E.s do you plan to hire? \_\_\_\_\_

**PART 4: EXEMPTION FROM FIRST SOURCE HIRING AGREEMENT PROVISIONS OF THE BOSTON JOBS AND LIVING WAGE ORDINANCE**

Any Beneficiary who qualifies may request an Exemption from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance by completing the following:

I hereby request an exemption from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance for the following reason(s): Attach any pertinent documents to this Application to prove that you are exempt. Please check the appropriate box(es) below:

- The construction contract awarded by the City of Boston is subject to the state prevailing wage law; and
- Assistance awarded to youth programs, provided that the award is for stipends to youth in the program. "Youth Program" means any city, state, or federally funded program which employs youth, as defined by city, state, or federal guidelines, during the summer, or as part of a school to work program, or in other related seasonal or part-time program; and
- Assistance awarded to work-study or cooperative educational programs, provided that the Assistance is for stipends to students in the programs; and
- Assistance awarded to vendors who provide services to the City and are awarded to vendors who provide trainees a stipend or wage as part of a job training program and provides the trainees with additional services, which may include but are not limited to room and board, case management, and job readiness services, and provided further that the trainees do not replace current City funded positions.

Please give a full statement describing in detail the reasons you are exempt from the First Source Hiring Agreement provisions the Boston Jobs And Living Wage Ordinance (attach additional sheets if necessary):

NAD LLC is a for-profit entity with less than 25 full time equivalent employees  
\_\_\_\_\_  
\_\_\_\_\_

THIS FORM APPROVED AS TO FORM BY CORPORATION COUNSEL 2 JUNE 2000

**PART 5. GENERAL WAIVER REASON(S)**

I hereby request a General Waiver from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance. The application of the First Source Hiring Agreement provisions to my Assistance violates the following state or federal statutory, regulatory or constitutional provision or provisions.

State the specific state or federal statutory, regulatory or constitutional provision or provisions, which makes compliance with the First Source Hiring Agreement provisions unlawful:

---

---

---

**GENERAL WAIVER ATTACHMENTS:**

Please attach a copy of the conflicting statutory, regulatory or constitutional provisions that makes compliance with this ordinance unlawful.

Please give a full statement describing in detail the reasons the specific state or federal statutory, regulatory or constitutional provision or provisions makes compliance with the First Source Hiring Agreement provisions unlawful (attach additional sheets if necessary):

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**PART 6: BENEFICIARY OF ASSISTANCE AFFIDAVIT:**

I, (print or type) William Madsen Hardy, the Beneficiary, certify and swear/affirm that the information provided on this **Beneficiary Affidavit** is true and within my own personal knowledge and belief.

Signed under the pains and penalties of perjury.

SIGNATURE:  DATE: 2/14/18

TITLE: Owner

THIS FORM APPROVED AS TO FORM BY CORPORATION COUNSEL 2 JUNE 2000

### 1.3.5 Project Summary Form

#### Project Summary Form

Project Name: Highland Yard

Project Street Addresses: 273, 276, 277, 279, 281, 283 and 287 Highland Street, Roxbury

Developer: New Atlantic Development LLC

Types of Units: Family  Individuals  Elderly  Special Needs

Other? (Describe) \_\_\_\_\_ Commercial  Yes  No

Number of Units 18 Number of Affordable Units 12 Homeless Units 0

Number of Units	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
<80% AMI				6			
<100% AMI				6			
Market				6			

Sales Prices	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
<80% AMI				238,000			
<100% AMI				320,000			
Market				595,000			

#### **Housing Budget**

TDC \$ 8,315,100 TDC Per Unit \$ 461,950

Hard Cost/sf \$ 233 Hard Cost/unit \$ 277,745

Developer Fee & Overhead \$ \_\_\_\_\_

#### **Funding Sources** (Check all that apply)

- |                  |                                     |               |                          |              |                          |         |                          |
|------------------|-------------------------------------|---------------|--------------------------|--------------|--------------------------|---------|--------------------------|
| DND – HOME       | <input type="checkbox"/>            | DHCD – HOME   | <input type="checkbox"/> | DHCD-CIPF    | <input type="checkbox"/> | Others: | <input type="checkbox"/> |
| HSNG Boston 2030 | <input type="checkbox"/>            | DHCD – HSF    | <input type="checkbox"/> | 9% LIHTC     | <input type="checkbox"/> |         | <input type="checkbox"/> |
| NHT              | <input checked="" type="checkbox"/> | DHCD – HIF    | <input type="checkbox"/> | 4% LIHTC     | <input type="checkbox"/> |         | <input type="checkbox"/> |
| IDP              | <input checked="" type="checkbox"/> | DHCD – TOD    | <input type="checkbox"/> | NMTC         | <input type="checkbox"/> |         | <input type="checkbox"/> |
| FHLB             | <input type="checkbox"/>            | DHCD – CATNHP | <input type="checkbox"/> | Historic TC  | <input type="checkbox"/> |         | <input type="checkbox"/> |
| AHTF             | <input type="checkbox"/>            | DHCD – CBH    | <input type="checkbox"/> | MA Sate TC   | <input type="checkbox"/> |         | <input type="checkbox"/> |
| MTC Grants       | <input type="checkbox"/>            | DHCD – FCF    | <input type="checkbox"/> | HUD Sect 202 | <input type="checkbox"/> |         | <input type="checkbox"/> |

### 1.3.6 Proposal Form - Price

#### PROPOSAL FORM

**SUBMITTED TO:** DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT  
**BID COUNTER**  
**26 COURT STREET, 10<sup>TH</sup> FLOOR**  
**BOSTON, MASSACHUSETTS 02108**

**DATE RECEIVED BY DND:** \_\_\_\_\_

**SUBMITTED BY: NAME:** William Madsen Hardy

**ADDRESS:** 236 Huntington Ave, Ste 314  
Boston, MA 02115

**TELEPHONE:** 617-335-8821

**EMAIL:** bill@newatlantic.net

Under the conditions set forth by the Department of Neighborhood Development, the accompanying proposal is submitted for:

**Property Address:** 273, 275, 277, 279, 281, 283 & 287 Highland Street, Roxbury

For this proposal to be properly evaluated all questions must be answered by the Proposer. The Awarding Authority (the Department of Neighborhood Development) will regard all responses to questions and all submissions as accurate portrayals of the Proposer's qualifications and any discrepancy between these statements and any subsequent investigation may result in the proposal being rejected.

- i. The name(s) and address(es) of all persons participating in this application as principals other than the undersigned are:

Brian Goldson  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Use separate sheet and attach if additional principals are involved.

- ii. The applicant is a/an:  
MA Limited Liability Company  
(Individual/Partnership/Joint/Venture/Corporation/Trust, etc.)

- A. If applicant is a Partnership, state name and residential address of both general and limited partners: William Madsen Hardy - Owner/Manager  
Brian Goldson - Owner/Manager

B. If applicant is a Corporation, state the following:

Corporation is incorporated in the State of: \_\_\_\_\_  
President is: \_\_\_\_\_  
Treasurer is: \_\_\_\_\_  
Place of Business: \_\_\_\_\_

C. If applicant is a Joint Venture, state the names and business addresses of each person, firm or company that is a party to the joint venture:

\_\_\_\_\_  
\_\_\_\_\_

A copy of the joint venture agreement is on file at: \_\_\_\_\_ and will be delivered to the Official on request.

D. If applicant is a Trust, state the name and residential address of all Trustees as:

\_\_\_\_\_  
\_\_\_\_\_

Trust documents are on file at \_\_\_\_\_  
And will be delivered to the Official on request.

- iii. Bank reference(s): Rusty Stieff, Boston Private Bank 617.912.4440
- iv. If business is conducted under any title other than the real name of the owner, state the time when, and place where, the certificate required by General Laws, c.110, §5 was filed:  
\_\_\_\_\_
- v. Number of years organization has been in business under current name:  
15
- vi. Has organization ever failed to perform any contract? No Yes/No

If answer is "Yes", state circumstances): \_\_\_\_\_  
\_\_\_\_\_

We propose the following purchase price: 1000

vii. AUTHORIZATION:

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

[Signature]  
Signature of individual submitting proposal

Owner/Manager  
Title

New Atlantic Development LLC  
Legal Name of Organization

Dated at: \_\_\_\_\_

This 9<sup>th</sup> day of February, 2018

NAME OF ORGANIZATION:  
New Atlantic Development LLC

BY: William Madsen Hardy

TITLE: Owner/Manager

i. ATTESTATION:

William Madsen Hardy being duly sworn deposes and says that (he/she) is the Owner/Manager of New Atlantic Development LLC and that all answers to foregoing questions and all statements contained herein are true and correct.

Subscribed and sworn before me this 9<sup>th</sup> day of February, 2018

Notary Public: [Signature]

My Commission Expires: April, 2022  
(Month) (Year)

NOTE: This proposal form must bear the written signature of the applicant.



DICK GEE  
Notary Public  
Commonwealth of Massachusetts  
My Commission Expires April 22, 2022



# PART 2:

# DEVELOPER'S PROPOSAL SUMMARY

## 2.1 Introduction

### 2.1.1 Project Narrative

#### Project Narrative

In response to the Department of Neighborhood Development's Request for Proposals - Highland and Marcella Streets, New Atlantic Development is pleased to propose the development of 18 units of E+, mixed-income, homeownership housing (condominium units) on the parcels identified as "Package 4". In partnership with our experienced team we have conceived a project that utilizes the expertise of individual team members to provide inspired, contemporary design, highlighting the project's sustainable features, while pushing the limits of the E+ housing model. This project will bring new life to underutilized lots in the midst of a vibrant neighborhood, and to help reconnect the Jackson Square and Highland Park neighborhoods with home ownership opportunities. We look forward to working with the city and community partners to produce new homes that fulfill the neighborhood vision by maximizing the use of a local, diverse work force, and creating much needed housing for a variety of income levels.

This project provides many important opportunities:

- Continue New Atlantic Development's collaboration with the City and neighborhood partners to develop 18 critically-needed affordable and market rate homeownership opportunities for Boston's workforce;
- Permanently deed restrict 6 80% AMI units and 6 100% AMI units;
- Redevelop the site in a sensitive way that is consistent with neighborhood preferences as expressed in the RFP based on community hearings sponsored by DND;
- Create an attractive new building that will activate the streetscape and enhance the neighborhood;
- Utilize and promote green building standards consistent with the Boston E+ Green Building Program, including the goal of achieving a net energy positive building.
- Strengthen the Highland Park neighborhood by filling long-vacant lots ;
- Maximize the hiring of Women and Minority Owned Businesses in keeping with City of Boston Policies;
- Promote local employment and job training opportunities through efforts to hire Boston residents; and
- Provide increased annual property tax revenue to the City of Boston by generating new development at this formerly tax-exempt site.

#### Eligibility Criteria:

- 1. Proposal Received by Deadline**  
The proposal has been submitted prior to February 14<sup>th</sup> at 4 pm.
- 2. Complete Proposal Submission**  
The proposal contains all required information, including all required signatures and certifications.
- 3. Compliance with Development Objectives**  
The proposal complies with the Site Specific Guidelines and the General Guidelines.

**General Evaluation Criteria:**

**1. Developer Experience and Capacity**

New Atlantic Development has been actively developing properties in Boston since 1994. We have completed 14 projects in Boston, as well as many others in surrounding communities. All projects completed to date have had a social mission behind them, as we are dedicated to enhancing urban areas for the benefit of low-income households, homeless persons, special needs populations, the elderly, artists and others.

Currently, we are completing construction on two special needs housing developments, which will be complete by the summer of 2018. We have no other active projects in the pipeline and will have full capacity to dedicate to this project.

The development team assembled for this project have a proven track record, demonstrating their capacity in innumerable affordable housing projects in the City of Boston. Many team members were instrumental in the successful completion of one of the first the E+ Projects on Catherine Street in Jamaica Plain. The team includes:

Project Developer	New Atlantic Development LLC 236 Huntington Ave, Suite 314 Boston, MA 02115 William Madsen Hardy - <a href="mailto:bill@newatlantic.net">bill@newatlantic.net</a> - 617.335.8821 Brian Goldson - <a href="mailto:brian@newatlantic.net">brian@newatlantic.net</a> - 617.872.0948
Architect	Utile 115 Kingston Street Boston, MA 02111 Michael LeBlanc - <a href="mailto:leblanc@utiledesign.com">leblanc@utiledesign.com</a> - 617.423.7200 Matthew Littell - <a href="mailto:littell@utiledesign.com">littell@utiledesign.com</a> - 617.423.7200
HERS Rater/Sustainability	Advanced Building Analysis (WBE) 2 Woodlawn Street Amesbury, MA 01913 Mike Browne - <a href="mailto:mike@advancedbuildinganalysis.com">mike@advancedbuildinganalysis.com</a> - 978.270.3911
General Contractor	NEI General Contracting 27 Pacella Park Drive Randolph, MA 02368 Marc Marcelli - <a href="mailto:mmarcelli@neigc.com">mmarcelli@neigc.com</a> - 617.445.5100
Attorney	Klein Hornig LLP 101 Arch Street, Suite 1101 Boston, MA 02110 Joseph Lieber - <a href="mailto:jlieber@kleinhornig.com">jlieber@kleinhornig.com</a> - 617.224.0605

Licensed Site Professional	Cooperstown Environmental LLC (WBE) 23 Main Street Andover, MA 01810 Jim Curtis - <a href="mailto:jim@cooperstownenv.com">jim@cooperstownenv.com</a> - 978.470.4755
Surveyor/Civil	Samiotes Consultants, Inc. (WBE) 20 A Street Framingham, MA 01701 Steve Garvin - <a href="mailto:sgarvin@samiotes.com">sgarvin@samiotes.com</a> - 508.877.6688
Landscape Architect	Offshoots, Inc. (WBE) 547 Rutherford Avenue Charlestown, MA 02129 Kate Kennen - <a href="mailto:kate@offshootsinc.com">kate@offshootsinc.com</a> - 617.500.6530
Structural Engineer	RSE Associates, Inc. 63 Pleasant Street, Suite 300 Watertown, MA 02472 Jennifer McClain - <a href="mailto:jmccclain@rseassociates.com">jmccclain@rseassociates.com</a> - 617.926-9300
MEP Engineer	BLW Engineers, Inc. 311 Great Road PO Box 1551 Littleton, MA 01460 Kenneth Beck - <a href="mailto:kbeck@blwengineers.com">kbeck@blwengineers.com</a> - 978-486-4301

## 2. Plan of Development

The project involves the new construction of a 21,402 square foot building containing 18 two-bedroom units, 16 of which are duplexes and 2 are flats. As specified in the RFP, 1/3<sup>rd</sup> of the units will be available to households earning below 80% of Area Median Income, 1/3<sup>rd</sup> will be below 100% of AMI and 1/3<sup>rd</sup> will be market rate. Sales prices for the 80% and 100% AMI units are as specified in the RFP. Sales prices for the market rate units have been budgeted based on conversations with local real estate agents. According to them, this neighborhood has yet to top \$600 per square foot for sales prices. Given the dynamic changes to the Fort Hill neighborhood as well as Jackson Square, and the fact that these units will be coming online in 2 years, we believe sales prices approaching \$600 per square foot are appropriate.

For more information on the overall development plan, see section 2.2.1.

## 3. Design Concept

Our primary goals are to produce a high-quality building that enhances the streetscape and to create highly efficient units to meet the net energy positive goals of the Boston E+ Green Building Program. This building will provide tremendous benefits not only to the ultimate unit owners and the environment, but will also serve as a model for future development across the city. For further details and information on the design and green/sustainable features and performance, please see sections 2.3 and 2.4.

#### **4. Development Cost Feasibility**

The proposed project cost is consistent with similarly scaled projects in the city. We believe that the additional costs associated with the sustainability features (“PV” - photovoltaic system, high R-value envelope, etc. ) will be predominantly offset by the ability reduce the capacity of the mechanical systems due to the reduced demand. Additionally, we plan to take maximum advantage of solar tax credits and energy rebates. The hard cost estimate included in our proposal has been provided by NEI General Contracting based on the design prepared by Utile, developed in close coordination with our HERS rater, Advanced Building Analysis. The soft costs are based on our experience with similar projects. In the face of rising costs, we have attempted to maximize efficiency in our design and construction methods.

The purchase price offered for the parcels is \$1,000. This is below the appraised value stated in the RFP. We are justifying this price by providing 12 of the 18 units as affordable. The market rate units will be subsidizing the cost of the 80% and 100% AMI units. Any increase in the purchase price of the property would increase the need for subsidy. The overall subsidy request is \$1,450,000, or \$120,883 per unit. Since the MA Dept. of Housing and Community Development is not currently subsidizing homeownership projects, the entire subsidy must come from DND. The last affordable homeownership project we completed was Creighton Condominiums, which required a subsidy of \$143,750 per unit and was completed I 2009.

For more information and details on the sources and uses and financing, see section 2.2.3.

#### **5. Developer’s Financial Capacity**

New Atlantic Development has demonstrated its financial capacity by successfully completing numerous projects in the City of Boston over the past two decades. Most projects have been of a greater scale. The most recent project completed was a \$72,000,000 project containing 160 units plus retail space.

For more information on financial capacity, see section 2.2.7.

#### **6. Operational Plan**

The proposed project is a condominium and therefore we will have no on-going operational role once completed and sold. We will work with the new Condo Board and advise them in hiring a management company that is best suited for the building.

#### **7. Development Schedule**

A full development timeline is included in section 2.2.2. We will work diligently to execute the project from the first day that we are designated. Given that we are not seeking state subsidies, the timing will predominately be dictated by the schedule of the zoning process.

## 2.1.2 Ownership Structure

### **Ownership Structure**

The applicant, New Atlantic Development LLC, is a two-member Massachusetts limited liability company. The two members, who each own 50% of the company, are William Madsen Hardy and Brian Goldson.

If we are designated as the developer for this project, it is likely that we will create a single-purpose limited liability company to act as owner and borrower. The new LLC will have a single member, which will be New Atlantic Development LLC. No other individuals or entities will have a financial interest in the project other than William Madsen Hardy and Brian Goldson.

## 2.2 Development Plan

### 2.2.1 Development Plan / Timeline

#### Development Plan

The following timeline shows all of the major critical path items to take the project from the initial proposal to the sale of the final unit.

	2018												2019												2020					
	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	
Submission	█																													
Design	█			█	█	█	█	█	█	█																				
Community Presentations		█																												
Tentative Designation				█																										
Article 80				█	█	█	█	█	█																					
ZBA				█	█	█	█	█	█																					
Due Diligence				█	█	█	█	█	█																					
Bidding										█	█	█																		
Permitting										█	█	█																		
Financing										█	█	█																		
Closing										█	█	█																		
Construction													█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█		
Marketing													█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█		
Sales																										█	█	█	█	

#### Submission

The development proposal has been completed and submitted this current month of February 2018.

#### Design

A significant amount of time has been spent by the architect and applicant in developing schematic plans for the site. Following tentative designation, further refinement of the schematic plans will be completed based on input from community presentations, feedback from DND and further study of the topography of the site. By June of 2018, we will be ready to submit a permit set to ISD for rejection, commencing the ZBA process. During this process, which will be concurrent with the Article 80 Small Project review process, we will continue to develop the plans through design development, culminating in a bid set and construction documents.

## **Community Presentation**

According to the RFP, DND will sponsor community presentations in March 2018.

## **Tentative Designation**

According to the RFP, DND intends to award the project in May of 2018.

## **Article 80**

Immediately following tentative designation, the development team will compile and submit an Article 80 Small Project Review package to the BPDA. It is anticipated that this process will culminate with a Scoping Determination and board vote by the end of October 2018.

## **Zoning Board of Appeals**

Navigating the ZBA process will be a collaborative effort between the applicant, its architect and its attorney. The process will commence with the submission of a permit application “for rejection” in June of 2018. It is anticipated that this process will take 5 months.

## **Due Diligence**

Concurrent with the Article 80 and ZBA processes, the applicant will commence typical due diligence for real estate projects. This will include, among other things, title review, lining up insurance, an appraisal and market study for the construction lender and further environmental testing. The Phase I Environmental Assessment provided by DND along with the RFP shows that the parcels are contaminated with lead, cadmium and PAHs. The cost of remediation will be significant. As discussed in section 2.2.3, we have budgeted \$368,000 for soil remediation. While we feel this is a reasonable estimate, it is based on limited information. If further subsoil testing during the due diligence period results in a significantly higher cost for clean-up, and the costs are not financeable, both DND and the applicant shall have the right to terminate the project.

## **Bidding**

Once the ZBA and Article 80 processes are completed, the applicant and its architect will work with the general contractor to prepare bid packages to be sent to subcontractors for all trades. Each subcontractor bid will be reviewed in terms of price, experience, references and W/MBE status.

## **Permitting**

Following the ZBA and Article 80 processes, the applicant, its architect and its general contractor will commence re-applying for a building permit. It is expected that this process will take 8 weeks and be complete by the beginning of January 2019.

## **Financing**

Given that the proposed project contains mixed-income, for-sale condominium units, the only subsidy source will come from DND, likely through the IDP program since 6 of the units are middle income (<100% AMI). This will avoid having to wait for one or more state subsidy

rounds. The applicant will submit a subsidy application to DND at whatever point is desired/necessary to have the funds available for closing in January of 2019. The only other source of funds that will be available at closing will be the construction loan, which will likely come from Boston Community Capital. BCC is a very nimble and flexible lender and will have no problem closing in a short period of time from hard commitment. There are two other sources of financing for the project that will be available later in the construction period. The first is the Brownfields tax credits. These credits cannot be awarded by the Department of Revenue until the costs that make up the basis from which they are derived are incurred. These funds should be available during the latter half of the construction period. The final source is from energy/sustainability rebates, which will come at the end of construction.

### **Closing**

As stated, it is anticipated that the construction closing will occur in January of 2019.

### **Construction**

We are assuming a construction start date of February 1, 2019 and a total period of 12 months.

### **Marketing**

There are two components to the overall marketing effort. The first relates to the marketing of the 80% and 100% AMI units. At closing, the applicant will have an approved Affirmative Fair Housing and Marketing Plan. The affirmative marketing will begin in August of 2019 and involve affirmative outreach and advertising, an application period, a lottery, and post-lottery selection and approval. Around the same time, we will commence developing a marketing strategy for the market rate units. The strategy will be developed in tandem with a local real estate agency that is familiar with the neighborhood and surrounding markets. We are assuming a 5% brokerage fee for the market rate units. There will be no brokerage fees associated with the restricted units, as all marketing and brokering will be done by the applicant.

### **Sales**

We are estimating a total sell-out period of 6 months following construction completion, with the final unit being sold in June of 2020.

## 2.2.2 Developer Pro Forma

### Developer Pro Forma

The pages attached to this section contain a Sources and Uses of Funds, a Sales Schedule and a Subsidy Schedule. Together, they constitute the Developer Pro Forma. Also attached, in support of the costs contained in the Sources and Uses, are a schedule of values prepared by NEI General Contracting reflecting the Construction cost as well as a letter from the environmental consultant, Cooperstown Environmental, regarding their review of the environmental reports and estimates for potential remediation costs.

#### Sources and Uses of Funds

The following are notes on the sources of funds:

##### Construction Loan

We anticipate receiving a loan commitment from Boston Community Capital in an amount equal to 90% of the projected sales proceeds. Details of the loan can be found in the Financing Letter of Interest in section 2.2.5.

##### Condo Sales

The prices for the 80% and 100% AMI units are as specified in the RFP. The market rate sales prices are based on conversations with local area brokers and a look at what units are selling for on the open market. To date, this neighborhood has yet to see sales prices reaching \$600 per square foot, even for smaller units. We feel a sales per square foot of \$570 to \$590 psf is achievable for condo units this size

##### DND/IDP

A total subsidy of \$1,450,000 is needed to bridge the gap between the total development costs and other available sources of funds. On a per-restricted-unit basis, this comes to \$120,833. For comparison, the last homeownership project we completed was Creighton Condominiums, which required a per-unit subsidy of \$143,750. That project was completed in 2009. In exchange for the subsidy, the 12 affordable units will be deed restricted in perpetuity.

##### Energy Rebates

The estimated total amount of rebates is \$50,600. This consists of \$17,600 from MassSave (multifamily) and \$33,000 from the Mass Clean Energy Center. These estimates are from Advanced Building Analysis, our energy consultant.

##### Brownfields Tax Credits

This tax credit will be available to help offset some of the costs of remediation on the property. The credit, which is calculated at 25% of costs, can be sold for \$0.90 on the dollar. Cooperstown Environmental, our LSP, is the largest syndicator of Brownfields Tax Credits in Massachusetts and will aid us in applying for and selling the credits as soon as the costs are incurred.

The following are notes on the major cost categories contained in the budget:

Construction

The Construction contract amount of \$4,999,419 is based on the estimate provided by NEI General Contracting. This amounts to a cost per square foot of \$233, which is consistent with similar highly energy efficient projects in Boston.

Remediation

We have budgeted \$368,000 for Remediation costs. This estimate is the mid-range of the reasonably expected costs provided by Cooperstown Environmental based on their review of available environmental assessments. Please see the attached letter from Cooperstown included in this section.

Other Hard Costs

The costs for the PV Panels and Window Guards are based on our experience with similar projects as well as, in the case of the PV Panels, discussions with solar installers/retailers.

A/E Design & Inspection

The budgeted amount is equal to 6% of the Contract amount plus the PV Panel amount, which the architects are designing.

Legal

We have budgeted \$125,000 for Developer Legal and \$25,000 for DND Legal. The amount for the developer is higher than usual due to the fact that we will have to go through a variance process.

Construction Loan Interest

The amount is based on a schedule of draws, a 6.5% interest rate, a 6-month sell-out period, plus a contingency.

Developer Overhead and Fee

The total amount is less than DND's maximum allowed fee based on the costs of the project. It is assumed that one-half of the overhead will be paid at closing, with the other half paid over the construction period in equal installments. The fee amount will be paid last, from the final condo sale.

**Sales Schedule**

The Sales Schedule shows the sales price of each individual unit, along with the gross and net square footages. All of the two-bedroom units are around 1,000 sf. The 80% and 100% AMI units will be sold at prices dictated by DND policy. The market rate sales prices are, as discussed, based on current and projected market conditions. The average sale price is \$595,000 per unit. Some units might be a little higher or lower based on location in the building/views/layout.

**Subsidy Schedule**

The attached Subsidy Schedule demonstrates that the DND/IDP subsidy is only being used in the restricted units. In order to pay for the full costs of the restricted units, subsidy from the market units as well as the Energy Rebates and Brownfields Tax Credits are needed.

Highland Yard Sources and Uses of Funds 02/13/18			
<u>Sources</u>		Per Unit	
Construction/Bridge Loan	\$6,226,200	\$345,900	
Repay Const/Bridge Loan	(\$6,226,200)	(\$345,900)	
Condo Sales	\$6,918,000	\$384,333	
DND/IDP	\$1,450,000	\$80,556	\$120,833
Energy Rebates	\$50,600	\$2,811	(per restricted unit)
Brownfields Tax Credit Equity	\$75,000	\$4.167	
<b>Total</b>	<b>\$8,493,600</b>		
Gap	\$0		
<u>Uses</u>		Cost	Per Unit
ACQUISITION			
Land	\$1,000	\$56	
subtotal	\$1,000	\$56	
HARD COSTS			
Construction	\$4,999,419	\$277,746	\$233.60
Remediation	\$368,000	\$20,444	
PV Panels	\$127,147	\$7,064	
Window Guards	\$7,200	\$400	
Contingency	\$268,371	\$14,909	5.00%
subtotal	\$5,770,137	\$320,563	
SOFT COSTS			
A/E Design & Inspection	\$307,593.96	\$17,089	6.0%
Sustainability Consulting/LEED Certification	\$40,000	\$2,222	
Construction Testing	\$15,000	\$833	
Bond	\$53,674	\$2,982	
Survey & Permits	\$73,674	\$4,093	
Utility Backcharges	\$25,000	\$1,389	
Environmental Assessment	\$30,000	\$1,667	
Environmental Contingency	\$15,000	\$833	
Clerk	\$80,000	\$4,444	
Insurance	\$70,000	\$3,889	
RE Taxes	\$17,500	\$972	
Title and Recording	\$50,000	\$2,778	
Appraisal/Market Study	\$15,000	\$833	
Marketing	\$40,000	\$2,222	
Lender Inspection	\$20,000	\$1,111	
Accounting/Cost Cert	\$20,000	\$1,111	
Legal Developer	\$125,000	\$6,944	
DND	\$25,000	\$1,389	
Const Loan Fees	\$133,393	\$7,411	
Const Loan Int	\$320,827	\$17,824	
Pre-Sale Condo Fees/Utilities	\$64,800	\$3,600	
Broker Fees on Market Units	\$178,500	\$9,917	
Developer Overhead	\$467,500	\$25,972	
Developer Fee	\$467,500	\$25,972	
Soft Cost Contingency	\$67,500	\$3,750	2.5%
subtotal	\$2,722,463	\$151,248	
<b>Total Development Costs</b>	<b>\$8,493,600</b>	<b>\$471,867</b>	psf \$397

Highland Yard Sales Schedule 02/13/18					
Unit	BR	Income	GSF	NSF	Price
Unit 1	2 BR	80%	1091	934	\$ 238,000
Unit 2	2 BR	80%	1174	1005	\$ 238,000
Unit 3	2 BR	80%	1216	1041	\$ 238,000
Unit 4	2 BR	100%	1152	986	\$ 320,000
Unit 5	2 BR	100%	1174	1005	\$ 320,000
Unit 6	2 BR	100%	1216	1041	\$ 320,000
Unit 7	2 BR	Market	1174	1005	\$ 595,000
Unit 8	2 BR	Market	1174	1005	\$ 595,000
Unit 9	2 BR	Market	1174	1005	\$ 595,000
Unit 10	2 BR	80%	1174	1005	\$ 238,000
Unit 11	2 BR	80%	1216	1041	\$ 238,000
Unit 12	2 BR	80%	1216	1041	\$ 238,000
Unit 13	2 BR	100%	1174	1005	\$ 320,000
Unit 14	2 BR	100%	1216	1041	\$ 320,000
Unit 15	2 BR	100%	1216	1041	\$ 320,000
Unit 16	2 BR	Market	1216	1041	\$ 595,000
Unit 17	2 BR	Market	1216	1041	\$ 595,000
Unit 18	2 BR	Market	1216	1041	\$ 595,000
Total			21,402	18,324	\$ 6,918,000

Highland Yard Subsidy Schedule 02/13/18					
Unit	Price	TDC	Subsidy Needed	DND/IDP Subsidy	Market/Other Subsidy
Unit 1	\$ 238,000	\$ 432,931	\$ 194,931	\$ 120,833	\$ 74,097
Unit 2	\$ 238,000	\$ 465,841	\$ 227,841	\$ 120,833	\$ 107,008
Unit 3	\$ 238,000	\$ 482,528	\$ 244,528	\$ 120,833	\$ 123,694
Unit 4	\$ 320,000	\$ 457,034	\$ 137,034	\$ 120,833	\$ 16,201
Unit 5	\$ 320,000	\$ 465,841	\$ 145,841	\$ 120,833	\$ 25,008
Unit 6	\$ 320,000	\$ 482,528	\$ 162,528	\$ 120,833	\$ 41,694
Unit 7	\$ 595,000	\$ 465,841			\$ -
Unit 8	\$ 595,000	\$ 465,841			\$ -
Unit 9	\$ 595,000	\$ 465,841			\$ -
Unit 10	\$ 238,000	\$ 465,841	\$ 227,841	\$ 120,833	\$ 107,008
Unit 11	\$ 238,000	\$ 482,528	\$ 244,528	\$ 120,833	\$ 123,694
Unit 12	\$ 238,000	\$ 482,528	\$ 244,528	\$ 120,833	\$ 123,694
Unit 13	\$ 320,000	\$ 465,841	\$ 145,841	\$ 120,833	\$ 25,008
Unit 14	\$ 320,000	\$ 482,528	\$ 162,528	\$ 120,833	\$ 41,694
Unit 15	\$ 320,000	\$ 482,528	\$ 162,528	\$ 120,833	\$ 41,694
Unit 16	\$ 595,000	\$ 482,528			\$ -
Unit 17	\$ 595,000	\$ 482,528			\$ -
Unit 18	\$ 595,000	\$ 482,528			\$ -
Total	\$ 6,918,000	\$ 8,493,600	\$ 2,300,494	\$ 1,450,000	\$ 850,494



Marcella Highland  
Roxbury, MA  
February 11, 2018

**Project Overview**

Floor	SF	# of Units
1st Floor	5,350 sf	8 Units
2nd Floor	5,351 sf	1 Units
3rd Floor	5,350 sf	9 Units
4th Floor	5,351 sf	0 Units
<b>Total:</b>	<b>21,402 sf</b>	<b>18 Units</b>

**Exhibit A  
Schedule of Values**

Section	Description	Owner Contract
312300	Earth Moving - Excludes soil disposal carried separately by Owner	\$ 299,628
	Ledge Removal Allowance	\$ 50,000
329300	Plants	\$ 53,505
323223	Segmented Retaining Wall	\$ 49,225
033000	Cast in Place Concrete	\$ 214,020
035412	Cementitious Underlayment	\$ 60,996
042000	Unit Masonry	
051200	Miscellaneous Metals	\$ 39,594
061000	Rough Carpentry - Trusses & Joists	\$ 642,060
064020	Interior Architectural Woodwork	\$ 181,917
072100	Thermal Insulation	\$ 107,010
074200	Metal Wall Panels	
074610	Fiber Cement Siding	\$ 299,628
075400	Thermoplastic Membrane Roofing	\$ 78,778
081110	Hollow Metal Doors & Frames	\$ 85,608
083110	Access Doors and Frames	
084110	Aluminum Framed Entrances & Storefront	
085413	Fiberglass Windows	\$ 64,206
089000	Louvers & Vents	\$ 856
092110	Gypsum Board Assemblies	\$ 428,040
096510	Resilient Flooring & Accessories	\$ 181,917
099000	Painting and Coating	\$ 85,608
101400	Signage	\$ 6,421
102600	Wall & Door Protection	
102800	Toilet Accessories	\$ 10,701
104400	Fire Protection Specialties	\$ 1,498
105500	Postal Specialties	\$ 2,140
107110	Exterior Sun Control	\$ 85,608
113100	Appliances	\$ 39,594
122110	Horizontal Louver Blinds	
122400	Shades	\$ 7,200
123570	Residential Casework	\$ 74,907
129310	Bicycle Racks	\$ 1,500
210000	Fire Protection	\$ 76,833
220000	Plumbing	\$ 310,329
230000	HVAC	\$ 342,432
260000	Electrical	\$ 353,133

<b>SUBTOTAL</b>	<b>\$ 4,234,891</b>
General Conditions	\$ 404,562
Overhead	3.00% \$ 127,047
Fee	3.00% \$ 127,047
Contingency	2.50% \$ 105,872
Performance & Payment Bond	
Builder's Risk	
Workers Comp	0.35% NIC
Liability Insurance	1.15% NIC
Building Permit Fee	1.15% NIC
<b>BUILDING TOTAL</b>	<b>\$ 4,999,419</b>

Subtotal (Construction Cost) Cost per SF \$ 197.87  
 Total Cost per SF \$ 233.60  
 Total Cost per Unit \$ 277,745.48



February 6, 2018

Mr. Brian Goldson  
Mr. William Madsen-Hardy  
New Atlantic Development  
236 Huntington Ave. Suite 314  
Boston, MA 02115

Re: Estimate of potential soil remediation/disposal costs  
Redevelopment of Highland and Marcella Sites 1-7 Boston, MA

Dear Mr. Goldson and Mr. Madsen-Hardy

**Cooperstown Environmental LLC** (Cooperstown) is pleased to provide you with this estimate of potential soil remediation/disposal costs at the referenced site in Boston, MA.

#### **BACKGROUND**

The subject properties are currently owned by the City of Boston and the city is seeking proposals for redevelopment of the currently vacant sites (approximately 17,000 square feet) into 12-20 units of residential housing. Prior uses of the parcels include a former junk yard, automotive repair, and adjacent residences. The city has conducted a Phase I which you provided to us for review and which identified contaminants exceeding RCS-1 standards in shallow soils including lead, cadmium, and polynuclear aromatic hydrocarbons (PAHs) across the site. As part of the redevelopment plans into residential housing, the city has asked that a minimum of 3 feet of soil be removed from the site and replaced with clean fill for the residential project. Based on the plans and our discussions with you, we have developed potential costs for the removal and disposal of 3 to 4 feet of soil at the site as described below. As no disposal characterization sampling has evidently been conducted at the site thus far, these costs are estimates based on what information is currently available at the site and the likely scenarios and cost drivers of remediation and/or disposal of shallow soils from the site. Final cost estimates would need to be determined once complete disposal characterization testing has been performed on the soil.

#### **POTENTIAL REMEDIATION/DISPOSAL SCENARIOS AND ESTIMATES**

Based on the information we do have about the site, there is PAH, lead and cadmium in the soil, including surficial soils, above RCS-1 standards. The likely cost driver based on the analyses conducted thus far is going to be lead and cadmium in soil which may limit the disposal facilities available to accept this soil. Please keep in mind that for purposes of reporting, such as during a Phase I investigation, analysis is conducted for the contaminants that are likely to be present based on the past use of the site. In this case it was petroleum contaminants and metals. The laboratory data itself is not in the Phase I, only a discussion of what was detected above RCS-1 reportable concentrations. The report indicated lead in surface soils (0-1 feet bgs) at concentrations from 264 to 1080 mg/kg at sites 1 through 7 and

23 Main Street · Andover MA 01810 · T 978-470-4755 · [www.CooperstownEnv.com](http://www.CooperstownEnv.com)

Estimated Costs for Soil Remediation/Disposal  
Highland and Marcella parcels 1-7  
February 6, 2018  
Page 2 of 3

additional results above RCS-1 in soils down to 3' bgs (but no numbers are given) on sites 1-7. As we discussed on the phone, when it comes time to dispose of the soil, the facilities require a more complete analysis of anything that is possibly in the soil, including a complete scan for volatile organics, semi-volatile organics, PCBs, and hazardous waste characteristics (which includes toxicity characteristic leaching procedure (TCLP) analysis for elevated lead and cadmium concentrations). This is the big unknown regarding disposal costs at this point as these tests have not been conducted.

Cooperstown obtained estimated soil disposal prices to assist in planning for soil disposal costs. The current basic prices include transport estimates. Please keep in mind that these price estimates could change depending on how far out the remediation and redevelopment occurs. Based on current price estimates, likely scenarios and costs are as follows:

**In-state landfill: \$42/ton** (includes soils that pass TCLP analysis and have lead concentrations below 2000 mg/kg and otherwise meet landfill acceptance criteria).

**On-site Lead/Cadmium stabilization and subsequent transport to receiving facility: \$135/ton** (for soils that fail TCLP and need to be stabilized prior to disposal).

**Hazardous Waste Soils: \$350/ton** (for soils that can't be stabilized or contain some other contaminant at higher levels such as PCBs).

The most likely scenarios for disposal of 2500-3000 cubic yards from the site (3800-4500 tons) are as follows:

- All or most can go un-stabilized to in-state landfill: \$160,000-\$190,000 (Best Case)
- Half need stabilization prior to disposal, half don't (blended rate of \$88.50): \$336,000-\$400,000 (Realistic case)
- Based on the observed lead and cadmium concentrations thus far, it doesn't seem likely the entire project area would fail TCLP, but that would cost \$515,000-\$610,00 (worst case for main issue being TCLP metals related).

Any soils required to be disposed of as hazardous waste would obviously have large cost implications. As an example, if 1000 tons had to go as hazardous waste (\$350K), and the rest could go to an in-state landfill (120K-150K), costs would be approximately \$500,000. This type of situation might result if something unexpected shows up in the soil on the junkyard/automotive portion of the site (like PCBs), or we do a pilot stabilization test and determine the soil can't be adequately stabilized in-situ and must be disposed of as hazardous waste.

**COOPERSTOWN**  
environmental

Estimated Costs for Soil Remediation/Disposal  
Highland and Marcella parcels 1-7  
February 6, 2018  
Page 3 of 3

I hope this estimate helps in planning for potential redevelopment costs. If you have any questions, please contact me.

Very sincerely yours,  
**Cooperstown Environmental LLC**



Jeanne Westervelt PG, LSP  
Technical Services Director

**COOPERSTOWN**  
environmental

## 2.2.3 DND Pro Forma

### DND Pro Forma

The attached pages contain the project pro forma in DNDs format. Please note that the total development cost is not the same as on the Developer's Pro Forma. This is due to the fact that the developer's version treats the brokerage fees as a cost, whereas DND takes these fees out of the gross sales price.

Project Name: Highland Yard  
 Project Address: 273-287 Highland Street

**ADD ADDITIONAL COLUMNS AS NEEDED TO REFLECT INCOME LIMITS**

	<u>Original Total</u>	<u>Affordable Units Below 80% AMI</u>	<u>Affordable Units Below 100% of AMI</u>	<u>IDP Required On-Site Units</u>	<u>Market Rate</u>	<u>Commercial</u>
<b>Construction Financing</b>						
Construction Lender	\$6,226,200	\$1,428,000	\$2,539,800		\$2,258,400	
Developer Equity	\$0					
DND	\$1,450,000	\$1,343,700	\$106,300	n/a		
NHT	\$0			n/a		
DHDC (List sources of funding)	\$0			n/a		
Other Sources Deferred Closing Costs	\$45,800				\$45,800	
Other Sources Energy Rebate	\$50,600		\$50,600			
Other Sources Brownfields Tax Credit	\$75,000		\$75,000			
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Deferred Fee	\$467,500				\$467,500	
Market Rate Cross Subsidy	\$0					
<b>Total Construction Financing</b>	<b>\$8,315,100</b>	<b>\$2,771,700</b>	<b>\$2,771,700</b>	<b>\$0</b>	<b>\$2,771,700</b>	<b>\$0</b>
GAP	GAP	GAP	=====	GAP	=====	=====
<b>Surplus/Gap</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Permanent Financing</b>						
Sales Proceeds:	\$6,918,000	\$ 1,428,000	\$ 1,920,000	\$ -	\$ 3,570,000	\$ -
Brokerage Fees	-\$178,500	\$ -	\$ -	\$ -	\$ (178,500)	\$ -
Number of Ownership Units:	18	8	6	0	6	
Net Sales Proceeds:	\$6,739,500	\$1,428,000	\$1,920,000	\$0	\$3,391,500	
DND	\$1,450,000	\$1,343,700	\$106,300	n/a		
NHT	\$0			n/a		
DHDC (List sources of funding)	\$0			n/a		
Other Sources Energy Rebate	\$50,600		\$50,600			
Other Sources Brownfields Tax Credit	\$75,000		\$75,000			
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Deferred Equity	\$0					
Market Cross Subsidy	\$0		\$619,800		-\$619,800	
<b>Total Permanent Financing</b>	<b>\$8,315,100</b>	<b>\$2,771,700</b>	<b>\$2,771,700</b>	<b>\$0</b>	<b>\$2,771,700</b>	<b>\$0</b>
Surplus/Gap	<b>(\$0)</b>	<b>0</b>	<b>\$0</b>		<b>\$0</b>	

Owner Downpayment may include homebuyer assistance form DND or others, which will total 5%.

	<u>Affordable Units Below 80% AMI</u>	<u>Affordable Units Below 100% of AMI</u>	<u>IDP Required On-Site Units</u>	<u>Market Rate</u>
0 BR				
1 BR				
2 BR	18	6	6	6
3 BR				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
<b>Total</b>	<b>18</b>	<b>6</b>	<b>6</b>	<b>6</b>

Project Name: Highland Yard  
 Project Address: 273-287 Highland Street

**ADD ADDITIONAL COLUMNS AS NEEDED TO REFLECT INCOME LIMITS**

	<b>Original Total</b>	<b>Affordable Units Below 80% AMI</b>	<b>Affordable Units Below 100% of AMI</b>	<b>IDP Required On-Site Units</b>	<b>Market Rate</b>	<b>Commercial</b>
<b>Construction Financing</b>						
Construction Lender	\$6,226,200	\$1,428,000	\$2,539,800		\$2,258,400	
Developer Equity	\$0					
DND	\$1,450,000	\$1,343,700	\$106,300	n/a		
NHT	\$0			n/a		
DHDC (List sources of funding)	\$0			n/a		
Other Sources Deferred Closing Costs	\$45,800				\$45,800	
Other Sources Energy Rebate	\$50,600		\$50,600			
Other Sources Brownfields Tax Credit	\$75,000		\$75,000			
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Deferred Fee	\$467,500				\$467,500	
Market Rate Cross Subsidy	\$0					
<b>Total Construction Financing</b>	<b>\$8,315,100</b>	<b>\$2,771,700</b>	<b>\$2,771,700</b>	<b>\$0</b>	<b>\$2,771,700</b>	<b>\$0</b>
GAP	GAP	GAP	GAP	=====	GAP	=====
<b>Surplus/Gap</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Permanent Financing</b>						
Sales Proceeds:	\$6,918,000	\$1,428,000	\$1,920,000	\$-	\$3,570,000	\$-
Brokerage Fees	-\$178,500	\$-	\$-	\$-	\$(178,500)	\$-
Number of Ownership Units:	18	8	6	0	6	
Net Sales Proceeds:	\$6,739,500	\$1,428,000	\$1,920,000	\$0	\$3,391,500	
DND	\$1,450,000	\$1,343,700	\$106,300	n/a		
NHT	\$0			n/a		
DHDC (List sources of funding)	\$0			n/a		
Other Sources Energy Rebate	\$50,600		\$50,600			
Other Sources Brownfields Tax Credit	\$75,000		\$75,000			
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Other Sources (List Name)	\$0					
Deferred Equity	\$0					
Market Cross Subsidy	\$0		\$619,800		-\$619,800	
<b>Total Permanent Financing</b>	<b>\$8,315,100</b>	<b>\$2,771,700</b>	<b>\$2,771,700</b>	<b>\$0</b>	<b>\$2,771,700</b>	<b>\$0</b>
Surplus/Gap	(\$0)	0	\$0		\$0	

Owner Downpayment may include homebuyer assistance form DND or others, which will total 5%.

	<b>Affordable Units Below 80% AMI</b>	<b>Affordable Units Below 100% of AMI</b>	<b>IDP Required On-Site Units</b>	<b>Market Rate</b>
# of Units				
0 BR				
1 BR				
2 BR	18	6	6	6
3 BR				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
Building Type/Bedroom Type				
<b>Total</b>	<b>18</b>	<b>6</b>	<b>6</b>	<b>6</b>

2.2.4 One Stop

## Section 1 PROJECT DESCRIPTION

Name and Address of Project			
1 . Project Name:	<input style="width: 95%;" type="text" value="Highland Yard"/>		
1a . Application Completed By:	<input style="width: 95%;" type="text" value="New Atlantic Development LLC"/>		
1b . Original Application Date:	<input style="width: 100px;" type="text" value="2/14/18"/>	Application Revision Date:	<input style="width: 100px;" type="text"/>
2 . Project Address:	<input style="width: 95%;" type="text" value="273-287 Highland Street"/>		
3 . Neighborhood	<input style="width: 150px;" type="text" value="Roxbury"/>		
4 . City/ Town	<input style="width: 150px;" type="text" value="Boston"/>	<input style="width: 50px;" type="text" value="MA"/>	<input style="width: 100px;" type="text"/>
		<small>(state)</small>	<small>(zip code)</small>
5 . County	<input style="width: 150px;" type="text" value="SUFFOLK"/>		
6 . <input type="checkbox"/> Scattered sites			
7 . Is this a qualified census tract	<input type="text" value="No"/>	Enter a census tract	<input style="width: 50px;" type="text"/>
8 . Difficult to develop area	<input type="text" value="Yes"/>	QCT information last updated on:	<input style="width: 100px;" type="text" value="2/12/18"/>
Development Plan			
9 . Development Type (Please check all that apply.)			
<input type="checkbox"/> Yes	New construction		
<input type="checkbox"/> No	Acquisition, substantial rehab of existing housing		
<input type="checkbox"/> No	Acquisition, moderate rehab of existing housing		
<input type="checkbox"/> No	Acquisition, minimal or no rehab of existing housing		
<input type="checkbox"/> No	Adaptive re-use of non-residential structure		
10 . Proposed Housing Type	<input style="width: 95%;" type="text" value="Home Ownership"/>		
11 . Project Description:	Number of buildings:	<input style="width: 50px;" type="text" value="1"/>	
<div style="border: 1px solid black; min-height: 60px; margin-top: 5px;">Condominium</div>			
12 . Development Schedule:	<small>Original</small>	<small>Revised</small>	<small>Optional user comments</small>
Application Date	2/14/18		<div style="border: 1px solid black; min-height: 100px;"></div>
Construction Loan Closing	1/19		
Initial Loan Closing (MHFA only)			
Construction Start	2/19		
50% Construction Completion	8/19		
Construction Completion	2/20		
First Certificate of Occupancy	2/20		
Final Certificate of Occupancy	3/20		
Sustained Occupancy	8/20		
Permanent Loan Closing			

Highland Yard Application Date: 2/14/18 #VALUE!  
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 the MHP Fund. All rights reserved.

**13 . Unit Mix:**

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 80%	Other Income below 100%	Market Rate	Total Units
SRO						0
0 bedroom						0
1 bedroom						0
2 bedrooms			6	6	6	18
3 bedrooms						0
4 bedrooms						0
<b>Total Units</b>	0	0	6	6	6	18
Home Units*						0

\*HOME units included in the above total Other Income=Below 100% of median income

**# . Unit Size in square feet:**

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 80%	Other Income below 100%	Market Rate	Average All Incomes
SRO						N/A
0 bedroom						N/A
1 bedroom						N/A
2 bedrooms			1011.2	1019.8	1023.0	1,018
3 bedrooms						N/A
4 bedrooms						N/A

**15 . Number of bathrooms in each unit:**

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income below 100%	Market Rate	Average All Incomes
SRO						N/A
0 bedroom						N/A
1 bedroom						N/A
2 bedrooms			1.5	1.5	1.5	1.5
3 bedrooms						N/A
4 bedrooms						N/A

**16 . Funding Applied For:**

Please check all the funding that is being applied for at this time, with this application:

DHCD Tax Credit Allocation .....  No

Category .....  Not Applicable

Category .....  Not Applicable

HOME Funding through DHCD .....  No

Massachusetts Housing Finance Agency (select all that apply):

Official Action Status .....  No

Construction Financing/Bridge Financing.....  No

Permanent Financing .....  No

Massachusetts Housing Partnership (MHP) Fund:

Permanent Rental Financing Program .....  No

Massachusetts Housing Investment Corporation (select all that apply):

Debt Financing .....  No

Tax Credit Equity Investment .....  No

Boston Department of Neighborhood Development (D .....  Yes

Other .....  No

Other.....  N/A

Other.....  N/A

Other.....  N/A

Financing from MassDevelopment.....  No

	Total	New Construction	Rehabilitation
17. Number of buildings planned			
a. Single-Family	0		
b. 2-4 Family	0		
c. Townhouse	1	1	
d. Low/Mid rise	0		
e. High-rise	0		
f. Other	0		
TOTAL	1	1	0
18. Number of units:	18		
Error! Check Number Of Units For New Construction/ Rehabilitation			
19. Gross Square Footage			
a. Residential	21,402		
b. Commercial	-		
20. Net Rentable Square Footage:	Total	Percent of Gross	
a. Residential	18,324 s.f.	86%	
b. Commercial	s.f.	N/A	
21. Number of handicapped accessible units	1	Percent of total	6%
22. Fire Code Type	Concrete frame		
23. Will building(s) include elevators?	No		
24. Are the following provided with the housing units:			
a. Range?	Yes	Gas or electric?	
b. Refrigerator?	Yes		
c. Microwave?	Yes		
d. Dishwasher?	Yes		
e. Disposal?	Yes		
f. Washer/Dryer Hookup?	Yes		
g. Washer & Dryer?	No		
h. Wall-to-wall Carpet?	No		
i. Window Air Condition	No		
j. Central Air Condition	Yes		
25. Are the following included in the rent:			
a. Heat?	No	Optional user comments Utilities n/a for condo	
b. Domestic Electricity?	No		
c. Cooking Fuel?	No		
d. Hot Water?	No		
e. Central A/C, if any?	No		
26. Type of heating fuel:	Gas		
27. Total no. of parking spaces	9	Outdoor: 9	Enclosed:
28. Number of parking spaces exclusively for the use of tenants:			
a. Residential	Total: 9	Outdoor: 9	Enclosed:
b. Commercial	Total: 0	Outdoor:	Enclosed:

29 . Will rehabilitation require the relocation of existing tenants?

30 . Scope of rehabilitation: Please describe the following (or type N/A).

a. Major systems to be replaced:

b. Substandard conditions and structural deficiencies to be repaired:

c. Special features/adaptations for special needs clients to be housed:

31 . Are energy conservation materials in excess of the Building Code?

- a. Insulation .....  R-Value or type?
- b. Windows .....  R-Value or type?
- c. Heating system .....  R-Value or type?

**Information On Site And Existing Buildings**

	Square Feet	Acres
32 . Size of Site:	16,354	0.38
33 . Wetlands area:		
34 . Buildable area:	16,354	0.38

**Existing Conditions:**

35 . What is the present use of the property?

36 . Number of existing structures:

37 . Gross s.f. of existing structures:

38 . If rehabilitation:

	number of units	num. of bedrooms
a. Number of existing residential units/bedrooms:		
b. Number of units/bedrooms currently occupied:		

39 . If site includes commercial space:

a. Square footage of existing commercial space:	<input type="text"/>	square feet
b. Square footage currently occupied:	<input type="text"/>	square feet

40 . What are the surrounding land uses?

**Utilities:**

41 . Are the following utilities available on the site:

- a. Sanitary sewer?  Distance from site (ft.) 10
- b. Storm sewer?  Distance from site (ft.) 10
- c. Public water?  Distance from site (ft.) 10
- d. Electricity?  Distance from site (ft.) 10
- e. Gas?  Distance from site (ft.) 10

If any of the above are not available, is plan attached explaining how such service will be extended to the site?

Adjacent street has all utilities available

**Zoning:**

*Please include information on the property zoning in Exhibit 3. This should include a zoning map, highlighting any special use or dimensional restrictions on the property. If the present zoning does not allow for the proposed use, please explain current status and how approvals will be obtained*

42 . Does the present zoning allow the proposed development?  Yes  No

# . Have you applied for a zoning variance, change, special permit or suit?  Yes  No

44 . Do you anticipate applying for a comprehensive permit under?  Yes  No

**Site Control:**

45 . What form of site control do you have?

*Include copies of the appropriate site control documents as part of Exhibit 4.*

46 . Please provide details about your site control agreement.

- a. Name of Seller:
- b. Principals of seller corporation:
- c. Type of Agreement:
- d. Agreement Date:
- e. Expiration Date:
- f. Purchase price if under agreement:
- g. Is there any identity of interest between buyer and seller?

# . In the past three years, have there been any defaults on any mortgage on the property or any other forms of financial distress?

# . Are there any outstanding liens on the property?

*not certain at this time*

**Amenities and Services:**

# . Please indicate distance from site and locate on city/town map (Exhibit 1).

	Distance	
a. Shopping facilities .....	0.40	miles
b. Schools .....	0.60	miles
c. Hospitals .....	0.80	miles
d. Parks and recreational facilities .....	0.10	miles
e. Police station .....	0.80	miles
f. Fire station .....	0.60	miles
g. Public transportation .....	0.20	miles
h. Houses of worship .....	0.40	miles
i. City/Town Hall .....	3.50	miles

<b>Environmental Information</b>	
50 . Is there any evidence of underground storage tanks or releases or hazardous materials, including hazardous wastes, on the site or within close proximity to the site?	<input type="checkbox"/> Yes
51 . Has a Chapter 21E assessment been performed? <i>DND provided assessment info</i>	<input type="checkbox"/> Yes
52 . Does the project consist of either: (a) new construction of more than 100 units; or (b) substantial rehabilitation of more than 200 units, or where more than 10% new floor space is added?	<input type="checkbox"/> No
53 . Does the building require lead paint abatement?	<input type="checkbox"/> No
54 . Does the building require asbestos abatement?	<input type="checkbox"/> No
55 . Do radon tests show radon levels exceeding four picocuries/liter?	<input type="checkbox"/> No
56 . Is there any evidence that the premises are insulated with urea formaldehyde foam (UFFI)?	<input type="checkbox"/> No
57 . Is the site located in an historic district, or contain buildings listed or eligible for listing in the State Register of Historic Places?	<input type="checkbox"/> No
58 . Are there any above ground storage containers with flammable, explosive petroleum products or chemicals within 1/2 mile of the site?	<input type="checkbox"/> No
59 . Is the site located in a floodplain or wetlands area?	<input type="checkbox"/> No
60 . Does the site contain endangered animal or plant species?	<input type="checkbox"/> No
61 . Is the site subject to noise impact from jet airports within five miles, major highways within 1,000 feet, or rail traffic within 3,000 feet?	<input type="checkbox"/> No

Highland Yard

Application Date: 2/14/18

#VALUE!

## Section 2 DEVELOPMENT TEAM SUMMARY

62 . <b>Developer/Sponsor Type</b>	<table border="1" style="margin: auto;"> <tr> <td style="padding: 5px;">Limited dividend partnership</td> </tr> </table> <p style="text-align: center; margin-top: 10px;">Limited Liability Company</p>	Limited dividend partnership																										
Limited dividend partnership																												
63 . <b>Developer/Sponsor:</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Form of Legal Entity</td> <td colspan="2">Limited Liability Company</td> </tr> <tr> <td>Legal Name</td> <td colspan="2">New Atlantic Development LLC</td> </tr> <tr> <td>Address</td> <td colspan="2">236 Huntington Ave, Suite 314</td> </tr> <tr> <td> </td> <td colspan="2"> </td> </tr> <tr> <td>Contact Person</td> <td colspan="2">William Madsen Hardy</td> </tr> <tr> <td> </td> <td style="text-align: center;">Owner</td> <td style="text-align: center;">617-335-8821</td> </tr> <tr> <td>E-mail</td> <td colspan="2">bill@newatlantic.net</td> </tr> </table>	Form of Legal Entity	Limited Liability Company		Legal Name	New Atlantic Development LLC		Address	236 Huntington Ave, Suite 314					Contact Person	William Madsen Hardy			Owner	617-335-8821	E-mail	bill@newatlantic.net							
Form of Legal Entity	Limited Liability Company																											
Legal Name	New Atlantic Development LLC																											
Address	236 Huntington Ave, Suite 314																											
Contact Person	William Madsen Hardy																											
	Owner	617-335-8821																										
E-mail	bill@newatlantic.net																											
64 . <b>Owner/Mortgagor:</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Legal Name</td> <td colspan="2">Wholly-Owned Affiliate of Developer</td> </tr> <tr> <td>Address</td> <td colspan="2"> </td> </tr> <tr> <td> </td> <td colspan="2"> </td> </tr> <tr> <td>Has this entity already been formed</td> <td style="text-align: center;">No</td> <td> </td> </tr> <tr> <td>Principals</td> <td colspan="2"> </td> </tr> <tr> <td>Principals</td> <td colspan="2"> </td> </tr> <tr> <td>Contact Person</td> <td colspan="2"> </td> </tr> <tr> <td>Telephone No. / Fax. No.</td> <td> </td> <td> </td> </tr> <tr> <td>E-mail</td> <td colspan="2"> </td> </tr> </table>	Legal Name	Wholly-Owned Affiliate of Developer		Address						Has this entity already been formed	No		Principals			Principals			Contact Person			Telephone No. / Fax. No.			E-mail		
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65 . <b>General Partner:</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Legal Name</td> <td colspan="2">n/a</td> </tr> <tr> <td>Address</td> <td colspan="2"> </td> </tr> <tr> <td> </td> <td colspan="2"> </td> </tr> <tr> <td>Has this entity already been formed</td> <td style="text-align: center;">No</td> <td> </td> </tr> <tr> <td>Principal (if corporate)</td> <td colspan="2"> </td> </tr> <tr> <td>Contact Person</td> <td colspan="2"> </td> </tr> <tr> <td>% of Ownership</td> <td colspan="2"> </td> </tr> <tr> <td>Telephone No. / Fax. No.</td> <td> </td> <td> </td> </tr> <tr> <td>E-mail</td> <td colspan="2"> </td> </tr> </table>	Legal Name	n/a		Address						Has this entity already been formed	No		Principal (if corporate)			Contact Person			% of Ownership			Telephone No. / Fax. No.			E-mail		
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Contact Person																												
% of Ownership																												
Telephone No. / Fax. No.																												
E-mail																												

Highland Yard

Application Date: 2/14/18

#VALUE!

**67 . Development Consultant:**

Legal Name	None	
Address		
Contact Person		
Telephone No. / Fax. No.		
E-mail		

**68 . Contractor:**

Name	NEI General Contracting	
Address	27 Pacella Park Drive Randolph, MA 02368	
Fed Tax ID #		
Contact Person	Mark Marcelli	
Telephone No. / Fax. No.	617-445-5100	
E-mail	mmarcelli@nelgc.com	

**69 . Architect:**

Name	Utile	
Address	115 Kingston Street Boston, MA 02111	
Contact Person	Matthew Little	
Telephone No. / Fax. No.	617-423-7200	
E-mail	mlittle@utiledesign.com	

**70 . Management Agent:**

Name	n/a	
Address		
Contact Person		
Telephone No. / Fax. No.		
E-mail		

**71 . Attorney (Real Estate):**

Name	Klein Hornig LLP	
Address	101 Arch Street, Suite 1101	
Contact Person	Joseph Lieber	
Telephone No. / Fax. No.	617-224-605	
E-mail	jlieber@kleinhorng.com	

**72 . Attorney (Tax):**

Name	n/a	
Address		
Contact Person		
Telephone No. / Fax. No.		
E-mail		

**73 . Syndicator:**

Name	n/a	
Address		
Contact Person		
Telephone No. / Fax. No.		
E-mail		

74. **Guarantor:**

Name	New Atlante Development LLC	
Address	236 Huntington Ave, Suite 314	
Contact Person	William Madsen Hardy	
Telephone No. / Fax. No.	617-335-8821	
E-mail	bill@newatlantic.net	

75. **Service Provider or Coordinator:**

Name	n/a	
Address		
Contact Person		
Telephone No. / Fax. No.		
E-mail		

76. **Marketing Agent:**

Name	TBD	
Address		
Contact Person		
Telephone No. / Fax. No.		
E-mail		

77. **Sustainability/LEED**

<i>Other role</i> Name	Advanced Building Analysis	
Address	2 Woodlawn Street Amesbury, MA 01913	
Contact Person	Mike Browne	
Telephone No. / Fax. No.	978-270-3911	
E-mail	mike@advancedbuildinganalysis.com	

78. **Environmental**

<i>Other role</i> Name	Cooperstown Environmental	
Address	23 Main Street Andover, MA 01810	
Contact Person	Jim Curtis	
Telephone No. / Fax. No.	978-470-4755	
E-mail	jim@cooperstownenv.com	

79. Is there any identity of interest between any members of the development team?

Yes

None

80. Please describe the relationship of the development entity to sponsoring organizations. Is the entity newly-formed or to-be-formed? Is it a single-purpose corporation? How will the parent corporation provide support to this entity? Include an organizational chart showing other affiliates of the parent corporation, as appropriate, and principals of each.

The applicant/sponsor, New Atlantic Development LLC will create a single-purpose, single-member LLC that will be controlled by New Atlantic Development LLC. The members/owners of New Atlantic, William Madsen Hardy and Brian Goldson, will be the only individuals with decision-making authority and onwership of the project.

## Section 3 SOURCES AND USES OF FUNDS

Sources of Funds							
<b>Private Equity:</b>				<i>Optional user calculations</i>			
81 . Sales Proceeds		\$6,918,000					
82 . Tax Credit Equity (net amount) <small>(see 360, Section 5, page 18.)</small>		\$75,000					
83 . Developer's Fee/Overhead, Contributed or Loaned		\$					
84 . Other Source: Energy Rebates		\$50,600					
<b>Public Equity:</b>							
85 . HOME Funds, as Grant		\$					
86 . Grant: DND IDP		\$1,450,000					
87 . Grant:		\$					
88 . <b>Total Public Equity</b>		\$1,450,000					
<b>Subordinate Debt (see definition):</b>							
	<i>Amount</i>	<i>Rate</i>	<i>Amortiz.</i>	<i>Term</i>			
89 . Home Funds-DHCD, as Subordinate Debt	\$0	%	yrs.	yrs.			
Source:							
90 . Home Funds-Local, as Subordinate Debt	\$0	%	yrs.	yrs.			
Source:							
91 . Subordinate Debt	\$0	%	yrs.	yrs.			
Source:							
92 . Subordinate Debt	\$0	%	yrs.	yrs.			
Source:							
93 . Subordinate Debt	\$0	%	yrs.	yrs.			
Source:							
94 . <b>Total Subordinate Debt</b>	\$0						
<b>Permanent Debt (Senior):</b>							
	<i>Amount</i>	<i>Rate</i>	<i>Override</i>	<i>Amortiz.</i>	<i>Term</i>	<i>MIP</i>	
95 . MHFA: MHFA Program 1	\$	%	%	yrs.	yrs.	%	
96 . MHFA: MHFA Program 2	\$	%	%	yrs.	yrs.	%	
97 . MHP Fund Permanent Loan	\$	%		yrs.	yrs.	%	
98 . Other Permanent Senior Mortgage	\$	%		yrs.	yrs.	%	
Source:							
99 . Other Permanent Senior Mortgage	\$	%		yrs.	yrs.	%	
Source:							
## . <b>Total Permanent Senior Debt</b>	\$0						
## . <b>Total Permanent Sources</b>	\$8,493,600						
<b>Construction Period Financing:</b>							
## . Construction Loan	\$6,226,200	6.50%	24.0				
Source:	Boston Community Capital						
Repaid at:	(event)						
## . Other Interim Loan	\$0	%	mos.				
Source:							
Repaid at:	(event)						
## . Syndication Bridge Loan	\$0	%	mos.				
Source:							
Repaid at:	(event)						

Highland Yard

Application Date: 2/14/18

#VALUE!

Uses of Funds		
<i>The Contractor certifies that, to the best of their knowledge, the construction estimates, and trade-item breakdown on this page are complete and accurate.</i>		
Direct Construction:	NEI General Contracting <i>Marcella</i>	
Who prepared the estimates?	Name	
Basis for estimates?	Marcella-Highland	
Trade Item	Residential	Total
Concrete	\$275,016	\$275,016
Masonry	\$0	\$0
Metals	\$39,594	\$39,594
Rough Carpentry	\$642,060	\$642,060
Waterproofing	\$0	\$0
Finish Carpentry	\$181,917	\$181,917
Insulation	\$107,010	\$107,010
Roofing	\$78,778	\$78,778
Sheet Metal and Flashing	\$0	\$0
Exterior Siding	\$299,628	\$299,628
Doors	\$85,608	\$85,608
Windows	\$64,206	\$64,206
Glass (Glass & Storefront)	\$0	\$0
Drywall Gypsum Board Systems	\$428,896	\$428,896
Tile Work	\$38,500	\$38,500
Acoustical	\$0	\$0
Wood Flooring	\$0	\$0
Resilient Flooring	\$143,417	\$143,417
Carpet	\$0	\$0
Paint & Decorating	\$85,608	\$85,608
Specialties	\$20,760	\$20,760
Cabinets	\$74,907	\$74,907
Special Equipment	\$85,608	\$85,608
Appliances	\$39,594	\$39,594
Blinds	\$7,200	\$7,200
Special Construction	\$1,500	\$1,500
Elevator or Conveying Systems	\$0	\$0
Plumbing & Hot Water	\$310,329	\$310,329
Heat & Ventilation	\$342,432	\$342,432
Air Conditioning		\$0
Fire Protection	\$76,833	\$76,833
Electrical	\$353,133	\$353,133
Other/Misc.		\$0
<b>Subtotal Structural</b>	<b>\$3,782,534</b>	<b>\$3,782,534</b>
Earth Work	\$349,628	\$349,628
Site Utilities	inc. above	inc. above
Roads & Walks		\$0
Site Improvements	\$49,225	\$49,225
Geotechnical Conditions		\$0
Landscaping	\$53,505	\$53,505
Environmental Remediation		\$0
Demolition		\$0
Unusual Site Conditions		\$0
<b>Subtotal Site Work</b>	<b>\$452,358</b>	<b>\$452,358</b>
<b>Total Improvements</b>	<b>\$4,234,892</b>	<b>\$4,234,892</b>
General Conditions	\$404,562	\$404,562
Payment and Performance Bond		\$0
Building Permits		\$0
<b>Subtotal</b>	<b>\$404,562</b>	<b>\$404,562</b>
Builder's Overhead	\$127,047	\$127,047
Builder's Profit/Fee	\$127,047	\$127,047
Contingency	\$105,872	\$105,872
<b>Total</b>	<b>\$4,999,420</b>	<b>\$4,999,420</b>
Total Cost/Square Feet		\$0

February 13, 2018

<b>Development Budget:</b>				
	<i>Total</i>	<i>Residential</i>	<i>Commercial</i>	<i>Comments</i>
## . Acquisition: Land	\$1,000	\$1,000		
## . Acquisition: Building	\$0	\$0		
## . <b>Acquisition Subtotal</b>	\$1,000	\$1,000	\$0	
## . Direct Construction Bu	\$0	\$5,501,766		const contract+remediation+pv>window guards
## . Construction Contingen	\$268,371	\$268,371		5.0% of construction +pv
## . <b>Subtotal: Constructio</b>	\$268,371	\$5,770,137	\$0	
<b>General Development Costs:</b>				
## . Architecture & Enginee	\$307,595	\$307,595		
## . Survey and Permits	\$73,674	\$73,674		
## . Clerk of the Works	\$80,000	\$80,000		
## . Environmental Enginee	\$45,000	\$45,000		
## . Bond Premium	\$53,674	\$53,674		
## . Legal	\$150,000	\$150,000		dev - \$125k DND \$25k
## . Title and Recording	\$50,000	\$50,000		
## . Accounting & Cost Cert	\$20,000	\$20,000		
## . Marketing and Rent Up	\$40,000	\$40,000		
## . Real Estate Taxes	\$17,500	\$17,500		
## . Insurance	\$70,000	\$70,000		
## . Relocation	\$0			
## . Appraisal	\$15,000	\$15,000		+ market study
## . Security	\$0			
## . Construction Loan Inter	\$320,827	\$320,827		
## . Inspecting Engineer	\$20,000	\$20,000		
## . Fees to: BCC	\$133,393	\$133,393		
## . Fees to: Broker	\$178,500	\$178,500		
## . Utility Back	\$25,000	\$25,000		
## . Const Testing	\$15,000	\$15,000		
## . Letter of Credit Fees	\$0			
## . Other Financing Fees	\$0			
## . Development Consultan	\$0			
## . Other: Carry Costs	\$64,800	\$64,800		
## . Other: LEED	\$40,000	\$40,000		
## . Soft Cost Contingency	\$67,500	\$67,500		3.9% of soft costs
## . <b>Subtotal: Gen. Dev.</b>	\$1,787,463	\$1,787,463	\$0	
## . <b>Subtotal: Acquis., Co</b>	\$2,056,834	\$7,558,600	\$0	
<b>and Gen. Dev.</b>				
## . Capitalized Reserves	\$0			
## . Developer Overhead	\$467,500	\$467,500		
## . Developer Fee	\$467,500	\$467,500		
## . <b>Total Development C</b>	\$2,991,834	\$8,493,600	\$0	<b>TDC per unit</b> \$166,213
## . <b>TDC, Net</b>	\$2,991,834	\$8,493,600	\$0	<b>TDC, Net per unit</b> \$166,213

## Section 7 SIGNATURE PAGE

Project Name

Date:     
*(month) (day) (year)*

*The applicant certifies that this application is complete and accurate, to the best of his/her knowledge, and that there are no material misrepresentations.*

Mortgagor:   


## 2.2.5 Financing Letter of Interest



February 1, 2018

William Madsen Hardy  
New Atlantic Development  
236 Huntington Ave  
Suite 314  
Boston, MA 02115

Re: Highland Street

Dear Bill,

Boston Community Loan Fund ("BCLF") is pleased to provide New Atlantic Development with a letter of interest and preliminary terms for a loan for new construction of a facility at 273 – 287 Highland Street, Boston. The following preliminary terms do not represent a commitment. The loan will need to be underwritten and approved prior to issuing a commitment. Final terms of the loan will be determined as BCLF completes its analysis; however, the following provides an initial indication of the financing available from BCLF/NFF.

**Charles Clark**  
Chair of the Board

**Elyse D Cherry**  
Chief Executive Officer  
Boston Community Capital

**DeWitt Jones**  
President  
BCC Solar Energy Advantage

**Michelle Volpe**  
President  
BCC Loan Fund

**Affiliates**  
Boston Community Loan Fund  
Boston Community Venture Fund  
Boston Community Managed Assets  
Solar Energy Advantage  
NSP Residential LLC  
Aura Mortgage Advisors LLC

<b>Borrower:</b>	New Atlantic Development LLC, or a wholly-owned single-purpose affiliate
<b>Amount:</b>	Up to \$6,000,000 Final Loan amount will be determined once construction estimates have been received.
<b>Interest Rate:</b>	estimated at 6.5%
<b>Maturity Date:</b>	twenty four months from close of construction
<b>Origination Fee:</b>	1.0% of Loan Amount

**Security:**

- First priority mortgage on the Premises;
- First priority assignment of leases and rents generated by the Premises, if any;
- First lien on all business assets; and
- Other collateral required by Lender.

10 Malcolm X Boulevard, Boston, MA 02119  
Direct 617-427-8600 Fax 617-427-9300  
[bostoncommunitycapital.org](http://bostoncommunitycapital.org)

At the intersection of  
downtown and community.

- Payment: a.) Interest only payments during the term of the loan;  
b.) The entire unpaid principal balance, plus any accrued, unpaid interest thereon, shall be due upon the Maturity Date; and  
c.) Voluntary payments can be made without premium or penalty
- Expenses: Borrower shall pay or reimburse Lender for all out-of-pocket costs incurred by Lenders, including, but not limited to, legal costs, appraisal, title insurance and recording charges, and search and filing fees. These costs are the obligation of the Borrower and are payable whether or not the financing is committed or closes.
- Financial Reporting: Annual CPA-prepared tax returns and financials and quarterly unaudited financial statements for Borrower
- Good Faith Deposit: In order to proceed with the underwriting, Borrower shall provide Lender with a deposit in the amount of \$3,000, which will be applied to the Origination Fee at closing. If Borrower elects not to close the financing, the deposit will be retained by Lender in full and considered earned income.

Additional affirmative and negative covenants usual and customary for transactions of this type may be required by Lender or its counsel, including but not limited to limitations on liens, investments, distributions, restricted payments, asset sales and dispositions.

Final terms and conditions of financing will be determined at a later date, subject to additional due diligence and BCLF credit approval. This letter is for discussion purposes only and does not constitute a commitment to lend. This term sheet will expire on May 1, 2018.

BCLF is excited to work with you on this project. If you have any questions, please do not hesitate to call me at 617-427-3608 or email me at [kmchugh@bostoncommunitycapital.org](mailto:kmchugh@bostoncommunitycapital.org).

Sincerely,



Kathryn McHugh  
Senior Loan Officer  
Boston Community Capital

## 2.2.6 Pre-Development Sources and Uses

### Predevelopment Sources and Uses

The following table contains the estimated predevelopment costs for the project which would be paid prior to the acquisition/construction closing. All costs will be funded by developer equity, unless we choose to seek a predevelopment loan for some portion of the total. Based on our financials (see section 2.2.7), our un-used line of credit of \$200,000 with Eastern Bank, and the assets of the LLC members, the full amount of the costs can easily be covered. Also, we have 2 development fee payments due in March and September of this year totaling another \$175,000. (Since New Atlantic Development LLC is a cash-based entity for tax and accounting purposes, so these do not show up as assets on our books.)

Highland Yard Predevelopment Sources and Uses	
<u>Sources</u>	
Predevelopment Loan	\$0
Developer Equity	\$233,000
Total	\$233,000
<u>Uses</u>	
A/E Design & Inspection	\$120,000
Sustainability Consulting/LEED Certification	\$25,000
Survey & Permits	\$8,000
Environmental Assessment	\$30,000
Appraisal/Market Study	\$15,000
Legal	\$25,000
Const Loan Fees	\$5,000
Soft Cost Contingency	\$5,000
Total	\$233,000

## 2.2.7 Developer Financials

**New Atlantic Development LLC  
New Atlantic Development Corporation  
Five Year Combined Balance Sheet Summary**

	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
<b>ASSETS:</b>					
Cash and Cash Equivalents	610,775	179,545	4,774	29,735	67,989
Accounts Receivable - Current	9,000	15,600	411,440	45,776	1,494,003
Long Term Development Fee Notes Receivable	980,838	966,127	649,351	720,000	372,052
Office FFE and Improvements	136,745	136,745	102,868	68,991	34,705
Real Estate and Capitalized RE Expenses	755,614	2,445,762	2,324,076	2,278,877	-
Other Investments	-	50,000	50,000	50,000	-
<b>Total Assets</b>	<u>2,492,972</u>	<u>3,793,779</u>	<u>3,542,508</u>	<u>3,193,379</u>	<u>1,968,749</u>
<b>LIABILITIES:</b>					
Payables and Payroll Liability	65,514	432	-	148	4,071
Short Term Liabilities	-	50,000	681,454	933,508	993,508
Long Term Liabilities	89,133	674,133	603,500	603,500	-
<b>Total Liabilities</b>	<u>154,647</u>	<u>724,565</u>	<u>1,284,954</u>	<u>1,537,156</u>	<u>997,579</u>
<b>Net Shareholder Equity &amp; Retained Earnings</b>	<b>2,338,325</b>	<b>3,069,214</b>	<b>2,257,554</b>	<b>1,656,223</b>	<b>971,170</b>
<b>Total Liability and Shareholder Equity</b>	<u>2,492,972</u>	<u>3,793,779</u>	<u>3,542,508</u>	<u>3,193,379</u>	<u>1,968,749</u>

**2018 YTD Profit & Loss**

<b>INCOME:</b>	
Consulting Fees	6,631
Development Fees	34,647
Management Fees	34,541
<b>Total Income</b>	<u>75,819</u>
<b>EXPENSE:</b>	
Bookkeeping	1,800
Insurance	288
Legal	397
Misc	37
Office Supplies	727
Rent	2,485
Utilities	322
<b>Total Expense</b>	<u>6,056</u>
<b>Net Income</b>	<b>69,763</b>

**2018 YTD Trial balance**

<b>ASSETS:</b>	
BPB Checking	113,506
Loan to SHI SP	2,000
Office FFE	3,738
Rent Deposit	3,360
Uphams Dev Fee Loan	468,758
Capitalized Real Estate Costs	520
LLC Purchase Price	3,024
UCMRLP Investment	12,968
Deposit to EQR	900,000
<b>Total Assets</b>	<u>1,507,874</u>
<b>LIABILITIES &amp; EQUITY:</b>	
Opening Balance Equity	485,086
WMH Member Equity	26,512
BG Member Equity	26,512
Net Income	69,764
Due to Shareholder	900,000
<b>Total Liabilities &amp; Equity</b>	<u>1,507,874</u>

## 2.3 Design

### 2.3.1 Design Narrative

#### Highland Yard Design Narrative

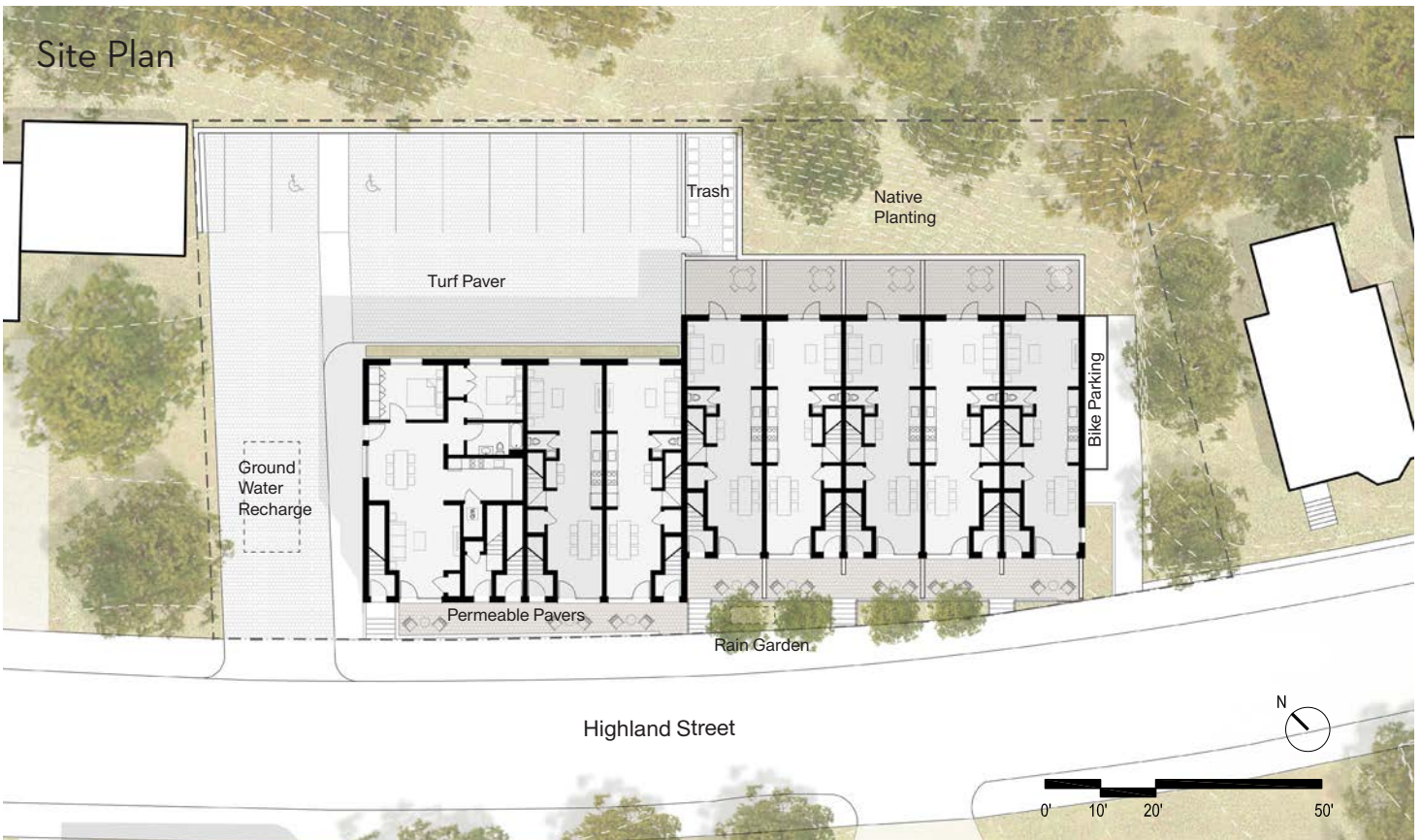
Highland Yard consists of 18 units designed to exceed the highest standards for energy conservation. The siting and design of the building at once takes advantage of the south facing slope for solar orientation as well as the opportunity to fill-in a large missing tooth in the residential fabric of Highland Street. The neighborhood consists of single, two-family, and smaller townhouses along with multifamily homes, and accordingly Highland Yard's multiple single entries on the street and rowhouse rhythm retain that character. Like a traditional townhouse, all units have front and rear exposures that not only enhance the sense of "home" ownership, but also enable natural cross-ventilation and equalize the thermal loads on the units.

While the building's formal presentation to the street is reminiscent of traditional forms of urbanism, the architectural character of the building is distinctly contemporary. The building's expression, fenestration, materials, and shading elements are designed to enhance the energy performance of the project and the thermal comfort of its occupants. The canopy at the entries and the extended cornice at the roofline not only provide seasonally-appropriate shading, but also support additional Photovoltaic panels. The size and proportions of the windows, as well as the expressed wall depth that surrounds them, marry the aesthetic and performative goals for the development.

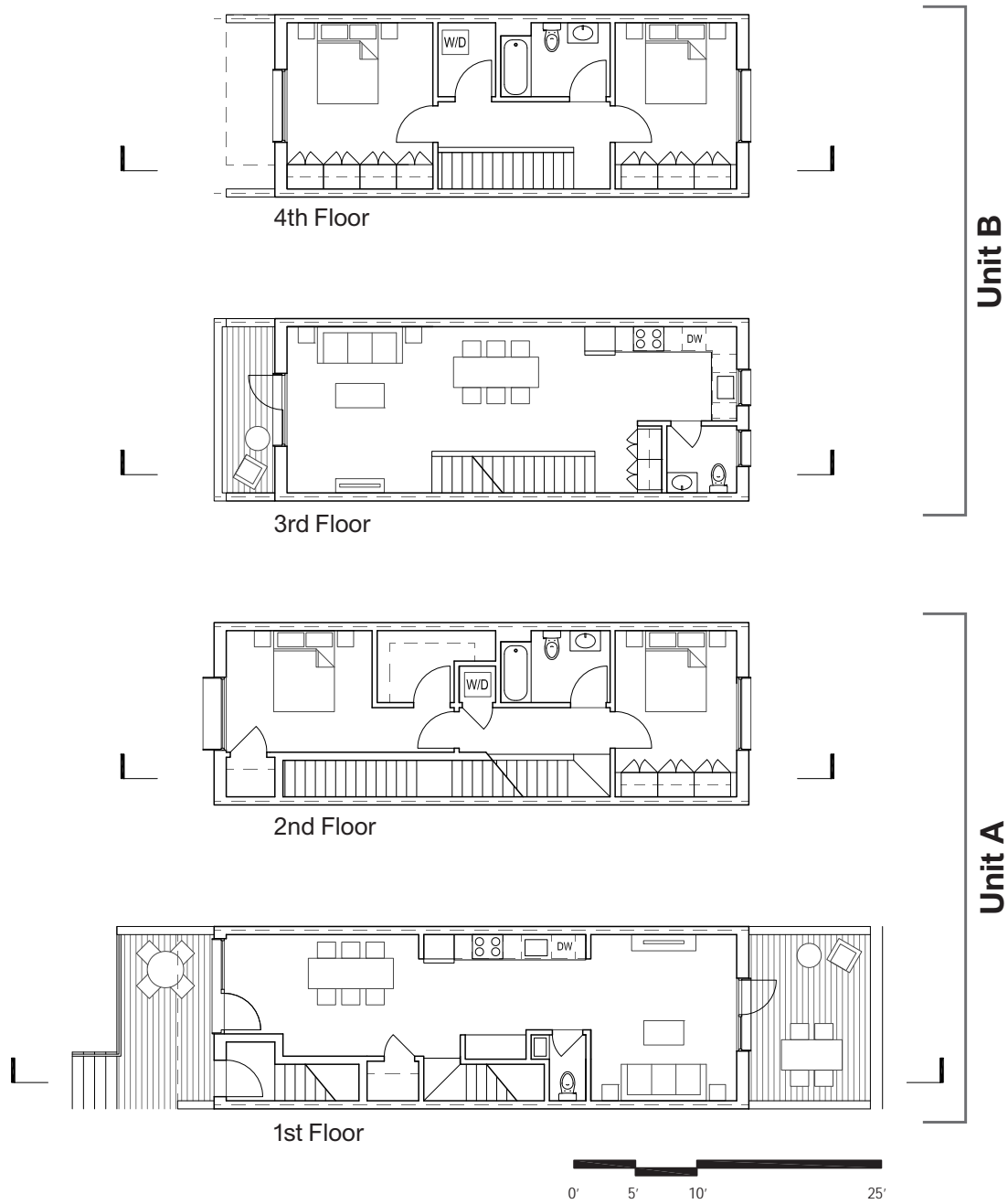
All units have their own entry on Highland Street. The entrances are connected by a shared and extended front "porch" that provides semi-private exterior space as well as alternative accessible entries to the units. Mediating between public and private, these spaces provide moments for residents to interact with each other and support seasonal activities like trick-or-treating and Porchfest. The remainder of the site provides different kinds of outdoor space, such as north facing rear patios for hot days and shady planted areas at the eastern corner of the rear yard.

The units are designed specifically to enhance the feeling of homeownership by creating a sense of internal independence, while being modest in size to achieve affordability and to minimize the use of energy and other resources. All units have two-bedrooms, which most flexibly serves a wide demographic from a family of five to a couple. In most cases, living rooms, dining rooms, and kitchens are arranged in a flexible open manner that can accommodate multiple furniture configurations.

### 2.3.2 DND Design Submission



## Typical Unit Plans



## Unit Count By Type

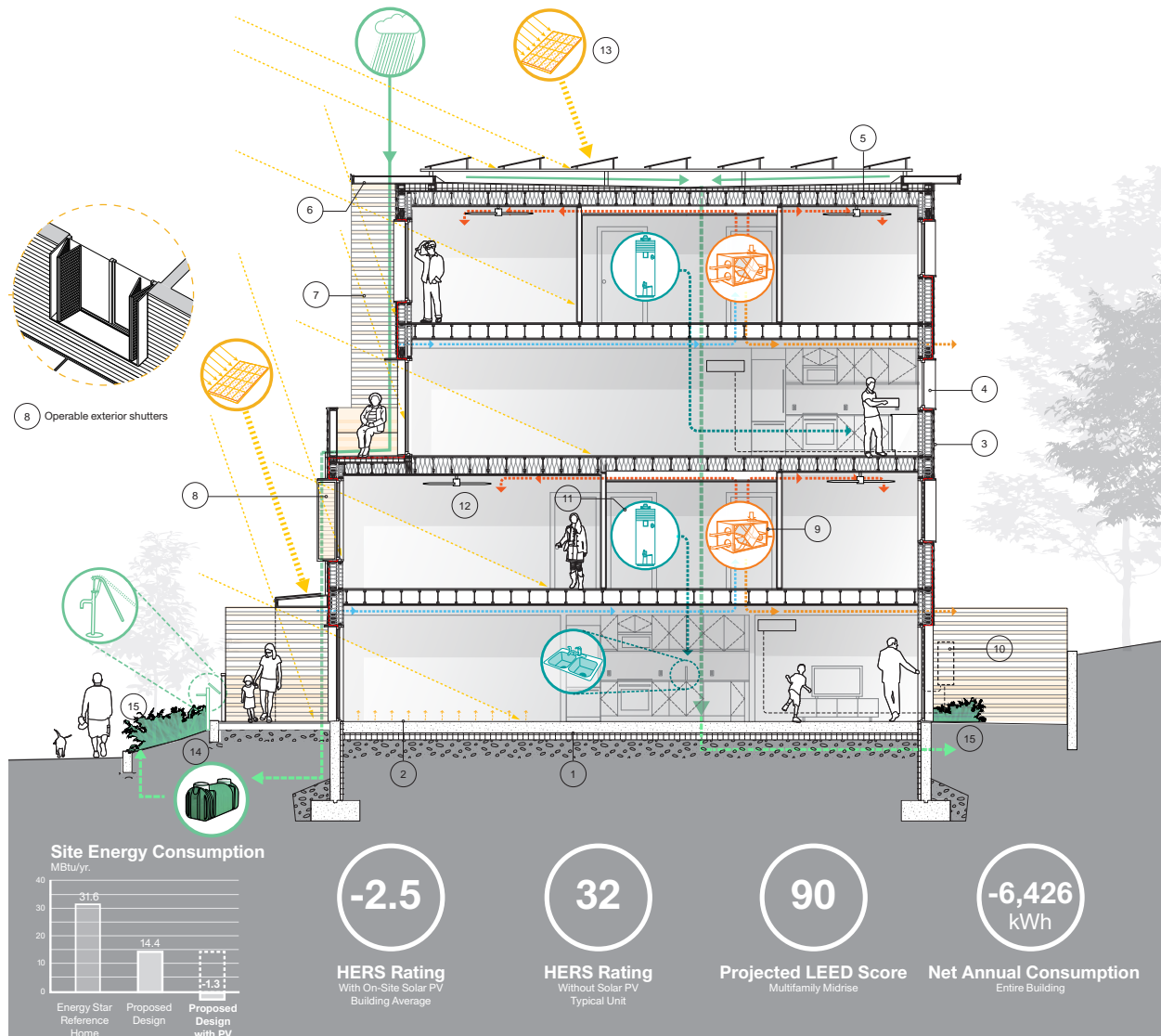
Floor	GSF	Units	Duplex A	Duplex B	Flat A (MAAB)	Flat B
			1005 NSF	1041 NSF	934 NSF	986 NSF
1	5,677	8	7	0	1	0
2	5,677	1	0	0	0	1
3	5,024	9	0	9	0	0
4	5,024	0	0	0	0	0
<b>TOTAL</b>	<b>21,402</b>	<b>18</b>	7	9	1	1

## 2.4 Sustainability

### 2.4.1 Sustainability Narrative

#### Sustainable Design Narrative

Highland Yard is designed to be durable, energy-efficient, and resource-conserving. The building addresses the specific needs of Boston’s climate: it keeps heat in and cold temperatures out, lets the sunlight in during the winter, and promotes cross-ventilation and good shading during the summer. However, to surpass the target of net zero energy, a climate-responsive design must take additional measures to optimize envelope performance, building systems efficiency, and renewable energy production. For this reason, the project has adopted the guidelines of the PHIUS+ 2015 Passive House standard. By designing to this standard, heating and cooling demands will be kept so low that space conditioning systems can be kept simple and small, and overall operational energy use will be minimal. As a result, the building will be able to produce more energy than it consumes after the integration of a renewable solar photovoltaic system.



## Passive Design

Orientation, air tightness, and super-insulation are three techniques the project employs to achieve Passive House performance. First, the building opens up to the south for full daylight and views, while integrated shading overhangs and screens ensure solar control during the summer and shoulder seasons. Second, a continuous air barrier ensures airtightness across all building assemblies, keeping out unwanted infiltration. Third, continuously-insulated walls, foundations, ceilings, and triple-glazed windows greatly minimize heat loss. The building's calculated heating design load is 2.6 BTU/h/sf, and the cooling design load is 4.2 BTU/h/sf—both meeting the climate-specific targets for Passive House.

## Simple, Efficient Systems

In addition to the building skin, the building's mechanical systems are designed to be highly efficient and easy to operate. Highland Yard utilizes energy recovery ventilators within each unit to achieve excellent indoor air quality and balanced ventilation within its airtight envelope. The apartments can each be conditioned by a single ductless mini-split located within the living area, with high-efficiency ceiling fans in the bedrooms to circulate air and provide additional comfort. Hot water is delivered by an energy-saving heat pump hot water system located in the mechanical closet. Lights and appliances are high-efficiency, Energy Star rated to reduce electrical loads. Lastly, a photovoltaic solar array mounted on the roof and entry canopy generate a surplus of electricity over the course of the year. Synthesizing these measures into an integrated design, Highland Yard achieves an average HERS score of -2.5.

## A Healthy Indoor Environment and Durable Structure

A primary area of consideration following the design of a tight and efficient envelope is healthy indoor air quality. This begins with source contamination control and balanced ventilation, and is underpinned by a durable structure that manages water and reduces mold risk. The aforementioned energy recovery ventilation system utilizes MERV 8 filters to treat outside air prior to distribution. Finishes will meet stringent standards to avoid any VOC content and harmful emissions, and other sources of air contamination have been minimized by eliminating combustion equipment from the home. In addition to these system and material considerations, construction protocol for the building will include a requirement for fully sealing and protecting the ventilation ductwork and mechanical systems in the building from dust and debris. An entry way walk-off mat and shoe removal/storage area will help reduce foot-borne air contaminants brought into the home during occupancy.

The design of Highland Yard closely considers durability as part of its healthy environment strategy. Roof and window overhangs protect walls from wetting, while a vented rainscreen cavity and smart vapor control layers allow assemblies to dry toward both the interior and exterior, enhancing the longevity of the structure and avoiding the risk of mold. Thermal bridges are virtually eliminated through careful envelope design, further minimizing heat loss and any condensation risk, while capillary breaks at foundation slabs and walls are used at all locations to prevent adverse effects of ground moisture intrusion. The combination of ventilation and moisture management measures will ensure healthy indoor air quality for all residents.

**Conserving Resources**

Of special note is the design’s strong focus on water conservation. Fixtures such as toilets, faucets, and showerheads have been selected to meet low flow requirements while staying affordable. In addition, the team has integrated an innovative system for collecting rainwater from the roofs of the home in an underground cistern where it is available to the homeowner for landscape/garden irrigation purposes via a manual hand pump. This is a simple and elegant example of stormwater reclamation/reuse system that is low profile and attractive and which does not increase the energy intensity of the project. In addition, all landscape areas are designed for stormwater control, and all paved areas are made of pervious material to reduce runoff. Rain gardens and landscape strips will feature drought tolerant plantings and ground covers, further minimizing potable water need.

The more global environmental and energy impacts of the construction of these homes will be greatly minimized through the use of efficient framing techniques, recycled materials, and construction waste diversion to recycling. Double stud walls utilize advanced framing techniques which save on wood resources. These walls along with the roof framing are filled with dense-pack cellulose insulation, a high recycled-content, high-performing and durable insulation material. This insulation reduces the need for foam in most places of the envelope, thus lowering the building’s global warming potential. The project is also committed to diverting at least 63% of the waste generated during construction from the landfill to recycling facilities.

**Implementation and Stewardship**

Designing a healthy, energy positive building is only the first step to the goal of green and sustainable housing. Of utmost importance is the commitment made to educating homeowners. We will develop a comprehensive and detailed O&M manual for residents that describes the project’s building systems and their required maintenance in understandable terms. The design team will also engage with the new owners via walkthroughs of their home to explain the components and features. We are excited to work with residents as they become key players in making Highland Yard a model for efficient and healthy dwelling.

**2.4.2 Energy Use and Source Summary**

**Annual Consumption per Dwelling Unit (kWh, all Electricity):**

Heating	107
Cooling	103
Domestic Hot Water	455
Lights, Appliances, and Plug Loads	4353

**Annual Production per Dwelling Unit (kWh):**

Solar Photovoltaic Array	4710
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**Net Annual Consumption per Dwelling Unit:** -357 kWh

**Net Annual Consumption (Entire Building):** -6,436 kWh

## 2.4.3 LEED Checklist



### LEED v4 for Building Design and Construction: Multifamily Midrise Project Checklist

Project Name: **Highland Yard**  
Date: **February 13, 2018**

Y	?	N			
2			Credit	Integrative Process	2
<b>13</b>	<b>0</b>	<b>0</b>	<b>Location and Transportation</b>		<b>15</b>
Y			Prereq	Floodplain Avoidance	Required
<b>PERFORMANCE PATH</b>					
			Credit	LEED for Neighborhood Development Location	15
<b>PRESCRIPTIVE PATH</b>					
8			Credit	Site Selection	8
1			Credit	Compact Development	3
2			Credit	Community Resources	2
2			Credit	Access to Transit	2
<b>0</b>	<b>5</b>	<b>2</b>	<b>Sustainable Sites</b>		<b>7</b>
Y			Prereq	Construction Activity Pollution Prevention	Required
Y			Prereq	No Invasive Plants	Required
1	1		Credit	Heat Island Reduction	2
2			Credit	Rainwater Management	3
1.5	0.5		Credit	Non-Toxic Pest Control	2
<b>10</b>	<b>0</b>	<b>0</b>	<b>Water Efficiency</b>		<b>12</b>
Y			Prereq	Water Metering	Required
<b>PERFORMANCE PATH</b>					
			Credit	Total Water Use	12
<b>PRESCRIPTIVE PATH</b>					
6			Credit	Indoor Water Use	6
4			Credit	Outdoor Water Use	4
<b>34</b>	<b>1</b>	<b>0</b>	<b>Energy and Atmosphere</b>		<b>37</b>
Y			Prereq	Minimum Energy Performance	Required
Y			Prereq	Energy Metering	Required
Y			Prereq	Education of the Homeowner, Tenant or Building Manager	Required
30			Credit	Annual Energy Use	30
4			Credit	Efficient Hot Water Distribution	5
0	1		Credit	Advanced Utility Tracking	2
<b>8</b>	<b>0</b>	<b>0</b>	<b>Materials and Resources</b>		<b>9</b>
Y			Prereq	Certified Tropical Wood	Required
Y			Prereq	Durability Management	Required
1			Credit	Durability Management Verification	1
4			Credit	Environmentally Preferable Products	5
3			Credit	Construction Waste Management	3

17			1	0	<b>Indoor Environmental Quality</b>	<b>18</b>
Y				Prereq	Ventilation	Required
Y				Prereq	Combustion Venting	Required
Y				Prereq	Garage Pollutant Protection	Required
Y				Prereq	Radon-Resistant Construction	Required
Y				Prereq	Air Filtering	Required
Y				Prereq	Environmental Tobacco Smoke	Required
Y				Prereq	Compartmentalization	Required
3				Credit	Enhanced Ventilation	3
2				Credit	Contaminant Control	2
3				Credit	Balancing of Heating and Cooling Distribution Systems	3
3				Credit	Enhanced Compartmentalization	3
2				Credit	Enhanced Combustion Venting	2
1				Credit	Enhanced Garage Pollutant Protection	1
3				Credit	Low Emitting Products	3
	1			Credit	No Environmental Tobacco Smoke	1
2			0	0	<b>Innovation</b>	<b>6</b>
Y				Prereq	Preliminary Rating	Required
1				Credit	Innovation	5
1				Credit	LEED AP Homes	1
4			0	0	<b>Regional Priority</b>	<b>4</b>
1				Credit	Regional Priority: Specific Credit	1
1				Credit	Regional Priority: Specific Credit	1
1				Credit	Regional Priority: Specific Credit	1
1				Credit	Regional Priority: Specific Credit	1
90			7	2	<b>TOTALS</b>	<b>Possible Points: 110</b>

**Certified:** 40 to 49 points, **Silver:** 50 to 59 points, **Gold:** 60 to 79 points, **Platinum:** 80 to 110

#### 2.4.4 HERS Index

Please see Appendix A, submitted under separate cover, for HERS Projected Reports for Unit Types.

# PART 3: DEVELOPER QUALIFICATIONS, EXPERIENCE, AND REFERENCES

## 3.1 Developer Qualifications

**New Atlantic Development** is a Boston-based real estate development firm with 25 years of experience in creating and preserving vibrant and diverse communities.

Our special expertise lies in working openly with all project stakeholders to make the best possible outcome of every opportunity.

We call it **maximizing mission**.

We have an accomplished track record in the following areas of urban development:

**Housing:** market, mixed-income, affordable, elderly, special needs, rental and for-sale.

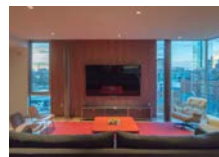
**Mixed-Use:** incorporating residential, retail, commercial, community space, live/work.

**Historic Preservation and Adaptive Re-Use.**

**Arts and Cultural:** artist studios, live/work, maker space, performance and exhibition space.

Our projects merge very high standards for design excellence, sustainability and financial creativity with strong community and cultural values rarely seen in the context of for-profit real estate development.

We believe that each project is stronger and more successful if it emerges from a well-informed and collaborative effort to shape change for the common good.



## William Madsen Hardy

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 Boston, MA 02115  
 617.335.8821  
 bill@newatlantic.net



### Education

B.A. Political Science  
 University of Michigan 1992

Master of Urban Planning  
 University of Michigan 1995

### Work History

Zachary & Associates  
 Detroit, MI 1995–1998

Homeowners' Rehab, Inc  
 Cambridge, MA 1998–2000

New Atlantic Development  
 Boston, MA 2000–present

### Boards & Affiliations

Vice Chair  
 Town of Brookline  
 Housing Advisory Board

President and Treasurer  
 Midway Artist Collective, Inc

President and Treasurer  
 WBL Artist Collective, Inc

Notary Public in Massachusetts

### Select Projects

Ferry Street Inn, Detroit  
 Garfield Building, Detroit  
 Edmonds-Carr Townhomes, Detroit  
 808 Memorial Drive, Cambridge  
 Bedrick Properties, Cambridge  
 Auburn Court II, Cambridge  
 Uphams Corner Market, Boston  
 Ruggles Assisted Living, Boston  
 Hibernian Hall, Boston  
 Columbia West Apartments, Boston  
 Drayton Homes, Boston  
 ElmBrook Homes, Concord  
 ArtBlock, Boston  
 Bates Art Center, Boston  
 Brookside Artist Live/Work, Boston  
 Centre-Creighton Apartments, Boston  
 Creighton Commons, Boston  
 35 Creighton, Boston  
 Olmsted Hill, Brookline  
 320 Lake Ave, Newton  
 Midway Studios, Boston  
 Girard - 600 Harrison, Boston  
 14 E Street, South Portland  
 1090 Walnut Ave, Newton

William Madsen Hardy has been working in the real estate industry for over 20 years. After receiving his master's degree from the University of Michigan's College of Architecture and Urban Planning in 1995, William went to work for a development consulting company in Detroit. In addition to acting as project manager on several developments, he provided consulting services for municipalities and other developers. These services included financing applications, tax credit syndication modelling, market studies and economic impact assessments. William was also a regular guest lecturer and graduate student mentor at the University of Michigan.

After moving to Massachusetts, William worked in Cambridge for a nonprofit community development corporation. In less than 3 years, he managed the development of 450 units of affordable housing.

In 2000, William joined New Atlantic Development as a Senior Project Manager, later becoming its Chief Operating Officer, and finally an Owner of the company. He has been responsible for managing all aspects of the development of new projects, acting as asset manager for existing projects, and for the day to day management of the company, including overseeing all accounting, the hiring and management of employees and regulatory compliance.

While at NAD, he has managed several real estate development projects, including:

- affordable rental and for-sale housing
- market rate rental and for-sale housing
- mixed-income/mixed use developments
- special needs housing
- assisted living
- retail space
- office space
- artist commercial studios
- artist live/work studios

William's expertise is in development finance, with a particular emphasis on tax credit programs, tax exempt bonds and local, state and federal subsidy programs. He is also very experienced with the fields of accounting, real estate and land use law, zoning, environmental regulations, fair housing, marketing, asset management and property management.

## Brian Thomas Goldson

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 Boston, MA 02115  
 617.872.0958  
 brian@newatlantic.net



### Education

B.Arch.  
 Roger Williams University 1995

### Work History

Newport Collaborative Architects  
 Newport, RI 1996–1998

CTS Consulting  
 Boston, MA 1998–1999

ICON Architecture  
 Boston, MA 1999–2005

New Atlantic Development  
 Boston, MA 2005–present

### Boards & Affiliations

Co-Chair (former)  
 Roslindale Village Main Street Design  
 Committee

Member (former)  
 Theodore Parker Church Property  
 Committee

Member  
 WBL Artist Collective, Inc

### Select Projects

North End Master Plan, Newport  
 Start of the Sea, Newport  
 Goodwin Street, Newport  
 Hotel Dartmouth, Boston  
 Quinipiac Terrace, New Haven  
 West Broadway BHA, Boston  
 Uphams Corner Market, Boston  
 Hibernian Hall, Boston  
 Drayton Homes, Boston  
 ArtBlock, Boston  
 Bates Art Center, Boston  
 Brookside Artist Live/Work, Boston  
 510 Hyde Park Ave  
 Blessed Sacrament Campus, Boston  
 Centre-Creighton Apartments, Boston  
 Creighton Commons, Boston  
 35 Creighton, Boston  
 Olmsted Hill, Brookline  
 320 Lake Ave, Newton  
 Midway Studios, Boston  
 Girard - 600 Harrison, Boston  
 14 E Street, South Portland  
 1090 Walnut Ave, Newton

For over 20 years Brian has worked in the fields of design, construction, and development. After receiving a Bachelor of Architecture from Roger Williams University, Brian worked for a variety of architecture firms in Rhode Island and Massachusetts, working on projects at various scales of design from small homes to the development of large-scale master plans in Newport, RI and Durham NC. While working in architecture, Brian focused on affordable housing and historic preservation including many historic tax credit projects, creating more than 400 affordable housing units.

In 2005, after close to a decade working in design, he joined New Atlantic Development as Director of Construction. In this role Brian was responsible for overseeing projects from inception through occupancy including the development of design concepts, managing the creation of construction documents, permitting, bidding, contractor selection, scheduling, construction oversight, neighborhood liaison, project closeout, occupancy, owner/tenant training, and property management. He has been responsible to oversee construction on projects ranging from modest tenant fit-outs to a \$60M new construction project.

A highlight of his career has been overseeing the construction of the Girard at 600 Harrison Avenue in Boston’s South End. This project, which won a Boston Society of Architect’s 2017 Design Excellence award, created 160 rental apartments and restaurant space with two levels of underground parking, utilizing a unique load-bearing Infinity wall system.

Brian’s expertise is in design and construction, with a focus on developing efficient, buildable, cost effective design strategies that benefit the building occupants while strengthening and enhancing the larger community. Key to accomplishing these goals in any project is fostering communication among all team members ensuring that project goals are met. Brian’s varied experience and background in design and construction allow him to bring together the various trades and to ensure projects are completed on time, on budget, and to the highest quality.

## SELECT PROJECT EXPERIENCE

### ArtBlock



The ArtBlock project resulted from the first disposition of publicly owned land in Mayor Menino’s Artist Space Initiative, an effort whose mission was to preserve the ability of individual artists to remain in the city despite skyrocketing real estate values. Developed in response to an RFP by the Boston Redevelopment Authority on land taken by the Authority decades ago under the federal Urban Renewal program, the \$27 million mixed-use project included the construction of two new five-story buildings framing the historic former Joshua Bates School on a full residential block in the Blackstone Franklin section of Boston’s historic South End neighborhood. The new construction program included a mix of 31 market rate townhomes and lofts, 23 permanently affordable artist live/work lofts, a new exhibition gallery, and enclosed below-grade parking. The former Joshua Bates School was renovated and upgraded for use as artist work-only studios, now known as the Joshua Bates Art Center, and was implemented under a unique non-profit-controlled structure designed by New Atlantic to include artist-tenant representation in governance, and to ensure that rents will remain deeply affordable in perpetuity. ArtBlock was funded by the BRA, the City’s Department of Neighborhood Development, syndication of Historic Tax Credits on the Bates Arts Center, and construction loans from Wainwright Bank, the Property Casualty Initiative, and Bank of America.

**Sources of Funds**

Historic Tax Credits	\$203,779
Boston Redevelopment Authority Loan	\$1,396,720
Boston Redevelopment Authority Grant	\$500,000
Developer Equity	\$191,742
Developer Fee Note	\$813,052
Property Casualty Initiative Loan	\$2,600,000
Construction Loan	\$18,732,840
City of Boston - DND	\$1,000,000
<b>Total Sources of Funds</b>	<b>\$25,438,133</b>



**Uses of Funds**

Acquisition	\$1,396,720
Construction	\$20,060,260
General Development Costs	\$3,180,221
Developer Overhead & Profit	\$800,932
<b>Total Uses of Funds</b>	<b>\$25,438,133</b>



## SELECT PROJECT EXPERIENCE

### Blessed Sacrament Campus Redevelopment



New Atlantic was selected by the non-profit Jamaica Plain Neighborhood Development Corporation as its real estate partner to redevelop a key site in the rapidly gentrifying Hyde Square section of Boston's unique Jamaica Plain neighborhood. The mission of the project was to maximize community value with the reuse of this historic site.

The site included 5 existing buildings located on just over 3 acres of land formerly owned by the Roman Catholic Archdiocese of Boston. The resulting \$35 million, two-phase project was recognized for excellence in sustainable community development by the Home Depot Foundation, and included the following components:

- A green centerpiece for the campus consisting of over an acre of green space designed to serve the surrounding community as well as new residents and other users of campus;
- A new mixed-use anchor for the campus including 6,500 sf of ground floor retail, 36-units of affordable rental housing, structured below-grade parking, and a 14kW photoelectric power system constructed to LEED Gold standards. Funding sources included Low Income Housing Tax Credits, New Markets Tax Credits, federal HOME Funds and an impressive array of other local and state subsidies.
- An affordable condominium component constructed to LEED Gold standards, including 10 homes in a new building and 6 in the renovated former historic rectory (which had to be moved within the site) both situated over a below-grade parking structure. All condominium units benefit from a uniquely distributed photoelectric power system on the roof of the new building. Federal Home funds and several local and state subsidy sources were used.
- Adaptive-reuse of the former historic convent as permanent, service-enriched housing for 28 formerly homeless individuals. Federal Home funds and several local and state subsidy sources were used.
- Sale of a former school for re-use by another developer for market rate rental housing.
- Sale of a former school and the former church structure to a separate non-profit for re-use as community, non-profit education and cultural uses.

**Sources of Funds**

Boston Community Capital Loan	\$10,299,697
BCC Partial Loan Repayment	(\$10,388,211)
NMTC Equity Loan & equity	\$3,883,000
MassHousing Partnership Perm Loan	\$1,900,000
Wainwright Bank Construction Loan	\$3,557,943
Repay Construction Loan	(\$3,557,943)
LIHTC Equity	\$10,982,510
Net Condo Sales	\$2,813,310
City of Boston - DND	\$2,309,601
City of Boston - OBD	\$200,000
Neighborhood Housing Trust	\$1,781,799
MA HOME Funds	\$2,531,799
MA Housing Innovation Fund	\$750,000
MA Affordable Housing Trust	\$1,848,000
MA Transportation Oriented Design Fund	\$750,000
MA Community Based Housing Fund	\$688,000
Deferred Developer Fee	\$556,035
DND GAHP	\$200,000
Charlesbank Homes Grant	\$35,000
Liberty Mutual Grant	\$70,000
<b>Total Sources of Funds</b>	<b>\$31,210,540</b>

**Uses of Funds**

Acquisition	\$5,136,784
Construction	\$17,379,234
General Development Costs	\$6,364,522
Developer Overhead & Profit	\$2,330,000
<b>Total Uses of Funds</b>	<b>\$31,210,540</b>



Blessed Sacrament Illustrative Landscape Plan (Revised Sept 30 2008)

## SELECT PROJECT EXPERIENCE

### Girard



New Atlantic recently completed this exciting new 193,000 square foot mixed-use residential project in the SOWA arts district of Boston’s vibrant South End neighborhood, with a primary mission to provide an on-going revenue stream to support the programs and facilities of the adjacent Cathedral of the Holy Cross, the largest religious structure in New England and the re-emerging heart of the Catholic Church in the Boston metropolitan area.

Developed in response to a five year conversation with Parish leadership and the Archdiocese on a former surface parking lot owned by the Cathedral parish, 600 Harrison consists of a highly contemporary 7-story mixed-use structure including 160 market rate and affordable apartments and state of the art residential amenities, ground floor retail and two levels of underground parking. The building was constructed to LEED Silver standards and incorporated an innovative structural system to reduce cost and promote better acoustic separation between apartments. Public and common areas feature finishes, fixtures and furnishings inspired by modern designers such as Eames, Jacobsen, Nelson, Saarinen, Girard and others. Ground floor retail space and adjacent outdoor terrace areas will include neighborhood uses including a restaurant.

The total project cost of approximately \$71 million was funded by construction loans from Eastern and Needham Banks, funds from the sale of Massachusetts Brownfields Tax Credits, and equity from New Atlantic and a closed-end real estate fund managed by JP Morgan Investment Management.



**Sources of Funds**

Eastern Bank Construction Loan	\$46,795,957
Investor Equity	\$20,790,357
Developer Equity	\$2,310,040
Brownfields Tax Credit Equity	\$770,000
<b>Total Sources of Funds</b>	<b>\$70,666,354</b>

**Uses of Funds**

Acquisition	\$75,000
Construction	\$60,682,520
General Development Costs	\$6,833,165
Developer Overhead & Profit	\$3,075,669
<b>Total Uses of Funds</b>	<b>\$70,666,354</b>





## REFERENCES

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## 3.2 Development Team

# Team Directory

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Sustainability/LEED	Advanced Building Analysis (WBE) 2 Woodlawn Street Amesbury, MA 01913 Mike Browne - <a href="mailto:mike@advancedbuildinganalysis.com">mike@advancedbuildinganalysis.com</a> - 978.270.3911
General Contractor	NEI General Contracting 27 Pacella Park Drive Randolph, MA 02368 Marc Marcelli - <a href="mailto:mmarcelli@neigc.com">mmarcelli@neigc.com</a> - 617.445.5100
Attorney	Klein Hornig LLP 101 Arch Street, Suite 1101 Boston, MA 02110 Joseph Lieber - <a href="mailto:jlieber@kleinhornig.com">jlieber@kleinhornig.com</a> - 617.224.0605
Licensed Site Professional	Cooperstown Environmental (WBE) 23 Main Street Andover, MA 01810 Jim Curtis - <a href="mailto:jim@cooperstownenv.com">jim@cooperstownenv.com</a> - 978.470.4755
Surveyor/Civil	Samiotes Consultants (WBE) 20 A Street Framingham, MA 01701 Steve Garvin - <a href="mailto:sgarvin@samiotes.com">sgarvin@samiotes.com</a> - 508.877.6688
Landscape Architect	Offshoots, Inc. 547 Rutherford Avenue Charlestown, MA 02129 Kate Kennen - <a href="mailto:kate@offshootsinc.com">kate@offshootsinc.com</a> - 617.500.6530
Structural Engineer	RSE Associates Inc 63 Pleasant Street, Suite 300 Watertown, MA 02472 Jennifer McClain - <a href="mailto:jmccclain@rseassociates.com">jmccclain@rseassociates.com</a> - 617.926-9300
MEP Engineer	BLW Engineers, Inc. 311 Great Road PO Box 1551 Littleton, MA 01460 Kenneth Beck - <a href="mailto:kbeck@blwengineers.com">kbeck@blwengineers.com</a> - 978-486-4301

# About Utile

utile

Utile is a Boston-based design firm built like a think tank. We thrive on solving complex problems in intelligent and pragmatic ways. From theoretical issues that frame policy to the practical implementation of architectural commissions, Utile develops a rigorous research-based approach for finding the best solutions.



### Design Process

The firm’s work is not driven by aesthetics, but by a shared interest in doing deep-dive research focused on the cultural, social, regulatory, and environmental issues inherent in a given design problem. Utile finds opportunities for design by uncovering these issues and synthesizing them.

As a result, Utile doesn’t focus on a particular project type, but rather projects that require comprehensive research and collaborative engagement with their clients. This means that the firm works on diverse projects of varying scales.

Utile has charted a new practice model that combines the innovative thinking of a design practice with the proactive strategic insights of business consultants. As the design process unfolds, the firm uncovers hidden correspondences and tests potential conceptual approaches through sophisticated information graphics, maps, and drawings.

### Design Expression

The expression of Utile’s projects results from considering the visual and functional role of building components—the roof, exterior cladding, windows, and doors. The firm champions the idea of the “multifunctioning element” and avoids adding ornamentation to create purely visual effects. The joints, drip edges, frames, and other details necessitated by well-informed construction practices are leveraged for maximum effect in an overall expressive approach. This larger composition carefully considers the scale and materials of neighboring buildings and finds the appropriate expression given the purpose of the project. The firm distinguishes between the role of background buildings and civic buildings—even in its own design proposals. Utile frames their projects within the continuum of a constantly evolving urban fabric and sees the thoughtful evolution of the city—more than the design of eye-catching one-off proposals—as the firm’s primary focus.

#### Name and Address

Utile, Inc.  
115 Kingston Street  
Boston, MA 02111  
Date Established  
2002

#### Company Type

Corporation

#### Management Team

Tim Love, Principal and President  
Michael LeBlanc, Treasurer and Principal  
Matthew Littell, Secretary and Principal  
Mimi Love, Principal

#### Employees

52 total (18 licensed architects, 46 professional design staff, 4 admin, 2 interns)

#### Major Areas of Focus

Urban design, urban planning, architecture

## utile

### Matthew Littell LEED AP Principal-in-Charge

Matthew Littell is one of the founding Principals of Utile. Through his work in the firm's architecture, planning, and early phase development projects, he has gained an expertise in building and zoning codes and the regulatory process specifically as they relate to urban design and housing.

Matthew specializes in multifamily housing, particularly affordable and middle income housing. He recently completed 51 affordable condominiums at 88 Hudson Street in Chinatown, and 35 affordable apartments at the mixed-use Upper Washington Street Housing in Dorchester. Under his direction, Utile currently has over 150 subsidized units in design or under construction throughout the metro region for various Community Development Corporations such as Urban Edge, The Neighborhood Developers, VietAID, and Asian CDC. Matthew has provided strategic planning and urban design services involving public housing properties throughout New England, including Boston, Portland, Holyoke, and Providence.

Matthew teaches in the architecture program at Northeastern University, where he leads a graduate-level research studio on urban architectural typologies. Matthew earned his M.Arch. from Harvard's Graduate School of Design in 1997, where he received the Boston Society of Architects' James Templeton Kelly award for the best final design project, as well as the Clifford Wong prize for outstanding design in housing.



**Education**

Harvard University Graduate School,  
Master of Architecture, 1997

Columbia College, Bachelor of Arts in  
Religion, 1989

**Affiliations**

Northeastern University Department  
of Architecture, Lecturer in Computer  
Aided Design, Graduate Thesis Studio

**Selected Projects**

88 Hudson Street Condominiums,  
Boston, MA—51 units of affordable  
housing for Asian CDC

Upper Washington, Dorchester, MA—  
Mixed-Use development for VietAID

One Beach, Revere, MA—39 units  
of affordable senior housing for The  
Neighborhood Developers

242 Spencer Avenue, Chelsea, MA—34  
units of affordable housing for The  
Neighborhood Developers

Spencer Green, Chelsea, MA—48  
units of affordable housing for The  
Neighborhood Developers

Bowdoin Street Mixed-Use, Boston,  
MA—41-unit affordable housing and  
retail development for VietAID

MetroMark Apartments, Boston,  
MA—for The Brennan Group and  
John M. Corcoran Company

Mildred C. Hailey Apartments (for-  
merly Bromley-Heath), Jamaica Plain,  
Boston, MA—for the Boston Housing  
Authority

Whittier Transformation Plan, Boston,  
MA—for TACC and the Boston  
Housing Authority

Archdale Public Housing  
Redevelopment—for Related Beal

Lower Roxbury Housing Analysis,  
Roxbury, MA—for The American City  
Coalition (TACC)

Portland Housing Authority Master  
Planning, Portland, ME

Chelsea Soldiers' Home Campus  
Redevelopment Master Plan, Chelsea,  
MA

Imagine Boston 2030, Boston, MA—  
The City of Boston's first citywide  
master plan in 50 years

Hyde-Blakemore, Roslindale, MA—13  
units of affordable housing for Urban  
Edge

Lyman Terrace Redevelopment  
Studies, Holyoke, MA—for  
MassDevelopment

Manton Heights Choice  
Neighborhoods Application,  
Providence, RI—for The American  
City Coalition (TACC)

Aqaba North Project Master Plan,  
Aqaba, Jordan

The Mastlight at Union Point, South  
Weymouth, MA—265-unit mixed-use  
development

Al Maryah Island—Architectural  
design controls and urban design re-  
finement for the new central business  
district in Abu Dhabi (in collaboration  
with over,under)

Downtown Boston Waterfront  
Planning Initiative—public realm  
plan, new zoning, and municipal har-  
bor plan for the City of Boston

Greenway District Planning Study,  
Boston, MA—for the City of Boston

Stuart Street Planning Study, Boston,  
MA

Long Beach Corridor Vision Plan,  
CA—in collaboration with RSAUD

East Anaheim Street Corridor Study,  
Long Beach, CA—in collaboration  
with RSAUD

## utile

Michael LeBlanc AIA  
Consulting Principal

Michael is a principal at Utile, where he has been in charge of numerous residential, institutional, and renovation projects such as the 160-unit mixed-use Girard at 600 Harrison Avenue in Boston's South End, the 31-unit mixed-use 26 West Broadway in South Boston, and the zero-carbon footprint, LEED Platinum certified E+ Housing Development in Jamaica Plain. His interests range from the logics of construction and material research, to investigating the parametric relationships between code, cost, sustainability, and experiential qualities in building design.

Prior to Utile, Michael worked at Machado Silvetti where he was a senior designer and project director on projects such as the Arizona State University Hassayampa Academic Village; the Honan-Allston Branch of the Boston Public Library, which won a 2003 AIA National Design Award; the Getty Villa, Research Center, and Scholars' Library; and the Provincetown Art Association Museum, which was the first LEED-certified art museum in the United States.

Additionally, Michael has taught design studios as a Faculty Associate at Arizona State University and is currently a member of the adjunct faculty at Northeastern University's Department of Architecture. He is also on the Board of Directors for the Boston Preservation Alliance.



**Education**

Arizona State University, Master of Architecture, 1997

University of Massachusetts, Bachelor of Fine Arts, Architectural Studies, 1991

**Affiliations**

American Institute of Architects

Boston Preservation Alliance (Board of Directors)

Northeastern University, Department of Architecture, Lecturer, Adjunct faculty, 2001-present

Arizona State University, Department of Architecture, Adjunct faculty, 1997-1998

**Selected Projects**

E+ Housing, Boston, MA—Two zero energy townhouses in Jamaica Plain

26 West Broadway, South Boston, MA—31-unit multifamily building with ground floor retail

380 Harrison Avenue, Boston, MA—14-story, 356,500 SF mixed-use building

Girard, Boston, MA—160-unit mixed-use development with ground floor retail

Front Street Development Design, Portland, ME—85-unit affordable housing redevelopment for the Portland Housing Authority

Inman Square Cambridge Street, Cambridge, MA—18-unit mixed-use development for Boston Night Life Ventures

Webster Block, Chelsea, MA—Three new buildings housing 141 units of multifamily units including lofts, flats, and townhouses

375 Broadway, Chelsea, MA—Residential conversion

7 East Springfield Street Condominiums, Boston, MA—Nine unit building in the South End

Residences at 557-559 East Second Street, South Boston, MA

345 Harvard Street Façade Renovations—Renovation of 27,000 SF 1960s housing

Boston City Hall and Plaza Master Plan, Boston, MA

Jamaica Plain Branch of the Boston Public Library, Boston, MA—3,000 SF addition and renovations to existing 8,000 SF 1909 historic building

Dudley Branch of the Boston Public Library Renovation, Boston, MA

Mattahunt Elementary School Façade Upgrades, Boston, MA—Complete façade removal, redesign and replacement

Hassayampa Academic Village, Arizona State University—625,000 SF new construction academic village (while with Machado Silvetti)

Tufts University UPC Connector Building Feasibility Study, Somerville, MA—25,000 SF new construction and 4,000 SF academic building renovation

Virginia Commonwealth University School of Art and Design, Qatar Foundation

Honan-Allston Branch of the Boston Public Library—New construction of a 20,000 SF branch library (while with Machado Silvetti)

Provincetown Art Museum, Provincetown, MA—Renovation and additions (while with Machado Silvetti)

## utile

Jeff Geisinger AIA, LEED AP  
Project Manager, Sustainable Design

Jeff Geisinger is an architect committed to climate-responsive design, particularly the integration of energy and daylight modeling in the design process. He most recently helped lead the Utile team win the first place prize in the domestiCITY for an affordable Atlanta competition, which tasked participants to develop innovative concepts promoting new design and construction options for affordable and sustainable housing. Jeff recently completed

Prior to joining Utile, Jeff worked for Ennead Architects in New York and Guillermo Vazquez Consuegra in Seville, Spain. He holds a B.Arch from Rice University and a Master of Science from the Building Technology Program at MIT. Jeff is a lecturer at Rhode Island School of Design, where he teaches courses on environmental building performance.



### Education

MIT, Master of Science in Building Technology

Rice University, Bachelor of Architecture

Certified Passive House Consultant Training (January 2018)

### Selected Projects

Atlanta Affordable Housing

NeighborWorks Brockton

Dudley Library

Harvard William James Hall

Aqaba



**Education**

Northeastern University, Master of Architecture

Northeastern University, Bachelor of Science in Architecture

**Selected Projects**

MetroMark Apartments at Forest Hills Station, Boston, MA—283 units for The Brennan Group and John M. Corcoran Company

380 Harrison Avenue, Boston, MA—273-unit, 14-story, 356,500 SF mixed-use development

Affordable Housing Development, Brockton, MA—48 units for NeighborWorks Southern Mass

248 Dorchester Avenue, South Boston, MA—Six-story, 43,650 SF boutique hotel development

The Revitalization of Jefferson Park State, Cambridge, MA—104 units for the Cambridge Housing Authority (while with Abacus Architects+Planners)

Jewish Community Housing for the Elderly, Boston, MA (while with Abacus Architects+Planners)

Westwood Apartments, Westwood, MA—for the New Bedford Housing Authority (while with Abacus Architects+Planners)

Allison Savage AIA, LEED Green Assoc.  
Project Manager

Allison joined Utile in January 2014 as a designer. She was involved with all phases of the 283-unit, mixed-use MetroMark Apartments at Forest Hills Station in Boston’s Jamaica Plain neighborhood, from schematic design through construction administration. She is currently involved with the design of 380 Harrison Avenue, a 14-story mixed-use development in Boston’s South End.

Allison received her Master of Architecture degree from Northeastern University. Her thesis project focused on the feasibility of Air Rights projects, specifically on the parcels located over I-90 in downtown Boston, which was displayed for several months at the BSA’s Rights of Way: Mobility in the City exhibition.

Allison is originally from upstate New York but often moved around, growing up in The Netherlands and England before settling in Boston.



## utile

Eric Boatright AIA  
Associate, Project Architect

Eric Boatright is a senior architect and project manager. He served as project manager for 88 Hudson Street, a 51-unit affordable condominium project in the heart of Chinatown for the Asian Community Development Corporation. After leading Utile’s effort at Spencer Green in Chelsea, MA, Eric briefly left the firm. He formed an expertise in off site construction at Integrated Design Group while supporting the production of a modular data center.

Prior to returning to Utile, Eric served as the interior architect for Assembly Row Block 6 in Somerville, MA, a 417-unit mixed-used development consisting of a 19-story tower and 6-story podium building while with ADD Inc. (now Stantec). He has previously worked on the planning, design, and execution of university lab buildings and hospitals in Los Angeles, CA and Worcester, MA.

He is a graduate of Brown University and the Southern California Institute of Architecture, where he served as student body president. Eric is a registered architect in the Commonwealth of Massachusetts.



### Education

Southern California University,  
Master of Architecture

Brown University, Bachelor of Arts,  
Urban Studies/Affairs

### Selected Projects

88 Hudson Street Condominiums,  
Boston, MA—51 units of affordable  
housing for Asian CDC

Spencer Green, Chelsea, MA—48  
units of affordable housing for The  
Neighborhood Developers

Readville Yards Industrial  
Development, Hyde Park, Boston, MA

MIT Samuel Tak Lee Building  
Renovations, Cambridge, MA—for the  
Department of Urban Studies

Belmont Day School Field House,  
Belmont, MA

Assembly Row Block 6, Somerville,  
MA—Interior architect for a 417-unit  
mixed used development consisting of  
a 19-story tower and 6-story podium  
building. (Completed while with ADD  
Inc.)

# Utile's Selected Experience



E +

utile

# Boston, Massachusetts



For the E+ housing challenge, organized by the City of Boston, Utile worked with GFC Development to devise a well-balanced concept that could be flexible, adaptable, redeployable, and conceived of sound economic principles. The maximum-efficiency building envelope is complemented by on-site energy generation strategies. Independent of occupants' activities and travel habits, E+ has a zero carbon footprint. The larger composition carefully considers the scale and materials of the neighborhood, and the project is positioned—aesthetically, urbanistically, technically, and economically—as part of the thoughtful evolution of the city's building fabric.

**Client**

Boston Redevelopment Authority

**Type**

Multifamily housing, sustainable, energy positive

**Year/Status**

2011

**Cost**

\$185 per sqft, \$277,500 each townhouse

**Scale**

2 townhouses (1,500 square feet each)

**Scope of Services**

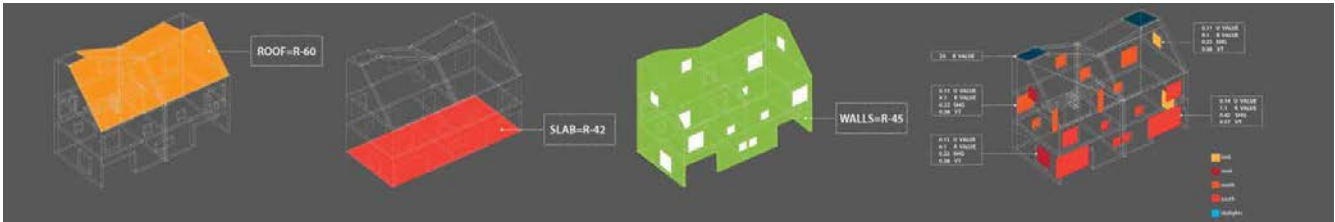
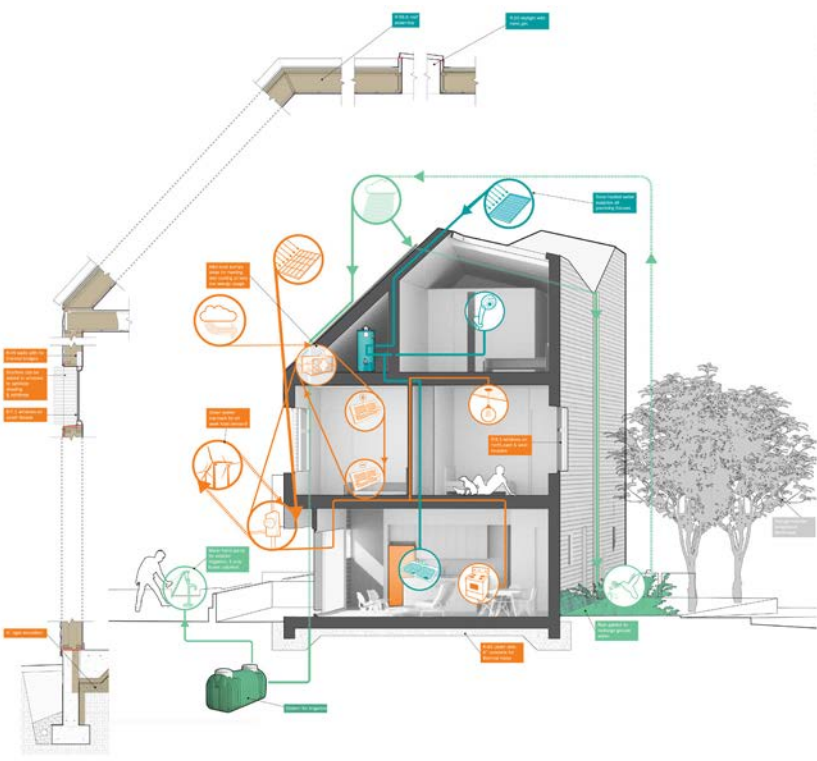
Architecture, site planning

**Key Consultants**

GFC Development

New Ecology

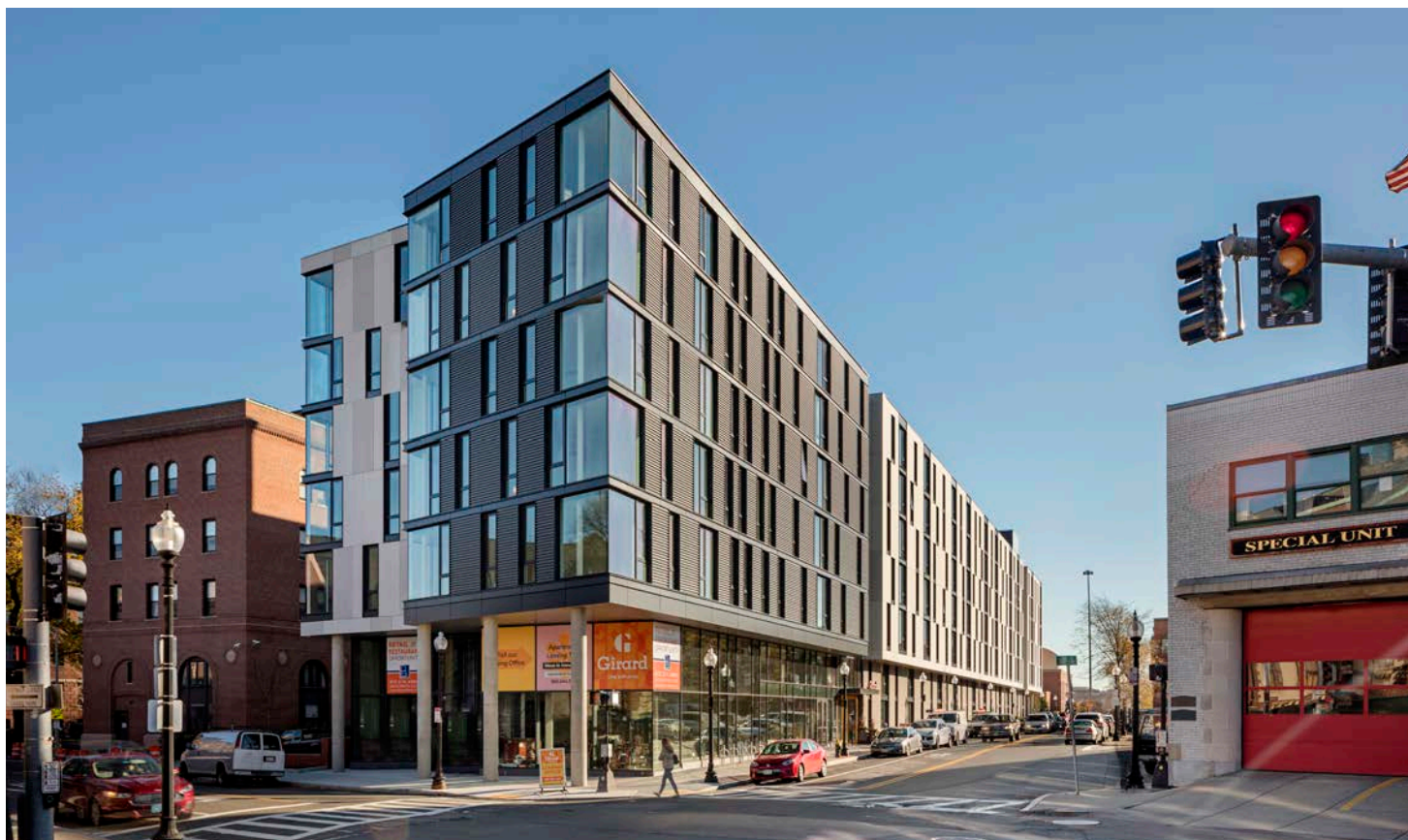




# Girard

## Boston, Massachusetts

utile



Utile and New Atlantic Development's mixed-use apartment complex, named after American textile designer Alexander Girard, opened its doors to tenants in September 2016. The 160-unit building totals approximately 240,000 square feet with 3,600 square feet of ground floor retail. Despite residing in the South End Landmark district, the building's exterior is decidedly contemporary. Rather than recreate a historicism that would never rise to the nobility of the surrounding context, Girard emulates its neighbors by deploying wall depth, texture, and play of light and shadow to activate its facades.

Common spaces include thoughtfully curated furnishings that honor

mid century design, a roof terrace with gas fire pit looking to panoramic views of Boston, and an open common area complete with a kitchen and library. Additionally, Girard hosts a gallery featuring a rotation of local artists to celebrate the South End SoWa Art & Design District's rich artist culture.

**Client**

New Atlantic Development

**Type**

Mixed-use development, apartments, new construction

**Year/Status**

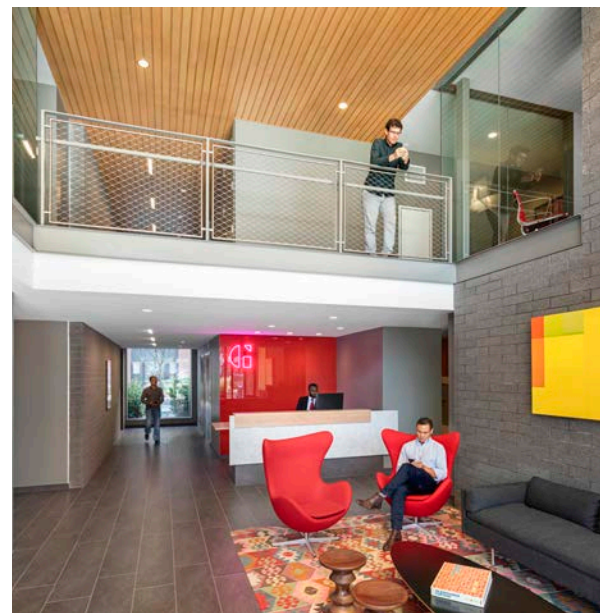
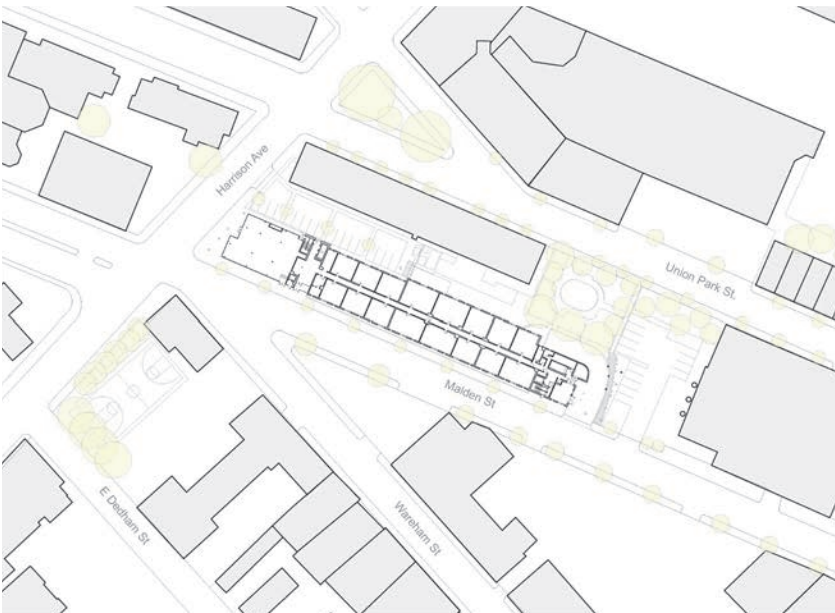
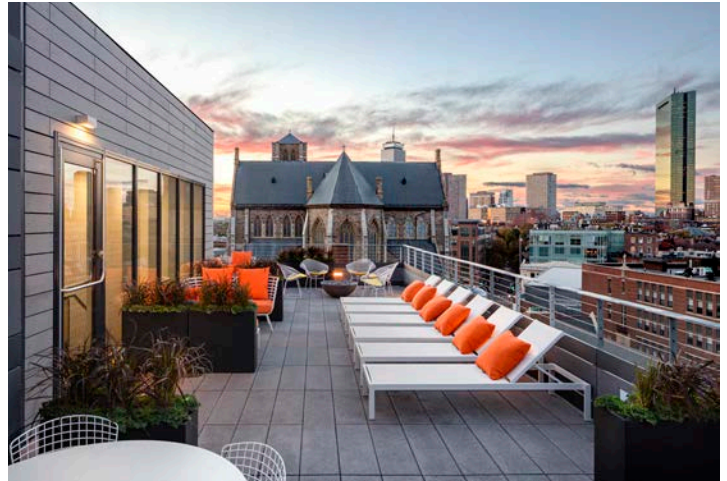
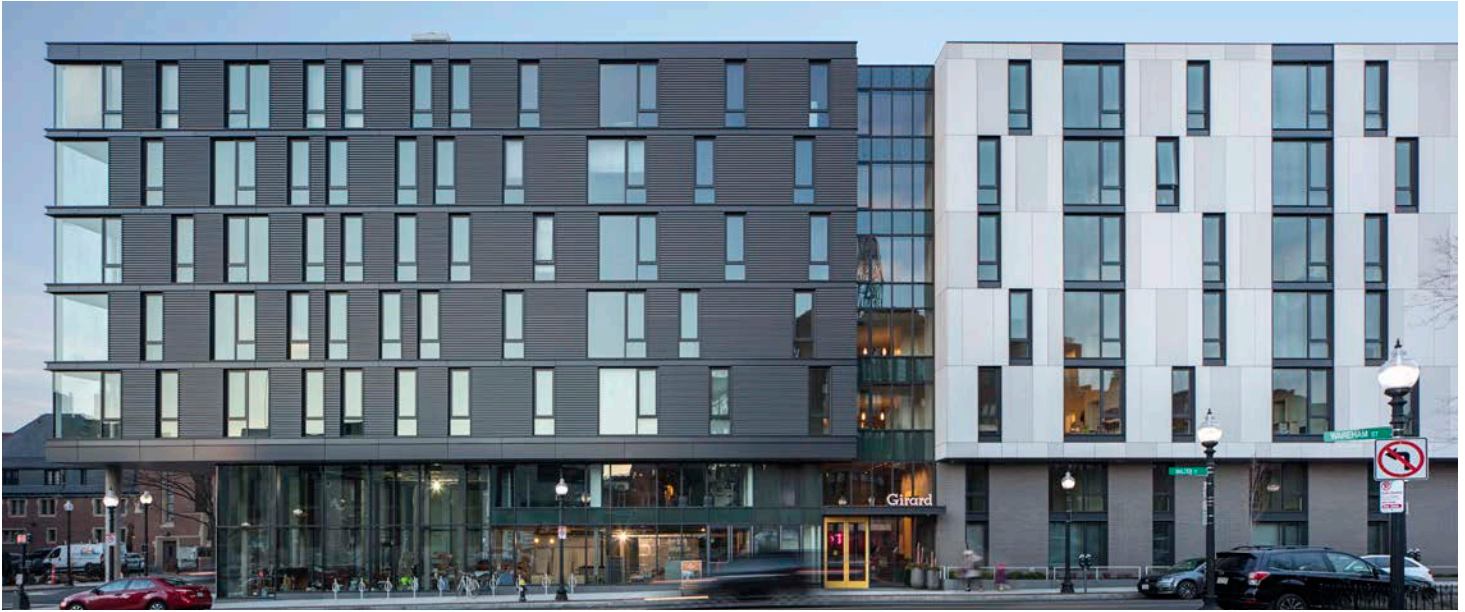
September 2016

**Scope of Services**

Architecture; interior design

**Size**

160 units; 240,000 SF



# Upper Washington Dorchester, Massachusetts

utile



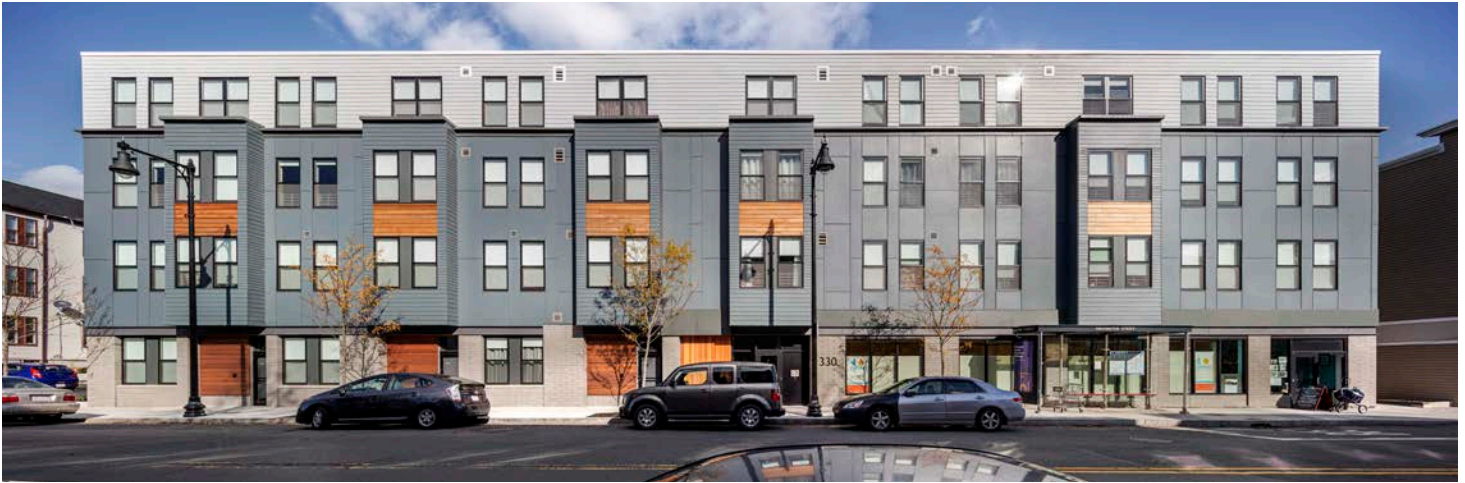
Utile worked with community development corporation VietAID to create Upper Washington Street Housing, a mixed-use development with 35 units of multifamily housing and 3,000 square feet of commercial and community space in the Four Corners neighborhood of Dorchester.

The project is comprised of two buildings that bring essential density and definition to the neighborhood. Ground level retail and community-oriented space help create an active street edge to maintain "main street" qualities of the block, while town-

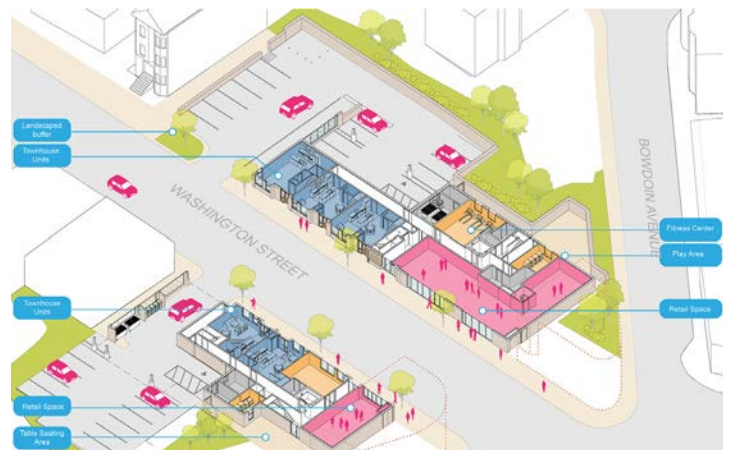
house-style units further define the street frontage with the rest of the rental units on upper floors. The back of each building has designated open space for casual seating and a play area. While the building's design is contemporary to reflect aspirations of a revitalized neighborhood, it also strives to respect the scale and character of the existing neighborhood fabric.

Doors opened to residents in March 2017, bringing affordable housing to Dorchester. Upper Washington also provides commercial space to sup-

port local and minority businesses, expands the customer base for established businesses, and contributes to the ongoing revitalization efforts of the neighborhood.

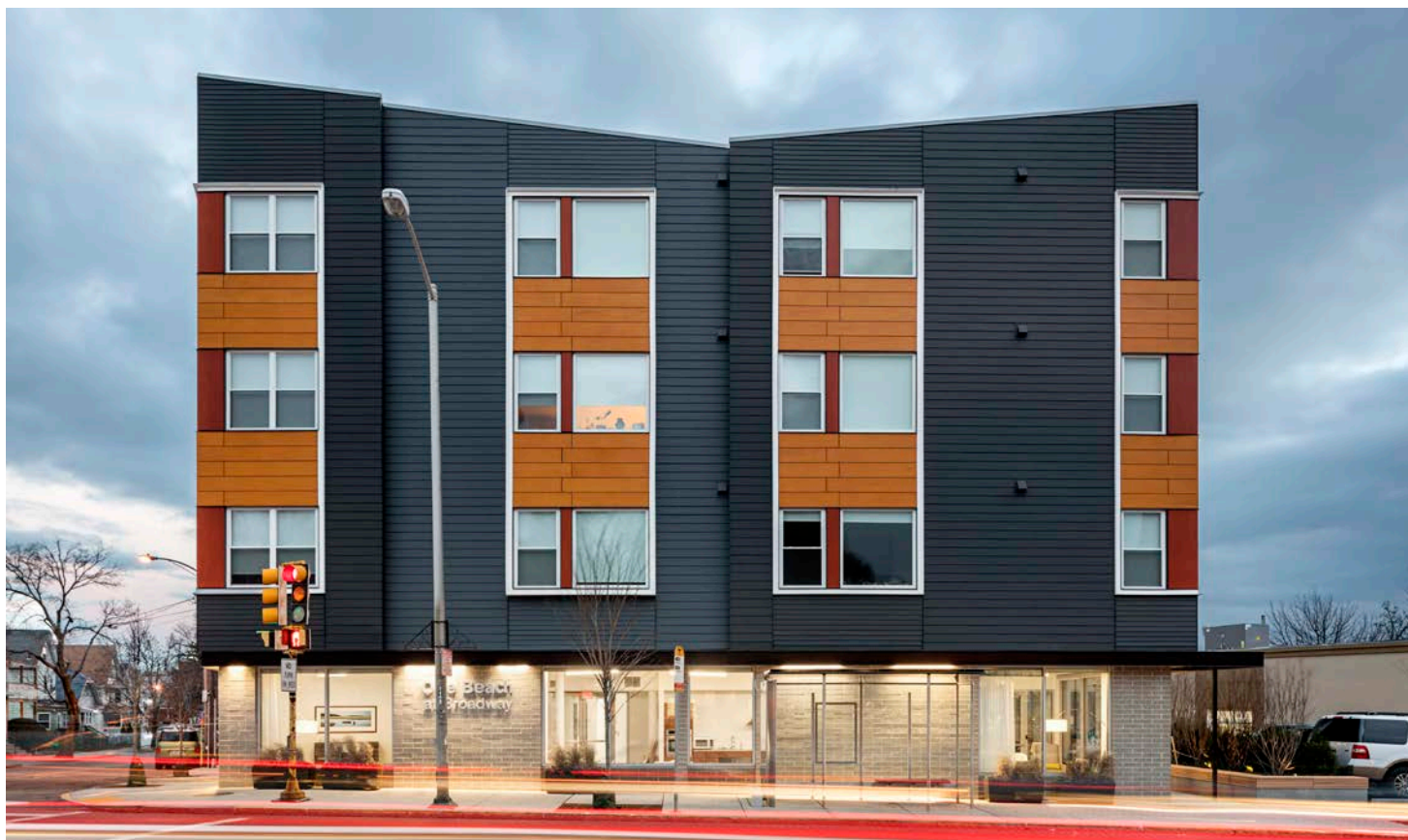


**Client**  
 Vietnamese American Initiative for Development (VietAID)  
**Type**  
 Multifamily housing, retail  
**Year/Status**  
 2017  
**Budget**  
 \$14,500,000  
**Scale**  
 35 units  
**Scope of Services**  
 Architecture, site planning

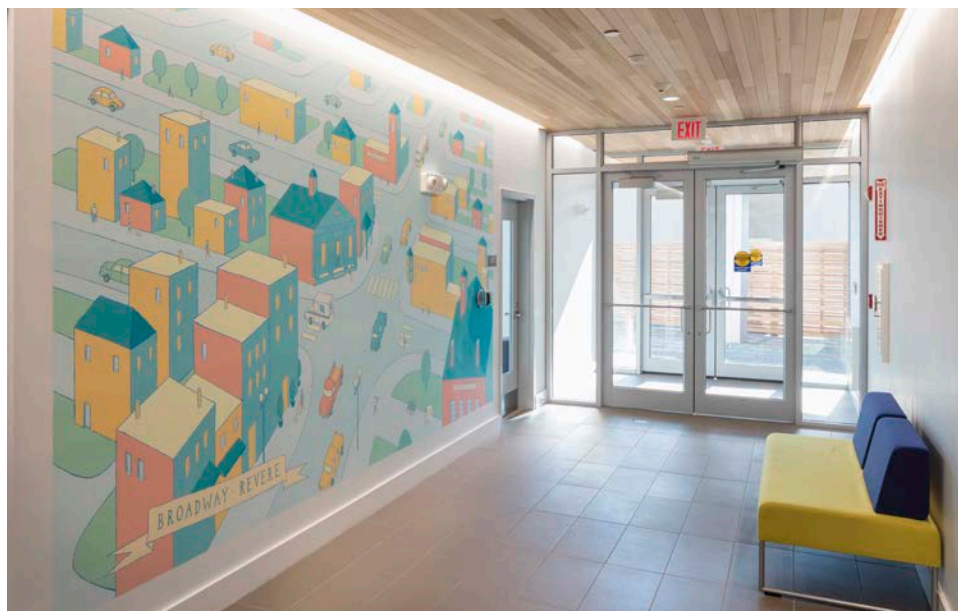


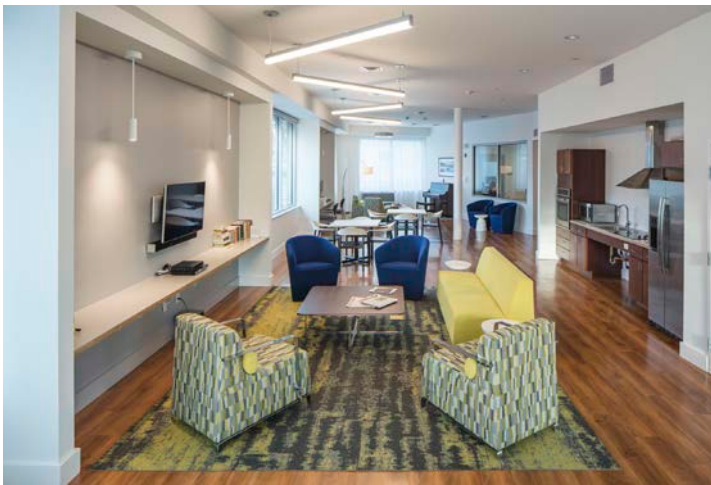
# One Beach At Broadway Revere, Massachusetts

utile



Utile worked with The Neighborhood Developers (TND) to bring 39 units of affordable senior housing to downtown Revere, as part of the city's ongoing revitalization. The new construction development features 39 rental apartments in a four-story building, with a mix of one-bedroom and two-bedroom homes. The central location provides residents convenient access to MBTA bus routes, civic services, local retail, and parks. Amenities include a community room to host residents' events and TND programs, a fitness room, onsite parking, laundry, and an outdoor courtyard. The sustainable building was designed and constructed to receive LEED Mid-Rise certification.





**Client**  
The Neighborhood Developers  
**Type**  
Senior Affordable Housing  
**Year/Status**  
2016  
**Services**  
Architecture  
**Size**  
39 units  
**Cost**  
\$11.4M



# 88 Hudson St. Condominiums

## Boston, Massachusetts

utile



Built on land reclaimed from the Central Artery Big Dig, 88 Hudson Street Condominiums—also known as Parcel 24 South—is a 51-unit affordable condominium project in the heart of Chinatown, jointly developed by the Asian Community Development Corporation and the New Boston Fund.

The project features nine duplex townhouses with direct entrances from the street to enhance the neighborhood's urban vitality. Four stories of flats are located above the townhouses with views across the Central Artery to South Boston. The project fronts a new major public open space to the north and shelters an intimate private green space to the south.

**Client**

Asian Community Development Corporation

**Type**

Affordable multifamily housing

**Year/Status**

November 2017

**Budget**

\$20M

**Scale**

51 units

**Scope of Services**

Site Planning, Architecture

**Key Collaborators**

Richmond So Engineering

New Ecology, Inc.

BLW Engineers

G2 Collaborative

Samiotes



# First+First

utile

## South Boston, Massachusetts

First + First is a development of 22 new single-family rowhouses sited on the boundary between traditional South Boston and the industrial waterfront. Each house includes a two-car garage accessed from the rear and a front stoop, entryway, and mudroom facing the street. The second-floor is the main living level, designed as an open loft-like space. To accommodate a variety of bedroom, home office, and family room scenarios, the third floor includes two rooms and a bathroom, while the fourth floor includes a room, bathroom, and terrace. The houses

are aggregated on the street to invoke the scale and character of similarly scaled streets in South Boston. The same house type is deployed in series and in book-matched pairs to create a variety of scales. As a gesture to the larger urban fabric, special units were designed at the corners. Sidewalk-front gardens, front stoops, and entryways were carefully conceived so that the development makes a contribution to the social fabric of the existing neighborhood.

**Client**

Trocadero Development, LLC / Pappas Properties

**Type**

Housing, single-family townhouses, condominiums, market rate and affordable

**Year/Status**

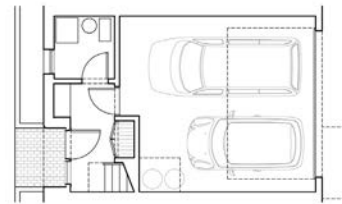
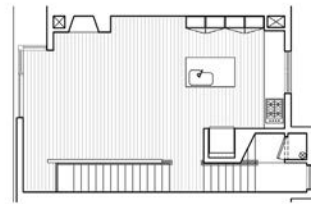
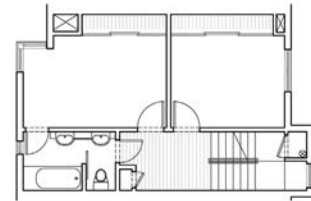
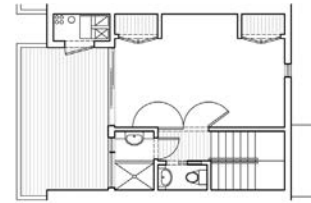
2012

**Scope of Services**

Architecture, site planning

**Sustainability**

LEED Gold certified; Energy Star

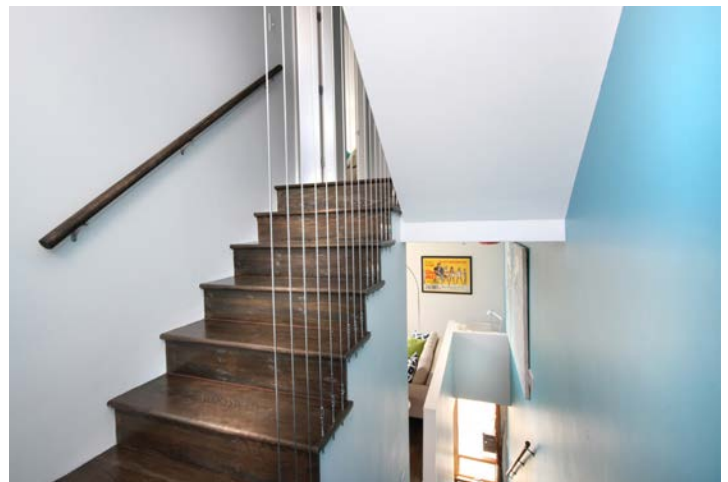


The townhouse arrangement allows all circulation to be internal to the unit, and thus minimizes the net-to-gross loss for developer.



Unit elevations are designed to be either slip-matched or book-matched to maximize streetscape variety. Facades are also designed with window configuration options that maximize opportunities for variety.

Interiors take full advantage of the ample light afforded by intelligently placed windows and creative use of materials, while clever built-ins maximize storage.



# Hyde-Blakemore Roslindale, Massachusetts

utile



The Hyde-Blakemore Condominiums is an affordable housing development with Urban Edge providing 13 units in three buildings along Hyde Park Avenue in Roslindale. Two duplexes draw from the existing character of houses found in the immediate vicinity, along Hyde Park Avenue. At the intersection with Blakemore Street, a new three-story 9-unit residence finds its inspiration in similar prec-

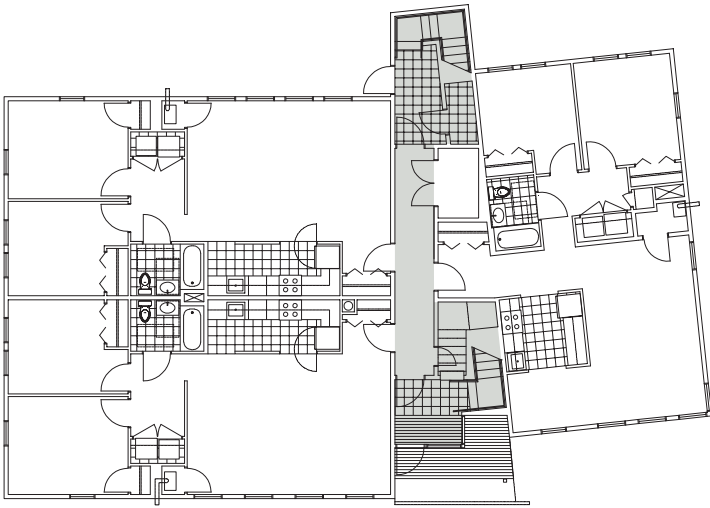
edents and vernacular motifs found elsewhere in the neighborhood. The three ground-floor units in the larger building are accessible, and all units in all three buildings are Energy Star Rated. Units in each of the duplexes will take advantage of solar power through photovoltaic panels to be installed on the roof. Each building will be separated from its neighbor with a carefully considered landscape strategy. Not only will this take into account the desire for more greenery as well as privacy between buildings, but also will address other environmental issues, such as storm water run-off through grading and the use of bioswales.

**Client**  
Urban Edge Development  
**Type**  
Multifamily housing, affordable, rental  
**Year/Status**  
2008  
**Budget**  
\$2,528,857  
**Scale**  
13 units  
**Scope of Services**  
Site Planning, Architecture

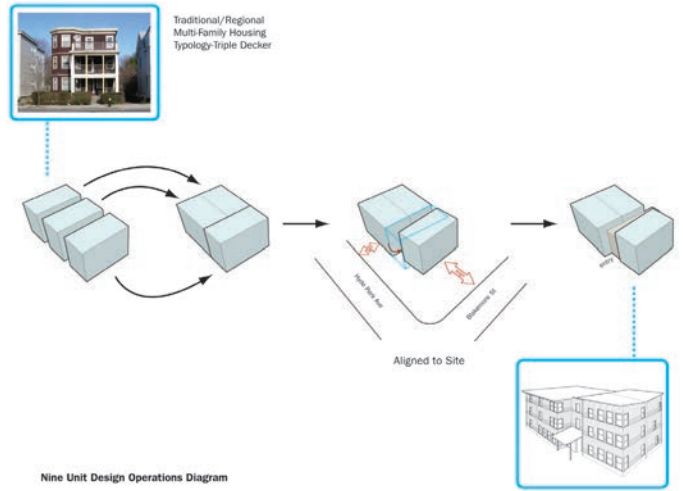


Duplex Building

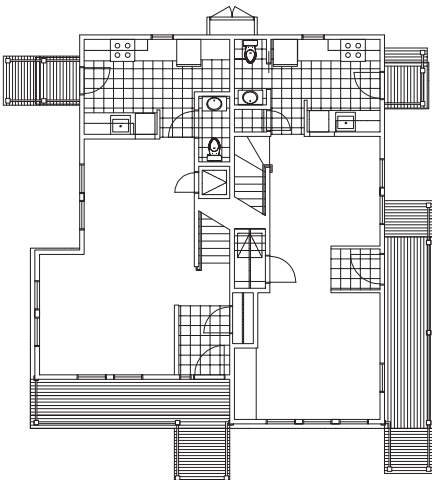
3 Story Nine-Unit Building



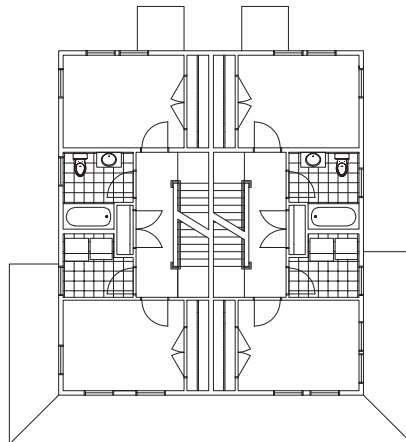
Nine-Unit Ground Level



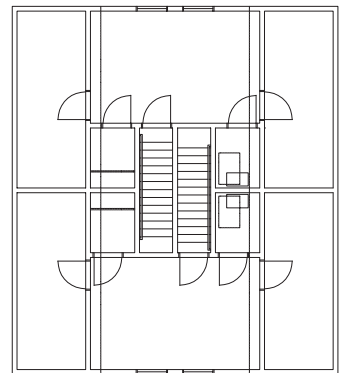
Nine-Unit Design Operations Diagram



Duplex Ground Level



Duplex Level Two



Duplex Level Three



## Company Profile

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Founded in 2007, Advanced Building Analysis, LLC set out to provide clients with unbiased and quantifiable assessments of building energy use and related building science.

HERS Rating is the basis of our core competencies, and we have found success in delivering our mission through the many programs that are based on HERS Rating.

We deliver consulting, energy modelling, inspections, testing, and submissions to meet the myriad requirements and goals of the following programs:

- ✓ ENERGY STAR Homes
- ✓ Zero Net Energy Ready Homes
- ✓ Passive House Institute United States
- ✓ LEED for Homes
- ✓ National Green Building Standard
- ✓ Residential IECC and MA Stretch Energy Code
- ✓ MassSave Residential New Construction

Our main office is in Amesbury, MA, and we work on a wide variety of large projects from Maine to Rhode Island.

Our staff is led by Gail Browne, majority owner and operations manager. Our HERS Raters include Michael Browne, founder and principal HERS Rater; Dan Clark, senior HERS Rater; and HERS Raters Stephen Weglarz and Samuel Kenney.

We intentionally remain a small, mission-driven company which can flexibly provide a wide variety of services with an extremely well-qualified team. Our modest size allows us to quickly adapt along with the rapidly evolving marketplace, and provide excellent service to each and every client.

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Advanced Building Analysis, LLC is a registered EPA ENERGY STAR Partner



2 Woodlawn Street, Amesbury, Massachusetts, 01913

[www.advancedbuildinganalysis.com](http://www.advancedbuildinganalysis.com)

## **Michael Browne**

2 Woodlawn Street, Amesbury, MA 01913  
[mike@advancedbuildinganalysis.com](mailto:mike@advancedbuildinganalysis.com) / 978-270-3911

### **EXPERIENCE:**

#### *Founder / Principal HERS Rater*

Advanced Building Analysis, LLC, Amesbury, MA 2007 - Present  
Founder of Advanced Building Analysis as a sole proprietor in 2007 and transitioned in 2008 to an LLC with 3 owner/employees. Technical lead of Advanced Building Analysis, HERS Rater, ENERGY STAR Homes Rater Partner, LEED for Homes Rater, National Green Building Standard Verifier, PHIUS+ Rater, PHIUS+ Multifamily Verifier. ABA provides plans analysis, 3D modeling, diagnostics testing, energy auditing, infrared imaging drone imaging and infrared and visual inspections of construction sites, educational outreach, and marketing assistance. ABA also provides verification services for IECC/energy code compliance, MA Residential New Construction Program, and the NH ENERGY STAR Homes Program.

#### *CNC Woodworker and Programmer*

Mark Richey Woodworking, Newburyport, MA 2004 - 2007  
CNC Programmer for architectural woodworking company

#### *Boatbuilder/Manager*

Lowell's Boat Shop, Amesbury, MA 1997 - 2003  
Manager and Boatbuilder for traditional wooden boat shop. Lowell's Boat Shop is a National Historic Landmark

### **EDUCATION:**

Bachelor of Science, Materials Engineering, Brown University 1994  
Apprenticeship in wooden boatbuilding, Apprenticeship of Rockland, ME 1997

### **CERTIFICATIONS:**

RESNET QAD, RESNET Trainer, RESNET HERS Rater, ENERGY STAR Homes Rater, LEED for Homes Rater, National Green Building Standard Verifier, PHIUS+ Rater, PHIUS+ Multifamily Verifier, Level 2 Thermographer, FAA Remote Pilot License

### **COMPUTER SKILLS:**

Microsoft Office, RemRate, Ekotrope, Sketchup, and Pix4D (drone photogrammetry software)

### **CIVIC INVOLVEMENT:**

Volunteer on the Energy Advisory Committee to the Massachusetts Board of Building Regulations and Standards (BBRS), Amesbury Energy Committee, Massachusetts Governor's Zero Net Energy Buildings Advisory Council, board member of North East HERS Alliance, and president of Energy Raters of Massachusetts, Inc.

**INTERESTS:** Sailing, electric vehicles, photography, and drone imaging and racing



## COMPANY INTRODUCTION

NEI was founded in 1998 on the principles of integrity, experience and diligence. Honest, principled dedication to our clients and our work is what both defines us and separates us from our competitors. Our clients come first; and our unmatched industry experience influences NEI's clear efficient path to success.

A successful project is not merely measured in dollars and calendar days. The most important measure of a project is how well it delivers the Client's mission at completion. We are partners with our clients in the process. Through open, collaborative communication we fully embrace and join in ownership of their mission. It becomes the guiding force that drives

the constant and earnest efforts we bring to each project.

Strong partnerships build lasting projects and relationships. Our commitment to our clients and the success of our projects are demonstrated by the extent of repeat clients and direct referrals, which comprise the majority of our work.

## CAPABILITIES

Since 1998, NEI General Contracting has provided a full spectrum of General Contracting and Construction Management services to the construction market. NEI offers Owners and Developers a fast-paced, first class, quality approach to any type of construction need. NEI has completed over \$1 Billion in quality construction projects spanning a wide variety of types and programs. From residential developments, to historic conversions & restorations, to moderate rehabilitation, to institutional projects, NEI has the expertise and capacity to meet any construction challenge.

*“NEI’s ability to work effectively and efficiently with the design team, deliver an exceptional final product, and exceed all expectations are some of the many benefits we bring to each project.”*

Our deep resources and broad industry experience offer our clients an unparalleled tool for project development and exceptional capabilities for construction.

- **Preconstruction.** Our skilled team of preconstruction and construction professionals has extensive experience working with a variety of complex project structures executing successful construction strategies within those challenging conditions.
- **Technical Expertise.** Our team’s experience in unique and varied building types provides NEI the ability to anticipate many potential coordination and integration conflicts in advance and offer efficient solutions within the design intent.
- **Site Management.** Workplace safety, efficient coordination of site activities, community engagement, appropriate storage of materials and site security are the foundation of any NEI project.
- **Project Management.** NEI has managed successful projects ranging in size up to \$50,000,000.

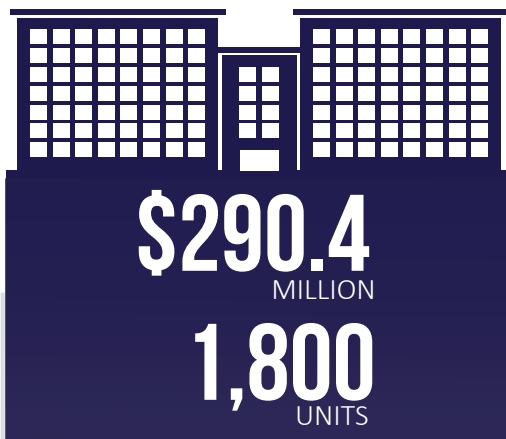


- **Budget Control.** NEI has a proven track record delivering projects on-time and within budget. Nearly all NEI projects within the past 5 years have been delivered with excess contingency monies, creating opportunities for Owner enhancements.
- **Value Engineering.** NEI’s skilled professionals collaborate closely with the design team and trade professionals to identify and develop value engineering and scope adjustments to offer reductions in the project construction cost.
- **Scheduling.** NEI constantly analyzes project performance to maintain smooth workflow in order to provide a real-time understanding of the project status and the effect each decision may have on the delivery schedule.
- **Risk Management/Safety.** NEI places a high value on safety with dedicated Risk Management and Safety teams that monitor and mitigate construction risks.
- **Quality Assurance/Control.** NEI has a Quality Assurance/Quality Control coordinator on staff who is responsible for managing our Quality Control program and ensuring that all our projects are built in compliance with the contract documents to ensure we deliver the high quality project our clients have come to know.



## NEW CONSTRUCTION

**E**very day NEI has projects underway across the country spanning a wide variety of types and programs. No matter the sector or scale, NEI has the expertise and capacity to meet any construction challenge.





## ARLINGTON 360

**LOCATION:** Arlington, MA  
**CLIENT:** Jefferson Apartment Group  
**ARCHITECT:** The Architectural Team  
**CONTRACT VALUE:** \$43 Million  
**UNITS:** 176



## ONE WEBSTER

**LOCATION:** Chelsea, MA  
**CLIENT:** Synergy Investment & Development  
**ARCHITECT:** ICON Architecture  
**CONTRACT VALUE:** \$13.9 Million  
**UNITS:** 120



## GORHAM STREET APARTMENTS

**LOCATION:** Lowell, MA  
**CLIENT:** Coalition For A Better Acre  
**ARCHITECT:** Davis Square Architects  
**CONTRACT VALUE:** \$6.3 Million  
**UNITS:** 24



## JACKSON COMMONS

**LOCATION:** Roxbury, MA  
**CLIENT:** Urban Edge  
**ARCHITECT:** Prellwitz Chilinski Associates, Inc  
**CONTRACT VALUE:** \$12.2 Million  
**UNITS:** 37



## BRIGHTON MILLS

**LOCATION:** Brighton, MA  
**CLIENT:** The Community Builders  
**ARCHITECT:** CBT Architects  
**CONTRACT VALUE:** \$6 Million  
**UNITS:** 20



## JANUS HIGHLAND APARTMENTS

**LOCATION:** Chelsea, MA  
**CLIENT:** The Neighborhood Developers  
**ARCHITECT:** ICON Architecture  
**CONTRACT VALUE:** \$7.5 Million  
**UNITS:** 41



## THE FLATS AT 22 & 44

**LOCATION:** Chelsea, MA  
**CLIENT:** Mitchell Properties LLC  
**ARCHITECT:** DMS Design LLC  
**CONTRACT VALUE:** \$16 Million  
**UNITS:** 96



## BOX WORKS

**LOCATION:** Chelsea, MA  
**CLIENT:** The Neighborhood Developers  
**ARCHITECT:** ICON Architecture  
**CONTRACT VALUE:** \$6.7 Million  
**UNITS:** 26



## PUTNAM GREEN

**LOCATION:** Cambridge, MA  
**CLIENT:** Homeowner's Rehab  
**ARCHITECT:** ICON Architecture  
**CONTRACT VALUE:** \$10.5 Million  
**UNITS:** 40  
**LEED:** Platinum



## HIGHLAND TERRACE

**LOCATION:** Chelsea, MA  
**CLIENT:** The Neighborhood Developers  
**ARCHITECT:** ICON Architecture  
**CONTRACT VALUE:** \$6.5 Million  
**UNITS:** 32  
**LEED:** Platinum



## 525 BEACH

**LOCATION:** Revere, MA  
**CLIENT:** The Neighborhood Developers  
**ARCHITECT:** ICON Architecture  
**CONTRACT VALUE:** \$6.4 Million  
**UNITS:** 30



## 189 BROADWAY

**LOCATION:** Revere, MA  
**CLIENT:** The Neighborhood Developers  
**ARCHITECT:** Utile, Inc.  
**CONTRACT VALUE:** \$7.8 Million  
**UNITS:** 39



## RESIDENCES AT STONYBROOK

**LOCATION:** Westford, MA  
**CLIENT:** Community Teamwork, Inc.  
**ARCHITECT:** Winslow Architects, Inc.  
**CONTRACT VALUE:** \$6.6 Million  
**UNITS:** 36



## 75 AMORY STREET

**LOCATION:** Jamaica Plain, MA  
**CLIENT:** Jamaica Plain Neighborhood Devel.  
**ARCHITECT:** Tise Design Associates  
**CONTRACT VALUE:** \$10 Million  
**UNITS:** 39



Outing Park

**FIRST RESOURCE DEVELOPMENT COMPANY**  
Norwell, MA

PROJECTS	TYPE	UNITS	COST
City View Commons	Mod Rehab	152	\$ 12.2 Million
City View Commons II	Mod Rehab	144	\$13 Million
Concord Heights	Mod Rehab	104	\$13 Million
First Resources Development Headquarters	Renovation	-	\$971,770
Outing Park	Mod Rehab	94	\$13.3 Million
Outing Park II	Mod Rehab	118	\$17.3 Million

**612 Units | \$69.7 Million**



Putnam Square

**HOMEOWNER'S REHAB, INC (HRD)**  
Cambridge, MA

PROJECTS	TYPE	UNITS	COST
Inman/CAST II Apartments	Mod Rehab	116	\$ 6.7 Million
Chapman Arms	Mod Rehab	50	\$4.1 Million
Putnam Green	New Construction	40	\$10.5 Million
Putnam Square	Mod Rehab	94	\$5.7 Million

**300 Units | \$27 Million**

Urban Edge  
Limited Partnership

**URBAN EDGE**  
Roxbury, MA

PROJECTS	TYPE	UNITS	COST
Urban Edge Limited Partnership	Mod Rehab	82	\$ 7.3 Million
LBB Apartments	Mod Rehab	103	\$8.4 Million
Jackson Commons	New Construction	152	\$12.2 Million
Wardman Apartments Phase II	New Construction	12	\$3.4 Million
Walnut Washington	Mod Rehab	65	\$6.7 Million

**414 Units | 38 Million**

Flats At 44

**MITCHELL PROPERTIES LLC**  
Boston, MA

PROJECTS	TYPE	UNITS	COST
Cable Mills	Conversion	82	\$17 Million
Atlas Lofts	Conversion	53	\$7 Million
The Marais	Conversion	8	\$5.5 Million
The Flats At 22	New Construction	50	\$8.9 Million
The Flats At 44	New Construction	46	\$7 Million

**239 Units | 45.4 Million**



Walden Firehouse

## THE NEIGHBORHOOD DEVELOPERS

Chelsea, MA

PROJECTS	TYPE	UNITS	COST
Box Works	New Construction	26	\$6.7 Million
Janus Highlands Homes	New Construction	41	\$7.5 Million
Spencer Green	New Construction	18	\$9.6 Million
Spencer Row	New Construction	32	\$5.9 Million
Highland Terrace	New Construction	32	\$6.5 Million
CONNECT Center	Addition	-	\$872,000
Walden Fire House	Historic Conversion	7	\$1.4 Million
525 Beach Street	New Construction	32	\$6.4 Million
North Bellingham Veteran's Housing / SRO	Historic Conversion	9	\$1.6 Million
158-162 Shawmut Street	New Construction	4	\$906,000
189 Broadway	New Construction	39	\$7.8 Million

**240 Units | 55.1 Million**



## BENJAMIN COULEHAN LEED AP

### Director of Preconstruction

#### PROJECT EXPERIENCE:

**Arlington 360** **\$41 Million**  
 Arlington, MA  
 200 new townhomes and apartment units

**Boott Cotton Mill Apartments** **\$25 Million**  
 Lowell, MA  
 Historic conversion of 500,000 SF multiple-building property into a vibrant 150 unit mixed-use complex

**One Webster** **\$13.9 Million**  
 Chelsea, MA  
 120 unit new residential construction with retail space

**YWCA Cambridge** **\$8 Million**  
 Cambridge, MA  
 103 unit occupied rehabilitation

**Highland Terrace** **\$6.5 Million**  
 Chelsea, MA  
 32 unit new residential construction

**Hillcrest Oaks Apartments** **\$7 Million**  
 Attleboro, MA  
 93 unit occupied rehabilitation

**Atlas Lofts** **\$7 Million**  
 Chelsea, MA  
 Historic conversion of a 1918 warehouse building into 53 loft-style apartments

### ABOUT BENJAMIN

As Director of Preconstruction, Benjamin's primary focus is to ensure clear and comprehensive coordination between the design team and the construction team during project development and prior to the start of construction. Benjamin brings both a rich architectural background and sustainable design sensibility to the construction process. Benjamin oversees NEI's preconstruction team and provides assistance with project assessment, document coordination, detailed project scoping, and contract strategies.

**Previous Employers:**  
 LaFreniere Architects, Inc.  
 The Architectural Team, Inc.  
 ECI/Hyer, Inc.



#### EDUCATION & CERTIFICATIONS

**Wentworth Institute of Technology**  
 Boston, MA  
 BS Architectural Engineering

**Certifications:**  
 · OSHA 10 Hour Training Course  
 · LEED Accredited Professional

**Fun Fact:** Once residing in Alaska, Ben is a licensed pilot who loves to run marathons.



## **BILL YOUNG** General Superintendent

### PROJECT EXPERIENCE:

<p><b>Gorham Street Apartments</b> Lowell, MA 24 unit new residential construction</p>	<p><b>\$6.3 Million</b></p>
<p><b>Highland Terrace</b> Chelsea, MA 32 unit new residential construction</p>	<p><b>\$6.5 Million</b></p>
<p><b>FP3, 346 Congress Street</b> Boston, MA Historic conversion of a 100 year old building into 92 new premium condominiums</p>	<p><b>\$42.5 Million</b></p>
<p><b>Mandarin Hotel and Residences</b> Boston, MA New construction of a 450,000 SF mixed-use complex consisting of two 14-story towers</p>	<p><b>\$250 Million</b></p>
<p><b>One Webster</b> Chelsea, MA 120 unit new residential construction with retail space</p>	<p><b>\$13.9 Million</b></p>
<p><b>Harvard Business School McArthur Hall</b> Cambridge, MA New construction of a 102,000 SF 6-story housing facility consisting of 170 units</p>	<p><b>\$23 Million</b></p>

### ABOUT BILL

Bill brings the experienced and critical construction eye of a **General Superintendent** to the preconstruction process. Bill has tremendous experience building projects ranging from museums to mills rehabilitations on all types of sites, both complex urban and open. Bill's primary focus is the analysis of the civil, structural and MEP scopes of work to ensure the efficient constructability of the project. He will also assist with the development of site logistic and operations strategies to ensure swift and efficient completion of the project.

**Previous Employers:**  
Linbeck Construction  
Suffolk Construction  
Skanska USA  
ICOS-Boston



### EDUCATION & CERTIFICATIONS

- |   |  |
|---|--|
| <p><b>Wentworth Institute of Technology</b><br/>Boston, MA<br/>BS Building Construction</p>                           | <ul style="list-style-type: none"> <li>· ACI Concrete Field Testing Technical License</li> <li>· City of Boston, ABC License</li> <li>· City of Cambridge, ABC License</li> <li>· CPR Certified</li> <li>· First Aid Certified</li> <li>· Mass Hoisting License</li> <li>· Lead RRP Certified</li> </ul> |
| <p><b>Certifications:</b><br/>· OSHA 30 Hour Training Course<br/>· Massachusetts Construction Supervisors License</p> |  |

**Fun Fact:** Whether skiing or hiking, you can find Bill outdoors on his time off.



## JOE RETTMAN

### Managing Principal

Construction is in Josef Rettman’s blood. As the grandson of a City of Boston road and sidewalk contractor and the son of a general contractor, Rettman’s path to construction success was quite literally set in stone from an early age.

After graduating from Syracuse University in 1994, Rettman followed in his family’s footsteps, landing a position at Keith Construction, Inc. He helped build the company until his departure. In 2003, Rettman was approached by his longtime friend, Kevin Fish of Northeast Interiors, to join forces and build a full-service construction company. Together, they launched NEI General Contracting.

NEI General Contracting has grown exponentially over the past 20 years because of a culture of competence. Behind every phone call, email and question is an answer from a company founded on reliability and partnership.

Rettman aims to tailor NEI’s approach to the client’s end goal. He works with customers to make the process as effective and seamless as possible. He challenges his team to think three-dimensionally – before the first stone is laid – to solve their client’s challenges prior to actually starting construction. And should problems arise? Rettman’s team is ready with solutions even beyond the one-year standard warranty. He is not one to shy away from a problem and customers know they can count on NEI to find a solution. It’s why NEI has tackled projects like the Lawrence Mills Renovation or the Atlas Lofts: where others see roadblocks, NEI sees possibility.

NEI’s continued dedication to the preservation of historic and landmark properties is evident in its expansive portfolio of successful projects. Renovations on these properties require a thorough understanding of the logistics involved in preparation and execution while preserving the critical historic fabric. As a direct result of NEI’s unwavering commitment and leadership to restoring historic properties, NEI was awarded the 2014 Preservation Massachusetts Paul Tsongas Award for Construction Planning in addition to eight other preservation awards for its work in the New England community.

Rettman’s involvement and support of many local charities and organizations speak to his goal of not only providing a useful and revitalized building, but a restored community presence as well.

**ABOUT JOE**

As Managing Principal, **Josef Rettman** strategically balances leading his team of 160 employees with commanding knowledge and tireless attention to detail on every project. His unstoppable drive and perseverance can be found in every aspect of the process to ensure successful project completion. As a testament to his leadership, NEI has retained 100% of their clients and has employees celebrating 10 year anniversaries.

# NEI

[WWW.NEIGC.COM](http://www.neigc.com)

**As a Result of Joe’s Leadership, NEI Has Completed:**

Historic:	\$208.6 Million		2,200 Units
Mod Rehab:	\$440.5 Million		5,200 Units
New Construction:	\$290.4 Million		1,800 Units
<b>Total Residential:</b>	<b>\$1 Billion</b>	<b> </b>	<b>9,200 Units</b>

1BILLION  
TOTAL WORK



## BRIAN PORTER Project Manager

### PROJECT EXPERIENCE:

**Bedford Place** **\$6.2 Million**  
Whitman, MA  
45 unit new residential construction

**Oak Place Apartments** **\$5.2 Million**  
Brockton, MA  
36 unit new residential construction

**Lyndhurst Washington** **\$4.4 Million**  
Roxbury, MA  
44 units: part renovation, part adaptive reuse, and part new construction

**Aaron Briggs Manor | Cherry Hill Apartments** **\$5.5 Million**  
Providence, RI  
161 unit occupied rehabilitation throughout two properties

**81 Birch Street Apartments** **\$4.2 Million**  
Abington, MA  
Conversion of a 36,000 SF commercial building into 30 apartments

**Mattapoisett Landing** **\$10.5 Million**  
Mattapoisett, MA  
27 new townhome style units

### ABOUT BRIAN

With nearly 30 years of experience in the construction industry, both as a senior project manager and supervising project superintendents, Brian brings a wealth of knowledge to each project he manages. As **Project Manager**, Brian will leverage that experience to organize and execute the project and trades for maximum construction and cost efficiency. Brian will attend preconstruction meetings as needed to assist with the definition of project scope, document development and project scheduling and phasing.

**Previous Employers:**  
Brophy & Phillips



### EDUCATION & CERTIFICATIONS

**Wentworth Institute of Technology**  
Boston, MA  
AAS Architectural Engineering

- Certifications:**
- OSHA 10 Hour Training Course
  - Massachusetts Construction Supervisor's License
  - Lead RRP
  - First Aid

**Fun Fact:** Outside of work, you can find Brian on the water where he enjoys fly fishing and boating.

101 Arch Street	1325 G Street, NW
Suite 1101	Suite 770
Boston, MA 02110	Washington, DC 20005
T 617.224.0600	T 202.842.9006
F 617.224.0601	F 202.842.3936



## INTRODUCTION TO KLEIN HORNIG LLP

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

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

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

Klein Hornig has 32 attorneys practicing locally and nationally out of offices in Washington, DC and Boston, Massachusetts. Using sophisticated technologies for communications, legal research and knowledge management, attorneys in the two offices can collaborate to provide the most efficient and effective legal services to our clients.

101 Arch Street  
Suite 1101  
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## Klein Hornig LLP

COUNSELORS AT LAW

### JOSEPH S. LIEBER

✉ [jlieber@kleinhornig.com](mailto:jlieber@kleinhornig.com)

☎ 617.224.0605

#### PRACTICE AREAS

- Real Estate and Affordable Housing
- Tax Credits
- Commercial Lending
- Condominiums
- Boston Zoning

#### EDUCATION

University of Michigan Law School, JD, 1996, *magna cum laude*

University of Michigan, BA, 1986, *Class Honors*



#### EXPERIENCE

Joseph Lieber's practice focuses on structuring and closing complex multi-phased financing transactions in connection with affordable housing and other community development projects. He has deep experience working with Low-Income Housing Tax Credits and New Market Tax Credits – including a number of projects in which these two types of tax credits have been used side by side – as well as projects utilizing a variety of other Federal, state and local funding programs. Most of his work is on the developer's side of the table, but Joseph has also represented commercial lenders, municipalities and regional HOME consortia. His work around the table has sharpened Joseph's ability to recognize and address the key issues facing the various parties to an affordable housing or community development transaction.

Joseph has a wide range of general real estate experience, including real property purchase and sale transactions (including the acquisition of property from the MBTA, DCAMM, the BRA and other public sources through land disposition processes), zoning and permitting matters, conveyancing, and contracting for design and construction services. He has particular expertise in Boston Redevelopment Authority matters such as Article 80 applications and MGL Chapter 121A applications, and in complex condominium structuring.

In his *pro bono* work, Joseph has represented low-income tenants in housing court, prepared petitions for self-sponsorship under the Violence Against Women Act for battered immigrant women, served as a volunteer mediator in small claims court, and negotiated office leases for nonprofit clients.

[www.kleinhornig.com](http://www.kleinhornig.com)



JOSEPH S. LIEBER

**BAR ADMISSIONS**

- Massachusetts

**TRANSACTIONS**

- For more than five years, has represented partnership of multiple community development corporations (CDCs) and one for-profit developer in connection with comprehensive redevelopment of the Jackson Square neighborhood in Boston (Jamaica Plain and Roxbury), including representation relating to infrastructure development and master planning, acquisition of project sites from the MBTA, DCAMM and other public agencies, negotiation of complex land use agreements with the MBTA and other public agencies, zoning the individual development projects, and structuring and closing of financing for individual development projects involving mixed commercial and residential uses, and utilizing a variety of tax credits and other local, state, and federal funding sources
- Represented joint venture of for-profit developer and local CDC in connection with all aspects of structuring, permitting and closing the financing for multi-phased redevelopment and adaptive reuse of a former Roman Catholic Archdiocese campus in Jamaica Plain, utilizing New Markets Tax Credits, Low-Income Housing Tax Credits, Section 1602 Exchange Funds, TCAP Funds and other financing sources within a complex multi-tiered condominium structure
- Represented Boston (Jamaica Plain) CDC in connection with structuring the joint venture redevelopment of former nursing home as a facility that addresses two separate needs of homeless persons – the delivery of medical services and the provision of rental housing
- Represented for-profit developer of artist housing in connection with the acquisition from the Boston Redevelopment Authority of a historic building in the South End of Boston and several surrounding vacant parcels, and the construction on the combined site of a three-building, 55-unit mixed-income, mixed-use condominium project with roughly 50% affordable "artist live/work" units, 11 artist rental studios and a street-level art gallery space
- Represented Dorchester Bay Economic Development Corporation in the New Markets Tax Credit-financed redevelopment of the former Pearl Meat plant in Boston's Dorchester neighborhood as a 36,000 square foot shared-use commercial kitchen and multi-tenant food production small business center. Among the various sources leveraged through the NMTC structure were City of Boston Section 108 funds, Choice Neighborhoods funds, a Massworks grant and various Federal and State grant funds.
- Represented Our Lady of the Elms College in the New Markets Tax Credit-financed development of a new state-of-the-art Center for Natural and Health Sciences on its Chicopee, Massachusetts campus. We were able to repurpose an existing 501(c)(3) affiliate of the College to serve as QALICB and owner of the project through a master lease structure. The College served as leverage lender, using MassDevelopment bond funds and capital campaign proceeds to fund the leverage loan.



JOSEPH S. LIEBER

- Represented leading Lowell, MA nonprofit community development corporation in connection with approximately half a dozen Low-Income Housing Tax Credit projects over the course of the past decade
- Represented a Boston-based bank in connection with numerous loans – including various types of construction, permanent and/or bridge financing, as well as tax-exempt bond-financed loans – for the renovation and new construction of affordable housing (rental and homeownership), transitional housing facilities, and cohousing projects located throughout the Greater Boston area
- Represented several Massachusetts municipalities and regional HOME consortia in connection with HOME funding to developers of affordable housing and the negotiation of intercreditor arrangements with other project funders
- Represented national developer in multi-phased HOPE VI revitalization of public housing in Frederick, MD
- Represented partnership of for-profit developer and Boston CDC in connection with three successive rental phases of a multi-phased redevelopment of a large former State hospital site in Boston (Mattapan), MA

#### ACTIVITIES

- American Bar Association, *Member* (2002-present)
- Massachusetts Real Estate Bar Association, *Member* (2006-present)
- Jamaica Plain Children's Soccer, Jamaica Plain Youth Soccer and Massachusetts Futsal Association, *Volunteer Soccer Coach and Manager* (scattered years, 2003-present)
- Jamaica Plain Regan Youth League, *Volunteer Baseball Coach and Board Member* (2005-present)
- West Roxbury Community Center, *Volunteer Basketball Coach* (2012)
- Curtis Hall Basketball League (Jamaica Plain), *Volunteer Basketball Coach* (2015)

#### EVENTS

- Guest Lecturer, "Affordable Housing Topics," MIT Center for Real Estate, Boston, MA – November 2012
- Panelist on 461 Walnut Avenue Permitting Issues, Urban Land Institute's Housing and Economic Development Council – April 10, 2012
- Presenter, "Legal Issues in Affordable Housing" Federal Home Loan Bank of Boston (FHLBB), Affordable Housing Competition Organizational Meeting – February 29, 2012
- Panelist on Transportation-Oriented Development, Boston Bar Association (BBA) Real Estate and Land Use Committee Meeting – January 30, 2012
- Panelist on New Markets Tax Credit and Affordable Housing, BBA Affordable Housing Committee Meeting – September 15, 2011
- Recipient, Civic Leadership Award from *Move Massachusetts 2000* for work in litigation involving the Massachusetts Turnpike Authority



## COOPERSTOWN environmental

# Cost Effective, Practical Environmental Solutions

For owners and developers faced with a contaminated property, Cooperstown Environmental is the engineering consultant that uses top-tier technical expertise to deliver responsive, cost-effective solutions for environmental challenges.

## Environmental Consulting Services

When it comes to solving your environmental challenges, we're ready to roll up our sleeves and get our hands dirty. Let us dig into your needs in all areas of environmental engineering, including:

- Massachusetts Contingency Plan (MCP) projects requiring a Licensed Site Professional (LSP) including testing, remediation, and reporting
- Sub-slab depressurization systems (SSD Systems or SSDS) and telemetry for vapor intrusion
- Brownfields redevelopment projects
- Underground storage tank (UST) removals and replacements
- Real Estate Environmental Site Assessments (ESAs) for buyers, sellers, and finance providers
- Contaminated soil management
- Regulatory compliance, public involvement, and litigation support
- Other environmental engineering consulting services

## Who Are Our Clients?

- Academic & Research Institutions
- Commercial Property Owners
- Real Estate Developers
- Gasoline Stations
- Environmental Consulting Firms and LSPs
- Fortune 500 Companies
- Not-for profit organizations (charities, community development corporations, etc.)
- State & Local Governments
- Lawyers & Accountants
- Real Estate Brokers
- Individuals/Homeowners

\*Cooperstown Environmental is a SDO (formerly SOMWBA) certified Women Business Enterprise (WBE)

Service areas include:  
Massachusetts, New Hampshire,  
Rhode Island, Connecticut and  
Maine

23 Main St.  
Andover, MA 01810

Phone: 978-470-4755  
Fax: 978-470-4756

info@cooperstownenv.com  
www.cooperstownenv.com

## COOPERSTOWN environmental

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**Susan D. Curtis**  
**Managing Principal**

### SUMMARY

Ms. Curtis has more than 20 years of progressive experience in the environmental field, specializing in Environmental Site Assessments, remedial investigations, feasibility studies, conceptual design, and subcontractor management for a variety of hazardous waste, industrial, and brownfields sites.

While working for a previous firm, she managed multiple hazardous waste projects for various Superfund sites under the EPA TES III and ARCS contracts. She also oversaw similar projects under the Massachusetts Contingency Plan (MCP) program and c.21E and New Jersey's ECRA program. All these projects entailed characterizing the nature and extent of contamination, developing remedial alternatives and specifications, and implementing cleanup plans. Ms. Curtis is knowledgeable about the associated permitting, public involvement, and sampling protocols required for hazardous materials handling.

Ms. Curtis is Founder and Managing Principal of **Cooperstown Environmental LLC**, a consulting firm providing environmental and engineering services to commercial/industrial, institutional, and local, state, and federal government clients, which is certified by the State Office of Minority and Women Business Assistance (SOMWBA) as a Women Business Enterprise, or WBE. In this capacity, she manages the overall business operations of the firm.

### EXPERIENCE HISTORY

**Cooperstown Environmental LLC** (2004 – present)

Andover, Massachusetts

Founder and Managing Principal

**Curtis Woodlands LLC** (1994 – present)

Cooperstown, New York

Vice President

**Camp Dresser & McKee Inc.** (1985 - 1995)

Cambridge, Massachusetts

Registered Professional Engineer & Project Manager

### EDUCATION

**University of Vermont**, B.S. - Civil Engineering

**Tufts University**, M.S. - Hazardous Materials Management

## REPRESENTATIVE EXPERIENCE

**EPA Superfund Program.** Ms. Curtis was the project manager for a fast-tracked, \$1.4 million Remedial Investigation/Feasibility Study (RI/FS) at a Superfund site under the EPA Arcs contract. She managed the project budget and schedule, completed the scope of work, maintained client contact during development of all planning documents, coordinated field investigations, and oversaw all subcontractors.

Ms. Curtis was also involved in numerous RI/FS projects for Region I EPA under the REM II contract. She generated reports, analyzed data, assessed clean-up alternatives, and implemented field-sampling programs.

**Massachusetts MCP.** As project manager, MS. Curtis directed the 21E studies at a former municipal incinerator site. Phase I and II of the study, including a human health risk assessment and associated Public Involvement Plan (PIP) activities, were completed under an \$113,000 contract. Clean-up actions were completed and a new municipal DPW garage was built on the site.

As part of a comprehensive inventory by the Massachusetts Division of Capital Planning and Operations (DCPO) agency, she assisted with preliminary audits of properties owned by the state of Massachusetts. This project included the identification of USTs, known environmental issues, former land dumping practices, PCB containing equipment, on-site septic systems and storm drainage systems, as well as recommendations for further remedial activities.

**New Jersey ECRA Program.** For an operating glass factory, Ms. Curtis developed specifications for the removal of two aboveground fuel storage tanks, associated piping, and soil beneath the tanks to the groundwater table. She followed through with the bidding /award process, directed the fieldwork, collected post excavation samples and written closure reports. She arranged for the off-site disposal of excavated soil at an asphalt batching plant and completed the necessary permitting.

**Other.** Under the Massachusetts Clean Lakes Program, Ms. Curtis assisted with diagnostic and feasibility studies for improving water quality of reservoirs and ponds. Traditional design experience includes assignments on water main design for the State of Rhode Island and the Town of Andover, MA.

## REGISTRATIONS & CERTIFICATIONS

- Massachusetts Registered Professional Engineer (Environmental) #35850 (Lapsed)
- OSHA Hazardous Waste Training - Level C
- OSHA Supervisor Training



*James T. Curtis, PE, LSP  
President*

## **SUMMARY**

Mr. Curtis, a registered Professional Engineer and Licensed Site Professional, has more than 25 years of progressive managerial and technical experience in a wide range of fields related to environmental management. With a strong educational preparation, experience, and necessary licenses, Mr. Curtis can demonstrate success in environmental compliance, site investigation and remedial programs, and construction-related project management. Mr. Curtis has lectured at MIT, Harvard, Cornell, and numerous other universities and professional venues on environmental topics.

As co-founder and President of Cooperstown Environmental LLC, a consulting firm providing environmental, LSP, and engineering services to commercial/industrial, institutional, and government clients, he oversees operations and has responsibility for the firm's financial performance. Mr. Curtis formerly maintained an appointment as the Senior Environmental Officer and Institute Licensed Site Professional at the Massachusetts Institute of Technology (MIT) following an extended tenure as a senior engineer at CDM, an international consulting firm.

Mr. Curtis is an acknowledged authority on the Massachusetts Brownfields Tax Credit Program and the firm has recovered millions of dollars for clients.

## **EXPERIENCE HISTORY**

### ***Cooperstown Environmental LLC*** (2004 – present)

Andover, Massachusetts  
President

### ***Massachusetts Institute of Technology*** (1999 - 2006)

Cambridge, Massachusetts  
MIT Senior Environmental Officer and Institute Licensed Site Professional

### ***Curtis Woodlands LLC*** (1994 – present)

Cooperstown, New York  
Founder & Chief Financial Officer

### ***Camp Dresser & McKee Inc.*** (1986 - 1999)

Cambridge, Massachusetts  
Senior Environmental Engineer & Project Director

## **EDUCATION**

***Princeton University***, B.S.E. - Civil Engineering (Water Resources)

***Northeastern University***, M.S. - Civil (Environmental) Engineering

***MIT (Sloan School & Center for Real Estate)*** - Graduate Coursework, Real Estate Investments & Finance, Green Development

## REGISTRATIONS, CERTIFICATIONS, & DISTINCTIONS

- Registered Professional Engineer (Environmental): Massachusetts (#45965)
- Licensed Professional Engineer New Hampshire (#14584)
- Registered Professional Engineer (Civil) – Maine (#6998)
- Licensed Site Professional (LSP): Massachusetts (#1548)
- Licensed Wastewater Treatment Plant Operator – Grade 2-Industrial (#13239)
- Licensed Site Professional Association (LSPA) Regulations Committee
- Former Town of Andover (MA) Recycling Committee (Chair)
- Ballardvale Fire Station Building Committee (Vice Chair)
- Former Treasurer (elected) – Campus Consortium for Environmental Excellence (C2E2)
- American Society of Civil Engineering (ASCE) – Member Grade
- Board of Directors, Center for Northern Woodlands Education
- Board of Directors, Massachusetts Fiscal Alliance
- New York State “Master Forest Owner” (Cornell University)
- Outstanding Environmental Education Award from Environmental Business Council of New England for the “Environmental Virtual Campus” (2003) <http://www.c2e2.org/evc/home.html>

## PUBLICATIONS – BOOKS AND BOOK CHAPTERS

- Noonan, David C. and James T. Curtis, 1990. *Groundwater Remediation and Petroleum: A Guide for Underground Storage Tanks* (Chelsea, MI: Lewis Publishers, Inc.).
- Pedersen, Tom A. and James T. Curtis. 1991. *Soil Vapor Extraction Technology* (Park Ridge, NJ: Noyes Data Corporation).
- Curtis, James T., 1992. “*Managing a Leaking Tank Case.*” In: *Liability for Storage Tanks*, M.L. Italiano et al (New York City: Practising Law Institute). 2nd Ed.
- Curtis, James T., 1992. “*Contaminants That Have Diffused Into Mineral Grains or Rocks in Either the Unsaturated or Saturated Zone.*” In: *Mobility and Degradation of Organic Contaminants in Subsurface Environments*, W.J. Lyman et al (Chelsea, MI: C.K. Smoley).

## OTHER SELECTED PUBLICATIONS

- Curtis, James T. and David C. Noonan, 1987. *Corrective Action Technologies and Their Cost-Effectiveness*. Proceedings of the Focus on Eastern Regional Groundwater Issues, Burlington, VT.
- Noonan, D.C., J.T. Curtis, T.A. Pedersen, and J. Durant, 1988. *Cleanup of Releases from Petroleum USTs: Selected Technologies*. EPA/530/UST-88/001.
- Camp Dresser & McKee, 1990. *Assessing UST Corrective Action Technologies: Site Assessment and Selection of Unsaturated Zone Treatment Technologies* (EPA/600/2-90/011).
- Curtis, James T., Tom A. Pedersen, and Chi-Yuan Fan, 1990. *Soil Vapor Extraction Technology Assessment*. Proceedings of the Sixteenth Annual EPA Hazardous Waste Research Symposium, Cincinnati, OH.
- Pedersen, Tom A. and James T. Curtis, 1991. *Soil Vapor Extraction Technology: Reference Handbook*. EPA/540/2-91/003.
- Curtis, James T., 1992. *Soil Vapor Extraction Removes Subsurface Volatiles*. *Pollution Engineering*, 24(8):56-59
- Curtis, James. T. and Peter J. Connolly, 1993. “The Use of a Mobile SVE Trailer for Quick, Effective VOC Removal.” Chapter 20 in *Hydrocarbon Contaminated Soils*. Volume III. Chelsea. MI (Lewis

## SELECTED PRESENTATIONS

May 2014. *Who's Paying for this Cleanup? Insurance Issues at 21E Sites*. LSP Association, Waltham, MA.

2009 – 2016 (annually). Westborough, MA. Presenter – *MCP for Everyone*. LSP Association course.

June 2006. Waltham, MA. Coordinator and Speaker, *Spring 2006 LSP Exam Refresher Course*. LSP Association.

January 2006. Cambridge, MA. *How Not to Fail Your EHS-MS Audit*. 2006 MIT IAP Course (non-credit).

June 2005. Manhattan, KA (Invited). *Improving Environmental Performance Using the Environmental Virtual Campus (EVC)*". 2005 Kansas Sate University College and University Hazardous Waste Workshop.

January 2004. Cambridge, MA. *MIT's Model Environment, Health & Safety Management System*. 2004 Massachusetts Institute of Technology, Independent Activities Period (IAP) Course (non-credit).

July 2003. Nashville, TN. *Environmental Virtual Campus: A Free On Line Tool to Improve University EHS Compliance*. National Conference of the Campus Safety Health Environmental Management Professionals.

June 2003. Ithaca, NY. *MIT's EHS Management System: Organizational Changes Key to Success*. Cornell University "Advanced EMS Workshop"

May 2003. Boston. *MIT's Environmental Virtual Campus: An Engaging Approach to EHS Awareness*. EnviroExpo.

April 2003. Cambridge, MA. *C&D Recycling: An Owner's Perspective*. Harvard University, Best Practices Exchange.

January 2003. Cambridge, MA. *Why Is Everyone Talking About EHS Management Systems?* 2003 Massachusetts Institute of Technology, Independent Activities Period (IAP) Course (non-credit).

October 2000. Cambridge, MA. *Sustainability Practices at Colleges and Universities*. Campus Environmental Leadership Summit, Harvard University.

***Jeanne Westervelt, PG, LSP***  
***Technical Services Director***

## **SUMMARY**

Ms. Westervelt has more than 20 years of progressive experience in the environmental field, specializing in Environmental Site Assessments, remedial investigations, feasibility studies, conceptual design, and subcontractor management for a variety of hazardous waste, industrial, and brownfields sites.

Ms. Westervelt is a Massachusetts Licensed Site Professional as well as a Registered Professional Geologist. She manages many of Cooperstown's Massachusetts Contingency Plan (MCP) assessment and remediation projects, including those resulting from releases of petroleum, chlorinated solvents, metals, and urban fill.

While previously working for a prior firm, Ms. Westervelt managed multiple hazardous waste projects for various Superfund sites under the EPA TES III and REM II contracts as well as large-scale projects for private industrial clients. She was also Design Area Manager for a portion of the Central Artery/Tunnel Right-of-Way Assessment and Remediation (ROWARS) Contract and performed site assessment and remediation at numerous properties along the Right-of-Way. All of these projects entailed characterizing the nature and extent of contamination, developing remedial alternatives and specifications, and implementing cleanup plans.

## **EXPERIENCE HISTORY**

***Cooperstown Environmental LLC*** (2012 – present)  
Andover, Massachusetts  
Technical Services Director

***SAK Environmental LLC*** (2007-2012)  
North Andover, MA  
Consulting Professional Geologist

***Camp Dresser & McKee Inc.*** (1989 - 1996)  
Cambridge, Massachusetts  
Project Manager, Hazardous Waste Division

***Camp Dresser & McKee Inc.*** (1987-1989)  
New York, NY  
Project Geologist, EPA REM II Contract

## **EDUCATION**

***Duquesne University***, B.S. Geology

## REPRESENTATIVE EXPERIENCE

**Massachusetts Contingency Plan (MCP).** For a private client with a chlorinated solvent release under a large building, Ms. Westervelt has planned and managed all aspects of site remediation including soil and groundwater analysis, DNAPL evaluation, and sub-slab and indoor air evaluations. This project is ongoing.

At a former gasoline and petroleum storage facility that had several documented releases of gasoline, diesel, and #2 fuel oil, Ms. Westervelt evaluated and planned for remediation of residual NAPL at the site and groundwater concentrations above GW-2 and GW-3 standards. The site was closed following excavation and NAPL recovery along with evaluation of sub-slab gas concentrations to demonstrate no significant risk.

For the Central Artery ROWARS contract, Ms. Westervelt was responsible for two of the first design areas to go through the remediation assessment process. These sections of the right-of-way were affected by elevated PAHs and metals resulting from poor quality fill, which influenced both the assessment procedures for the area and the ultimate disposal options for project soils. Ms. Westervelt was responsible for supervising the analysis of soil and groundwater quality data, making decisions about which areas required pre-construction remediation, and evaluating re-use and disposal options for soils located within the project area.

**Private Industrial.** For an industrial client in New York, Ms. Westervelt supervised site assessment investigations to characterize groundwater contaminated with inorganics surrounding impoundments of pot lining waste. This included drilling, sampling of soil and groundwater, and hydraulic conductivity evaluations. In addition, she designed the long-term groundwater compliance monitoring system for a secure landfill that was being constructed at the facility to contain waste excavated from other areas as part of the remediation program.

**EPA Superfund Program.** Ms. Westervelt was a project geologist on numerous EPA RI/FS projects in Regions I and II under the REM II contract. She prepared reports, analyzed data, assessed clean-up alternatives, and implemented field-sampling programs. Projects included solvent contaminated municipal supply wells, former landfills, and hazardous waste sites contaminated with chlorinated solvents and heavy metals.

## REGISTRATIONS & CERTIFICATIONS

- Massachusetts Licensed Site Professional #4097
- Pennsylvania Professional Geologist #PG002883G
- OSHA Hazardous Waste Training - Level B
- OSHA Health and Safety Supervisor Training

**Ariel Newman Wright, MS**  
**Sr. Project Scientist**

## **SUMMARY**

Ms. Wright has a Master’s Degree in Civil and Environmental Engineering with a focus on Environmental Health and Risk Assessment and serves as Cooperstown’s Senior Risk Assessor. With more than 7 years of technical experience in environmental consulting and state government, Ms. Wright is experienced in many aspects of the Massachusetts Contingency Plan (MCP), underground storage tanks (USTs), Environmental Site Assessments (ESAs), state reimbursement programs, and Brownfields site redevelopments and tax credits. Ms. Wright also provides important technical leadership in IT issues within Cooperstown’s organization.

## **EXPERIENCE HISTORY**

### ***Cooperstown Environmental LLC*** (2013 – present)

Andover, Massachusetts  
Senior Project Scientist

### ***Massachusetts Department of Revenue (DOR)*** (2009 - 2013)

Boston, Massachusetts  
Massachusetts UST Program

### ***Loureiro Engineering Associates*** (2007 - 2008)

Plainville, Connecticut  
Scientist I

## **EDUCATION**

***University of Connecticut***, B.S. – Environmental Science (Natural Resources)

***Tufts University***, M.S. - Civil & Environmental Engineering (Environ. Health and Risk Assessment)

## **MEMBERSHIPS & CERTIFICATIONS**

- Member of the Society of Risk Analysis (New England chapter and national)
- Member of the LSP Association
- 40-hour HAZWOPER certification

## **TECHNICAL SKILLS**

- Microsoft Office Suite (Word/Excel/Access/PowerPoint/Outlook/OneNote)
- Windows 10 through Windows NT
- Adobe Photoshop
- C/C++

## COMPANY PROFILE



Samiotes Consultants, Inc. is a Civil Engineering firm founded in 1987 with offices in Framingham. Samiotes expanded its practice in 2002 to include Land Surveying and was certified as a Woman-owned Business Enterprise (WBE) in the Commonwealth of Massachusetts for Civil Engineering and Land Surveying in 2012.

The design philosophy at Samiotes is to integrate the client's vision with economic viability such that the final product is a sustainable environment serving the needs of both the end user and the community in which the use is located.

Samiotes takes pride in their innovative approaches to sustainability. We are currently responsible for or recently completed several energy efficient projects throughout the Commonwealth including; the Boston Redevelopment Authority (BRA, now BPDA) E+ Housing Challenge with Utile; the E+ expansion (and original LEED Platinum project) for Artists for Humanity in South Boston; the Alewife Brook Parkway Retail Center in Cambridge, which received the GoGreen Award from the City of Cambridge for its innovative stormwater design; the affordable Hyde-Blakemore Condominiums in Roslindale for Urban Edge with Utile, which incorporated photovoltaic panels on the buildings' roofs and rain gardens for stormwater management; and numerous others.

Samiotes has extensive experience with affordable housing projects in Boston, such as the Roxbury Tenants of Harvard development in Mission Hill; the Parcel 24 South Building in Chinatown with Utile; the Trull-Ware Neighborhood Homes Development project; the Urban Edge Limited Partnership (LP) Apartments in Dorchester; the LBB Apartments in Dorchester & Mattapan; the Wardman Street Apartments in Roxbury; the Cleaves Court Apartments in Roxbury; the Walker Park Apartments in Roxbury; the Jamaica Plain Apartments in Jamaica Plain; Northeastern University's Davenport Commons, a mixed-use development of student and affordable housing with below-grade parking and retail space; and the VietAID Upper Washington Street Housing development in Dorchester with Utile.

We are also working for the Cambridge Housing Authority at Newtowne Court and Putnam Gardens. Newtowne Court consists of eight, three-story walk-up buildings, containing a total of 268 apartments located in the Area 4 Neighborhood of Cambridge. Both Newtowne Court and Putnam Gardens have remained approximately 85%-90% occupied during the construction period.

Samiotes is working and has worked on multiple housing projects with New Atlantic Development. Recent projects include Girard (with Utile and New Atlantic Development), a mixed-use development with 160 housing units and 3,600 square feet of retail space in Boston's South End; Olmsted Hill, a 40-B residential development in the historic Fisher Hill area of Brookline, consisting of 10 market-rate single-family homes and 24-units of affordable housing; and the Concord Housing Trust Town-sponsored 40-B development consisting of 12-units of various housing types and configurations.

**Samiotes Consultants, Inc.**  
Civil Engineers + Land Surveyors

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**Stephen R. Garvin, PE, LEED AP**  
*President*

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RESUME

Mr. Garvin is President of Samiotes Consultants and has been with the Company since 1993. He is a graduate of the University of Massachusetts Dartmouth with a Bachelor of Science in Civil Engineering. He is a Registered Professional Civil Engineer in the Commonwealth of Massachusetts, the State of Connecticut, the State of New Hampshire, the State of Maine and the State of Rhode Island. Additionally, he is an approved Soil Evaluator and a LEED Accredited Professional.

Stephen has been responsible for numerous affordable housing projects such as the Hyde Blakemore Condominiums in Roslindale for Urban Edge CDC with Utile; the the Olmsted Hill, 40-B affordable housing development in Brookline with New Atlantic Development; Girard, a mixed-use development with 160 housing units and 3,600 square-feet of retail space in Boston's South End, with New Atlantic Development and Utile; the Boston Redevelopment Authority (BRA, now BPDA) E+ Housing Challenge with Utile; the Jamaica Plain Apartments, a 10 buildings, 103 apartment units rehabilitation project for Urban Edge CDC in Boston; the Trull-Ware Neighborhood Homes Development project in Boston; the Roxbury Tenants of Harvard development in Mission Hill; St. Jean-Baptiste Development in Lynn; the Alewife Brook Parkway Retail Center in Cambridge, which received the GoGreen Award from the City of Cambridge for its innovative stormwater design; Northeastern University's Davenport Commons, a mixed-use development of student and affordable housing with below-grade parking and retail space; and two projects for the Cambridge Housing Authority: Newtowne Court, which consists of eight, three-story walk-up building, containing 268 apartments, and Putnam Gardens, both have remained approximately 85-90% occupied during the construction period.

Mr. Garvin's responsibilities on these projects and many others entails obtaining state and local approvals, hydrologic design and calculations, writing contract specifications, review of all contract documents, construction administration, coordination of design issues with various disciplines, and all aspects of site and utility design. In addition to these duties, Mr. Garvin is responsible for the day-to-day management of the firm and Client relationship / development.

In addition to his work at Samiotes, Mr. Garvin is also the Chairman of the Sudbury Planning Board.

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**Alicja A. Zukowski, PE**  
*Senior Associate*

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RESUME

Ms. Zukowski graduated with highest honors from Warsaw Polytechnic in Warsaw, Poland with a Bachelor of Science in Civil Engineering in 1983. Ms. Zukowski is also a 1973 graduate of the Warsaw Geological Technical School. Ms. Zukowski is a Registered Professional Engineer in the Commonwealth of Massachusetts (#47646).

Ms. Zukowski has over 20 years of experience at Samiotes working on academic and housing projects. As a Senior Associate for Samiotes Consultants, she is currently working on a number of projects including the Harvard Kennedy School of Government Pavilions project in Cambridge (applying for LEED Gold); the Parcel 24 residential development in Chinatown with Utile; and the 26 West Broadway mixed-use development in South Boston with Utile.

Other projects recently completed include a number of site designs including the St. Jean-Baptiste Redevelopment affordable housing project in Lynn, consisting of a 22-unit apartment building, a two-family house and seven duplex townhouses for the Planning Office for Urban Affairs; CambridgePark Place, a 311-unit mixed-use development built within the 100-year flood plain in Cambridge; the Riverway House at Wheelock College in Boston, which was certified LEED Gold; Olmsted Hill, with New Atlantic Development, a 34-unit 40-B residential development in the historic Fisher Hill area of Brookline, consisting of 10 market-rate single-family home lots and 24-units of affordable housing; the Concord Housing Trust Town-sponsored 40-B development, with New Atlantic Development; and numerous projects on the Dimock Community Health Center campus in Roxbury: Gatehouse Building, Youth and Family Center addition, Sewell Building Transitional Housing and Cary Cottage.

Ms. Zukowski's responsibilities on these projects and others include all phases of site planning and design, obtaining state, federal, and local approvals before various boards and agencies, civil and site engineering calculations and design, developing site plans and profiles on Land Development Desktop and Civil 3D software and construction administration. Additionally, Ms. Zukowski is responsible for the company AutoCAD procedures and standards for plan development.

Prior to joining Samiotes Consultants, Inc., Ms. Zukowski was employed by the Office of Geophysical Research in Poland and the Central Office for Research and Design of Highways and Bridges in Poland. Ms. Zukowski worked on a wide variety of development projects including the design of highways, roadways and parking facilities. Ms. Zukowski was also involved in the United Nations special adjunct for design of the Trans-European Highway throughout Poland and Highway Design in Libya and Algeria.

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547 Rutherford Ave | Charlestown | MA | 02129  
617.500.6530 | www.offshootsinc.com

## STATEMENT OF QUALIFICATIONS- Multi-Family Residential

### FIRM DESCRIPTION

Focused on creating productive landscapes that provide ecological, social and economic benefits, Offshoots, Inc. is a hybrid landscape architecture design and landscape installation company. Kate Kennen started the practice in 2006. The firm specializes in designing and installing sustainable urban landscapes in the Boston area and has 8 full time employees.

Offshoots founder and President Kate Kennen coauthored the book *PHYTO: Principles of Site Remediation and Landscape Design* which documents the latest green infrastructure strategies for removing pollutants from water, soils and air. As a visiting faculty member at the Harvard University Graduate School of Design and frequent lecturer in the subject of plant-based pollution removal, Kate is versed in integrating phytoremediation plant community design into projects of any scale.

The intensity of rapid decentralized urbanization, as well as a lack of understanding of landscape ecology, have allowed natural systems in the US to be ignored as resources for water, sustainability, and recreational amenities. The work at Offshoots, Inc. focuses on alleviating landscapes of traditionally intense maintenance regimes, draining client funds while dumping tons of nitrogen fertilizer and water onto lawns and plantings. An alternate landscape model is used where productive open spaces can achieve ecological and social benefit, advancing housing projects both environmentally and financially.

### SHORT SUMMARY OF QUALIFICATIONS

- Kate Kennen, Offshoots Owner, MA Registered Landscape Architect #1255
- Women Owned Business, Certified WBE in Massachusetts, and federal DBE certified
- Designers & Project Managers certified by NOFA (New England Organic Farming Association) as certified Organic Land Care Professionals
- Project Managers certified as Massachusetts Certified Landscape Professionals by the Massachusetts Association of Landscape Professionals
- MassDOT Pre-Approved Landscape Architect

### Relevant Work

Offshoots, Inc. has provided landscape design services for many multi-family residential and public realm improvement projects in Massachusetts, including both affordable housing and market rate developments. Our project work is diverse in scale and scope, and includes not only multi-family residential work, but streetscape and public park improvements, phytotechnology projects (using plants to clean up contaminated brownfield sites), and gardens for single family residences.

*Please see attached project description pages.*

## Kate Kennen, RLA

### EDUCATION

- Harvard University** Graduate School of Design, Master in Landscape Architecture with distinction, June 2005
- Cornell University** Bachelor of Science in Landscape Architecture, June 1998, (GPA 3.68)
- Syracuse University** Syracuse University, Study Abroad in Architecture, Florence, Italy, Spring 1997

### PROFESSIONAL REGISTRATION

Registered Landscape Architect, Massachusetts #1255 since 2000

### RESEARCH & TEACHING

- Current Research:** **Phytotechnologies: Urban design and landscape strategies for infrastructure and city revitalization**  
+ Coauthored book titled *PHYTO: Principles of Site Remediation & Landscape Design* with Niall Kirkwood at Harvard Graduate School of Design. Published in June 2015 by Routledge Publishing.
- Teaching & Speaking Engagements:**
  - + Faculty Member, Harvard Graduate School of Design, Department of Landscape Architecture 2010-2014
  - + Guest presentations on urban design and ecological strategies for revitalization, remediation, and redevelopment at the following institutions and conferences ongoing since 2007: Mayors Institute on City Design (Miami), Harvard Graduate School of Design, University of Pennsylvania, Rhode Island School of Design, Northeastern University, Boston Architectural College, American Society of Landscape Architects, Boston Society of Architects, Boston Society of Landscape Architects, ABX Boston, International Phytotechnologies Society, Arnold Arboretum, Ecological Landscape Alliance, New England Grows and
  - + Harvard Graduate School of Design, Teaching Fellow for Undergraduate Seminar in Landscape Ecology, 2005
  - + Design Workshop, Internal CAD Training Director and CAD seminar instructor, 2000-2003
  - + Wallace Floyd, Continuing Education Instructor in 3D Modeling
  - + Cornell University, Site Grading and Engineering and Construction Detailing Teaching Assistant, 1997

### PROFESSIONAL WORK

- Offshoots, Inc**  
*Boston, MA*  
**Principal, Landscape Architecture, Urban Design & Planning Consultant, 2006 - Present**  
Founded Kennen Landscape Architecture in 2006 which became Offshoots, Inc in 2012. Offshoots, inc is a landscape architecture and urban design practice focusing on ecological and productive landscape strategies. For portfolio of work, please see: [www.offshootsinc.com](http://www.offshootsinc.com) Selected projects include:
  - + Cape Cod Commission, Regional Policy Plan Graphic Design & Layout & Green Infrastructure Strategy for Cape Cod, 2015 BSLA Merit Award
  - + Downtown Hyannis Revitalization Project\*: 2006 MA Governors' Smart Growth Award, 2005 American Planning Association Honor Award, and 2007 EPA National Smart Growth Award (\*Work completed in partnership with Town of Barnstable)
  - + Buzzard's Bay Flood Hazard Mitigation Study, Bourne, MA: 2008 American Planning Association recognition
  - + Plantworks at 725 Main Street, Barnstable, MA: Utilizes phytotechnologies at former gas station site, 2009 BSLA Merit Award
  - + Buoyed Coasts Landscape Installation, Hyannis, MA: 2007 BSLA Honor Award
  - + Gateway Hyannis: Hyannis Harbor Open Space & Economic Development Plan
  - + Longellow Bridge, Phytoremediation Landscape Consultant
  - + Route 6 Stormwater and Vegetation Management Plan, Cape Cod Commission
- Winston Flowers**  
*Boston, MA*  
**Garden Design Creative Director, Part-time, June 2008 - December 2011**  
Started Garden Design department for Boston's largest floral retailer. Within two years, created 1.6 million dollar design/build landscape division with six installation crews focusing on high end landscape design utilizing local Massachusetts suppliers. Developed relationships with plant growers/ nursery network throughout Massachusetts.
- Town of Barnstable**  
*Barnstable, MA*  
**Growth Management Department Landscape Architect, 2005**  
Wrote applications and obtained over three million dollars from six grants to support downtown Hyannis revitalization projects. Initiated green infrastructure planning and park design work to spur redevelopment in downtown core.



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**Association to Preserve Cape Cod**  
Barnstable, MA

**Whitlock Fellowship Summer Intern, Summer 2004**

Completed advocacy and project work for Cape Cod's oldest environmental non-profit. Projects included:  
+ Dennisport Revitalization Project, Dennis, MA: 2004 American Planning Association Honor Award & 2004 MA Governors' Smart Growth Award for rezoning, design guidelines, and visualization work to redevelop the downtown core.  
+ Priority Open Space Parcel Analysis: GIS modeling to determine priority Cape Cod parcels to preserve based on ecological services.

**Design Workshop**  
Aspen, CO

**Associate Landscape Architect, Sept. 2000 - Sept. 2003**

Project manager and lead designer for community planning, golf course, large resort and high-end residential projects. Significant projects designed and managed include:  
+ Stotts Mills, Basalt, CO: Land planning and approvals for 18 acre, 153 unit cluster housing development  
+ Snowmass Club, CO: LEED Silver certified clubhouse on 18 hole golf course and 36 new high-end resort condos.  
+ Marriott Timbers Lodge, South Lake Tahoe, CA: 340 high end fractional units and hotel suites and outdoor retail planning.  
+ River Walk Master Plan, Basalt, CO: River's edge redevelopment including affordable housing strategies for the town.  
+ Four High-End Residential Landscapes: Project managed landscape design for large residences through construction completion.

**Wallace Floyd Associates**  
Boston, MA

**Project Landscape Architect, June 1998 - Sept 2000**

Produced construction documents for 13 built public landscapes in Massachusetts. Projects include waterfront parks, streetscapes, neighborhood playgrounds and schoolyards. Taught in-house continuing education programs in computer drafting software.  
+ Boston Schoolyards Initiative, Boston, MA: 2001 BSLA Honor Award.  
+ Amherst Parking Garage and Roof Garden: Prepared Construction Documents. 2001 BSLA Honor Award.

**Pleasant View Nursery**  
Paxton, MA

**Family Owned Business, 1990 - Present**

Grew up on nursery/ garden center in central Massachusetts. Involved in operations and design/build projects since childhood.

**AWARDS & HONORS**

- +For list of project awards from BSLA, APA & EPA, see [www.offshootsinc.com](http://www.offshootsinc.com)
- + ASLA
- + New England Organic Farming Association Landscape Professional (NOFA) Certified, 2010
- + Appointed to Mayor Menino's Boston Complete Streets Committee, 2010
- + National ASLA Student Award of Excellence for Graduate Student Work, Vivero Metropolitan, 2005
- + Boston Chapter of American Society of Landscape Architects Award of Honor for GSD Student Work, 2005
- + Harvard Graduate School of Design, Studioworks Distinction, 2 Projects, 2004 & 2005
- + ULI Student Competition Honorable Mention, 'Trading Places', 2004
- + American Society of Landscape Architects Award of Honor for Cornell University Student Work, 1998
- + New York Chapter American Society of Landscape Architects Student Competition, Merit Award, 1997
- + Syracuse University School of Architecture, First Place Award for Black and White Photography, Florence Italy, 1997
- + Cornell Agricultural and Life Sciences Honor Society, 1996

**MEDIA**

**Selected work featured in the following publications:**

- + Ulam, Alex (2013, April) Phyto your Life. *Landscape Architecture Magazine*, 52-56
- + Felici-Gallant, L. (2010, July/Aug./Sept.) Growing Up: Vertical Gardening Takes Nature to New Heights. *Coastal Home Magazine*, 61-63.
- + Andrews, J. (2010, March). Uptown Harvest. *Garden Design Magazine*, 164, 11-14.
- + Gehrman, E. (2010, April 18). Window Dressing. *Boston Sunday Globe*, 32.
- + Hoepner, K. (2009, May-June). Interview- Kate Kennen. *New England Home Magazine*, 74-80.
- + Still, D. (2006, May 5) A Different Kind of Park Cleanup: Planting science will help clean park soils. *Barnstable Patriot*, A-1.
- + Waldheim, C. (2006) Energetic Community. in *Post Fordist Public Works: Landscape Urbanism Strategies* (pp.74-83) United States: Lulu
- + Hines, S. (2005, October) Tons of Idealism, Pounds of Design Vision. *Landscape Architecture Magazine*, 56-57.
- + Shorr, K. (2005, May). Who's Afraid of Building up Now? With Dennisport as a model, Cape town are flirting with the idea of cluster zoning. *Cape Cod Magazine*, 40-45.



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## Shelby Chapman-Hale

*Landscape Architectural Designer, Offshoots, Inc.*

### EDUCATION

**University of Oregon** School of Architecture and Allied Arts, Master in Landscape Architecture, June 2013

**University of Vermont** Bachelor of Environmental Science and Ecological Design, June 2008

### RESEARCH & TEACHING

**Research:** **A Place for Parking: Design Guidelines for Surface Parking Lots**

+ Masters project at University of Oregon, accepted June 2015. Presented at CELA conference in March, 2014.

**Teaching & Speaking Engagements:** + University of Oregon School of Architecture and Allied Arts, Teaching Fellow for Plant Identification and Design, 2012, 2013

+ University of Oregon School of Architecture and Allied Arts, Teaching Fellow for Land Analysis, 2012

+ University of Vermont Rubenstein school Forestry Department, Dendrology Teaching Assistant, 2006, 2007

### PROFESSIONAL WORK

**Offshoots, Inc** **Landscape Architectural Designer, Project Manager, Present**

*Boston, MA* Responsible for design, drafting, graphics, construction documents, and project management of residential, multi-family, and municipal projects.

+ Vita, Boston, MA - Multi-use development, Project Manager

+ Barnstable Village, Barnstable, MA - Municipal Streetscape design, Project manager

+ Southfield Town Center, Weymouth, MA - Multi-use development, Project manager

+ Volvo Village of Boston, Allston, MA - Commercial space renovation, Project manager

+ Cable Mills, Williamstown, MA - Multi-family development and riparian restoration, Landscape Designer

**Morgan Wheelock** **Staff Landscape Architect, September 2013 - February 2016**

*Boston, MA*

Developed construction documents, schematic renderings, cost estimates, and planting design for high-end residential and estate projects in New England.

+ 90 Acre Estate on Cape Cod: Prepared construction documents and developed planting design through installation for an estate which includes an extensive orchard, organic vegetable garden, cutting garden, livestock and apiary

+ High-end Residences Newton, Brookline, and Chestnut Hill, MA: Worked with project lead to develop multiple projects from schematic design through construction documents

**University of Oregon** **Assistant to the Director at the Fuller Center for Productive Landscapes, July 2013**

*Dalton, PA*

Assisted director of a summer field school for landscape architecture students focused on productive landscape research and design. Organized schedule for visiting lectures, travel to New York and Philadelphia for firm and site visits. Developed graphics for end of term student presentations and art walk.

**University of Vermont** **Research Intern, February 2008 - August 2008**

*Burlington, VT*

Assistant to the consulting architect for the Greening of Aiken project. Researched potential sustainable site LEED credits for the renovation of the building that houses the University's Rubenstein School.

**Gardener's Supply Co.** **Nursery Associate and Pre-Season Coordinator, Gardener's Supply Company, 2007 - 2009**

*Burlington, VT*

Helped retail customers select the appropriate plants for their site and design requirements. Part of a team that maintained a 6 acre retail nursery. Promoted to Pre-Season coordinator in 2008, responsible for coordinating and fulfilling spring orders for retail customers.

### AWARDS & HONORS

+ Marie and Arthur Berger Award, University of Oregon School of Architecture and Allied Arts, Dept. of Landscape Architecture, 2012

+ Vermont Scholars Award, University of Vermont, 2004-2008

### MEDIA

**Selected work featured in the following publication:**

+ LAGI, Klein, C. (2013) Freshkills Flock in Regenerative Infrastructures:

Freshkills Park, NYC (pp.222) New York: Prestel.



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**Association to Preserve Cape Cod**  
Barnstable, MA

**Whitlock Fellowship Summer Intern, Summer 2004**

Completed advocacy and project work for Cape Cod's oldest environmental non-profit. Projects included:  
+ Dennisport Revitalization Project, Dennis, MA: 2004 American Planning Association Honor Award & 2004 MA Governors' Smart Growth Award for rezoning, design guidelines, and visualization work to redevelop the downtown core.  
+ Priority Open Space Parcel Analysis: GIS modeling to determine priority Cape Cod parcels to preserve based on ecological services.

**Design Workshop**  
Aspen, CO

**Associate Landscape Architect, Sept. 2000 - Sept. 2003**

Project manager and lead designer for community planning, golf course, large resort and high-end residential projects. Significant projects designed and managed include:  
+ Stotts Mills, Basalt, CO: Land planning and approvals for 18 acre, 153 unit cluster housing development  
+ Snowmass Club, CO: LEED Silver certified clubhouse on 18 hole golf course and 36 new high-end resort condos.  
+ Marriott Timbers Lodge, South Lake Tahoe, CA: 340 high end fractional units and hotel suites and outdoor retail planning.  
+ River Walk Master Plan, Basalt, CO: River's edge redevelopment including affordable housing strategies for the town.  
+ Four High-End Residential Landscapes: Project managed landscape design for large residences through construction completion.

**Wallace Floyd Associates**  
Boston, MA

**Project Landscape Architect, June 1998 - Sept 2000**

Produced construction documents for 13 built public landscapes in Massachusetts. Projects include waterfront parks, streetscapes, neighborhood playgrounds and schoolyards. Taught in-house continuing education programs in computer drafting software.  
+ Boston Schoolyards Initiative, Boston, MA: 2001 BSLA Honor Award.  
+ Amherst Parking Garage and Roof Garden: Prepared Construction Documents. 2001 BSLA Honor Award.

**Pleasant View Nursery**  
Paxton, MA

**Family Owned Business, 1990 - Present**

Grew up on nursery/ garden center in central Massachusetts. Involved in operations and design/build projects since childhood.

**AWARDS & HONORS**

- +For list of project awards from BSLA, APA & EPA, see [www.offshootsinc.com](http://www.offshootsinc.com)
- + ASLA
- + New England Organic Farming Association Landscape Professional (NOFA) Certified, 2010
- + Appointed to Mayor Menino's Boston Complete Streets Committee, 2010
- + National ASLA Student Award of Excellence for Graduate Student Work, Vivero Metropolitan, 2005
- + Boston Chapter of American Society of Landscape Architects Award of Honor for GSD Student Work, 2005
- + Harvard Graduate School of Design, Studioworks Distinction, 2 Projects, 2004 & 2005
- + ULI Student Competition Honorable Mention, 'Trading Places', 2004
- + American Society of Landscape Architects Award of Honor for Cornell University Student Work, 1998
- + New York Chapter American Society of Landscape Architects Student Competition, Merit Award, 1997
- + Syracuse University School of Architecture, First Place Award for Black and White Photography, Florence Italy, 1997
- + Cornell Agricultural and Life Sciences Honor Society, 1996

**MEDIA**

**Selected work featured in the following publications:**

- + Ulam, Alex (2013, April) Phyto your Life. *Landscape Architecture Magazine*, 52-56
- + Felici-Gallant, L. (2010, July/Aug./Sept.) Growing Up: Vertical Gardening Takes Nature to New Heights. *Coastal Home Magazine*, 61-63.
- + Andrews, J. (2010, March). Uptown Harvest. *Garden Design Magazine*, 164, 11-14.
- + Gehrman, E. (2010, April 18). Window Dressing. *Boston Sunday Globe*, 32.
- + Hoepner, K. (2009, May-June). Interview- Kate Kennen. *New England Home Magazine*, 74-80.
- + Still, D. (2006, May 5) A Different Kind of Park Cleanup: Planting science will help clean park soils. *Barnstable Patriot*, A-1.
- + Waldheim, C. (2006) Energetic Community. in *Post Fordist Public Works: Landscape Urbanism Strategies* (pp.74-83) United States: Lulu
- + Hines, S. (2005, October) Tons of Idealism, Pounds of Design Vision. *Landscape Architecture Magazine*, 56-57.
- + Shorr, K. (2005, May). Who's Afraid of Building up Now? With Dennisport as a model, Cape town are flirting with the idea of cluster zoning. *Cape Cod Magazine*, 40-45.



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## Allendale Neighborhood

Location: Boston, MA Client: Wondergroup Architect: Merge

- Multi-Family
- LEED Platinum
- Net Zero Energy
- Green Infrastructure
- Low-Maintenance
- Low Water Use
- Native Planting



Rendering provided by Merge Architecture

### PROJECT DESCRIPTION

Offshoots worked with Merge Architects on this proposed LEED platinum project for a net-zero neighborhood in West Roxbury. The buildings are a contemporary take on the local vernacular, utilizing the gable roof as an architectural component and shared community spaces for more interaction. The existing site is a disturbed landscape, once formerly clear-cut farmland and now two acres of mostly invasive, non-native undergrowth with young canopy trees. Because of the property's adjacency to Allendale Woods, the project prioritizes new ecological and pedestrian connections through the site. Existing trees are preserved wherever possible, especially along Allendale Road where a 20' wide buffer of existing trees along the roadway will be maintained. Each unit is connected to the shared street with a pervious paver driveway that will help to recharge stormwater. Bioswales and vegetated rain gardens will line the paved areas where possible, and multiple small scale stormwater treatment sites will be created to both retain and filter water. All landscaped areas will be designed with native plants, creating new habitat and an ecological seed bank for the adjacent Allendale Woods. The site will be landscaped with primarily native species; only very small lawns with vegetable gardening areas have been provided for individual unit owners and no areas of grass are included in common areas. These strategies will not only provide ecological benefit, but will minimize garden maintenance and water requirements to create a long term self-sustaining landscape.



Site Plan by Offshoots



Rendering provided by Merge Architecture

#### Proposed Design:

- Energy star rating 3.0
- 20 units
- Net zero energy development
- LEED Platinum
- Bioswales and Stormwater Management connecting native ecologies



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## One Beech - Affordable Senior Housing

Location: Revere, MA Client: The Neighborhood Developers Architect: Utile

Affordable Housing  
Phytotechnologies  
Multi-family  
Low Water Use



### PROJECT DESCRIPTION

Offshoots, Inc. developed the landscape plan for this multi-family affordable housing project in Revere. The project includes a new streetscape and an urban courtyard that maximizes programmable community space in a very small footprint. Cafe tables and a space for gatherings are created within a planted perimeter. Custom benches and a double-sided fence provide architectural interest while screening adjacent non-desirable views. The courtyard maximizes sun exposure and provides seasonal interest for residents with low maintenance plants.

Sustainability features include low water use plantings to limit longterm water consumption and a phytoremediation buffer of hybrid poplars along the parking lot to mitigate potential petroleum contamination from the adjacent auto-repair shop.

The project was completed in 2017.



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## Southfield, Town Center

Location: Weymouth, MA Client: John M. Corcoran and Company Architect: Utile

- Multi-Family Housing
- Low-Maintenance
- Low Water Use
- Native Planting



Rendering by VUW

### PROJECT DESCRIPTION

Offshoots designed the landscape for a new mixed-use development on the former Southfield air base in Weymouth. Town Center will feature a large sandplain meadow installed as an ornamental feature intended to preserve the existing cultural landscape, provide wildlife habitat, expand the existing wildlife corridor, and replenish the local seed bank. The remainder of the landscape will be planted with a largely native, low-maintenance plant palette that focuses on creating seasonal interest through layers of textured plant masses. The site will be heavily planted with groundcover plants to eliminate the need for additional mulch application and the site's irrigation is scheduled to turn off once the plants are established. Site specific planting will reduce the need for long-term maintenance, watering, fertilizing and mulch application.



Rendering by Utile

The project is currently under construction and will be completed in 2018.



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## Firm Profile

### Introduction

RSE Associates, Inc. was established in 2001 and has since expanded into a multi-disciplinary international firm. With offices across the United States and in London, RSE has successfully completed award winning projects throughout America, Europe and Asia. Our principals and engineers have extensive and diverse experience in complex and demanding projects. We provide the technical ability of a large international firm with the personal service of a small firm.

### Technology/BIM

Engineering design is carried out using state-of-the art computer software. We have extensive experience in delivering projects with Building Information Modeling (BIM) requirements, fully integrating the building structure with the overall building information models.

### Services

We provide a full range of structural and geotechnical engineering services including:

- New Construction
- Renovation/Adaptive Reuse and Historic Restoration
- Master Plan and Feasibility Study
- Structural Investigation
- Design Competition
- Temporary Construction Support Systems

### Building Types

We have extensive experience in a wide range of project types including:

- Museum
- Office
- Retail
- Residential
- High Rise
- Mixed Use
- Educational
- Civic Buildings and Courthouses
- Historic Restoration
- Science and Technology
- Colleges and Universities
- Performing Arts
- Sports Facilities

### Design Philosophy

We strive to provide structural designs that are sensitive to owner requirements, architecture, building services as well as cost effectiveness and ease of construction. Design innovations will be balanced with practical considerations. We are committed to delivering quality and personal service.



Bowdoin College Walker Art Museum



Integrated Science Complex, UMass Boston



Cincinnati River Front Park



Lulu Island, Abu Dhabi



Hamilton College Performing Arts Center

Boston

London

Los Angeles

New York

Portland

[www.rseassociates.com](http://www.rseassociates.com)



## Resume Jennifer McClain, PE



### Key Data

Jennifer McClain is a structural engineer with over 21 years of experience in all phases of project development from conceptual drawings through construction phase services. She has done design work in concrete, steel, timber and masonry.

Jennifer joined RSE Associates, Inc, in 2005, after working at Weidlinger Associates. Jennifer is also a former director on the board of Structural Engineers Association of Massachusetts (SEAMass). She has been responsible for a range of projects including renovations and new construction of research facilities, subway stations, residences, university facilities, and office buildings.

### Profession

Structural Engineer

### Position

Principal

### Education

MS, Structural Engineering  
Tufts University  
1996

BSc, Civil Engineering  
Massachusetts Institute of Technology,  
1993

### Professional Qualifications

Professional Engineer: MA (#41746), CT, SD,  
NC, OH, PA, IA, FL, Washington DC, NJ, MO,  
GA, WY

### Publications

Journal of Structural Engineering, 1999  
Parameter Estimation Incorporating  
Modal Data and Boundary Conditions  
Journal of Structural Engineering, 1997  
Structural Model Updating Using  
Experimental Static Measurements



## Resume Jennifer McClain, PE

### Selected Projects



**J. Michael Ruane Judicial Center  
Salem, MA**  
Architect: Goody Clancy  
Structural Engineering for the \$106M, 195,000 sf new court house building with LEED gold certification which includes the relocation and reuse of the existing church building as the new law library.



**Ahsby Library  
Ashby, MA**  
Architect: The Galante Architecture Studio  
Structural Engineering of the 8,000 sf addition to the existing historic library featuring 30 ft. cantilever floor overhangs.



**Bowdoin College Art Museum  
Brunswick, ME**  
Architect: Machado & Silvetti Associates  
Structural Engineering for the \$18M renovation and addition to a historic building built in the late 1800's. Structural work includes an addition and reconfiguration of the existing structural framing with extensive underpinning of the existing foundations. This project was featured in "Architectural Record".



**Chinatown Community Education Center  
Boston, MA**  
Architect: Brunner/Cott Architects  
Structural Engineering for a new 5 story, 42,000 sf building in a tight urban setting.



**Mount Pleasant Home  
Jamaica Plain, MA**  
Architect: Next Phase Studios  
Structural Engineering of the new \$20M addition and renovations to the existing elder care facility. The 21,640 sf addition includes a new wing and an atrium connecting to the existing building.



**Silver Spring Town Square  
Silver Spring, MD**  
Architect: Machado & Silvetti  
Structural Engineering for the \$20M complex to provide space for the town office and recreation. The complex also includes an outdoor skating rink with a covered canopy.



**UMass Amherst South College Academic Facility  
Amherst, MA**  
Architect: DiMella Shaffer  
Structural Engineering for the \$36M addition and complete renovations to the existing historic building to increase the program space from 16,000 net sf to 54,000 net sf. While the addition is steel framed, the existing building is a wood and masonry structure which required extensive underpinning, seismic upgrades and reconstruction of large portions of floors.



**UMass Amherst Champions Center  
Amherst, MA**  
Architect: JCJ Architecture  
Structural Engineering of the new \$18M men's and women's varsity basketball practice facility. The building includes a thermally separated, cantilevered walkway as well as 2-story showcase areas.



**Franklin Regional County Transit Center  
Greenfield, MA**  
Architect: Charles Rose Architects  
The 24,000 sf Zero Net Energy building not only functions as an inter model transit facility and central office, but as an important element in the Town of Greenfield's revitalization strategy. The building includes a passenger waiting area, community meeting room, and offices for the regional transit authority.



**Alice K. Wolf Center - Cambridge Housing Authority Headquarters  
Cambridge, MA**  
Architect: Finegold Alexander Architects  
Structural Engineering of the \$17.8M renovations and rehabilitations of the 5 story historic building. The building was originally built in 1933 as the Cambridge Police Headquarters, the V.F.W. and American Legion Halls. The building now includes gathering spaces, offices, meeting rooms and classrooms. This project achieved LEED gold certification.



## Resume Jennifer McClain, PE

### Selected Projects



**Fall River Court House**  
**Fall River, MA**  
Architect: Finegold Alexander Architects  
Structural Engineering of the new \$64M , 154,000 sf courthouse building with LEED gold certification.



**Beacom Business School**  
**University of South Dakota**  
**Vermillion, SD**  
Architect: Charles Rose Architects  
Feasibility Study & Structural Engineering of the 72,000 sf new business school. The project features a modern design with multi-level sloping roofs. The school has a large central atrium, tiered high-tech classrooms, a trading floor, administrative offices and a 176 auditorium.



**UMass Amherst Chapel Renovations**  
**Amherst, MA**  
Architect: Finegold Alexander Architects  
Structural Engineering for the \$14M renovations and upgrades t the existing historic building. Care was taken to preserve the existing load bearing masonry and wood structure while creating a modern glass entry and ensuring accessibility throughout.



**Essex North Shore Agricultural Technical School**  
**Danvers, MA**  
Architect: Design Partnership of Cambridge  
Structural Engineering for the new 307,000 sf main building and 3 new buildings with 10,000 sf each. Vocational shops on the lowest level include long spans and high ceilings. The steepness of the site required buildings to be constructed into the hill with tall cantilevered retaining walls to allow backfilling and construction to proceed ahead of steel erection.



**Millis Library**  
**Millis, MA**  
Architect: Oudens Ello Architecture  
Structural Engineering of the new 18,000 sf library building which includes a large common open area.



**Eastham Library**  
**Eastham, MA**  
Architect: Oudens Ello Architecture  
Structural Engineering of the new 18,000 sf library attached to an existing, historic 600 sf structure. This project achieved LEED gold certification.



## Selected Projects – Multi-Family Residential

**Parcel 24 South  
Boston, MA**

Architect:  
Utile, Inc.



Structural Engineering for the new 6-story affordable housing building with 51 residential units.  
- Completed 2017 -

**Parcel U – Phase A  
Jamaica Plain, MA**

Client:  
Urbanica

Structural Engineering for 5 new low-rise buildings with approximately 110-120 residential units. Total square footage is approximately 36,000 sf.  
- Completed 2017 -

**Upper Washington Street  
Housing – Viet AID  
Dorchester, MA**

Architect:  
Utile, Inc.



Structural Engineering for 2 new affordable housing buildings totaling 46,000 sf. One of the buildings is 4-stories tall with 21 residential units; the other is 3-stories tall with 14 residential units.  
- Completed 2016 -

**Roxbury Crossing Senior  
Building  
Roxbury, MA**

Architect:  
Goody Clancy



Structural Engineering for a new 34,700 sf, 5 story building with 4 levels of residential occupancy (40 units) over a parking garage. The building was constructed from CMU and precast concrete plank, with unique design elements that provided visual interest at the exterior.  
- Completed 2015 -

**557/559 East 2<sup>nd</sup> Street  
Boston, MA**

Architect:  
Utile, Inc.



Structural Engineering for a new 3 story condominium building in an urban setting.  
- Completed 2006 -

**321 West 2<sup>nd</sup> Street  
Boston, MA**

Architect:  
Utile, Inc.



Structural Engineering for a new 4 story condominium building in an urban setting.  
- Completed 2006-